MiCONTACT CENTER BUSINESS—MiVOICE BUSINESS

RELEASE 9.3.1

USER GUIDE

⋈ Mitel®

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Chapter 1
MiCONTACT CENTER BUSINESS

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MiCONTACT CENTER BUSINESS

Mitel MiContact Center Business integrates with   MiVoice Business platform to provide contact centers with the tools they need to efficiently and effectively measure and manage contact center operations. Interactions are routed intelligently across all media types (voice, email, chat, SMS, and open media), increasing customer satisfaction and streamlining agent calls. Contact center efficiency and agent performance can be monitored both historically and in real time and can be measured using a wide variety of reports. Flexible licensing packages provide access to specific features and applications and enable you to build a contact center package that best suits your business needs.

CONTACT CENTER AND WORKGROUP

There are two licensing bundles available for MiContact Center Business: Contact Center and Workgroup.

Contact Center is the licensing level of choice for businesses with more than 100 concurrent agents, who want resiliency, and require more than 10 IVR ports.

Workgroup is geared toward contact centers with fewer than 100 concurrent agents, requiring a maximum of 10 IVR ports, with no need for resiliency. Workgroup supports single-node ACD environments only.

Both licensing bundles offer general business and contact center reporting and real-time monitoring, client desktops, and IVR Routing capabilities, and support voice, email, chat, SMS, and open media communication. They include feature-rich, web-based applications for streamlining contact center management and enabling agent productivity. There are several options available to further customize your contact center solution.

For detailed licensing information, see the *MiContact Center Business and MiVoice Analytics System Engineering Guide*.

MiContact Center Business includes the following applications, depending on your licensing bundle:

- CCMWeb
- Contact Center Client
- Interactive Contact Center
- Interactive Visual Queue
- Contact Center PhoneSet Manager
- Contact Center Softphone
- Multimedia Contact Center
- Contact Center Screen Pop
- Flexible Reporting
- IVR Routing
- Workforce Scheduling
- Employee Portal
- Schedule Adherence
- Traffic Analysis
- Ignite

- MiCollab Client
- MiVoice Border Gateway
- CTI Developer Toolkit

LICENSING

An employee is a physical person you track in your contact center. In the YourSite database, you must create an employee ID for each employee who works in your contact center. Employees can have multiple agent IDs, but only one employee ID. You can run reports on licensed employees only. The number of employees you license in YourSite Configuration must be consistent with your software license.

To view details on your software license

- Hover over **Help** and select **About your Mitel applications**.

ABOUT THIS USER GUIDE

This guide provides information on how to manage your contact center and instructions for employees and supervisors regarding daily use of MiContact Center Business desktop applications, including CCMWeb, Contact Center Client, Forecasting, Interactive Contact Center, Interactive Visual Queue, the MiCollab and Ignite integration, Contact Center Softphone, Contact Center PhoneSet Manager, Flexible Reporting, Workforce Scheduling, Schedule Adherence, and Employee Portal.

To report an issue with this document please email techpubs@mitel.com.

MiContact Center Business

This chapter describes

- The layout of the user guide
- Document conventions
- Where to find information and troubleshooting assistance

Contact Center Concepts

This chapter describes

- The basics of ACD
- The basics of ring group call distribution
- The inbound contact center environment
- How resources interact to process interactions

Contact Center Planning and Management

This chapter provides information on how to plan and manage your contact center, including how to

- Establish a corporate Service Level objective
- Collect data
- Forecast the Call Load
- Calculate the resources required
- Schedule agents
- Determine contact center costs

Getting Started

This chapter describes how to

- Specify user preferences in CCMWeb
- Configure email contacts in CCMWeb

Real-time monitors

This chapter describes how to

- View real-time agent and queue statistics on real-time monitors
- View and manage callbacks
- View ports
- View web pages
- View historical real-time events
- Configure alarms for agent and queue performance
- Customize monitor display characteristics
- Build marquee monitors and broadcast statistics and messages
- Chat online with co-workers and supervisors

Forecasting

This chapter describes how to

- Create forecasts
- Export forecasts to Excel and Workforce Scheduling

Interactive Contact Center

This chapter describes how to

- Control the availability of agents, queues, and extensions

Interactive Visual Queue

This chapter describes how to

- View calls within queues and move calls from busy queues to less active queues
- Call back abandoned callers

Contact Center PhoneSet Manager and Contact Center Softphone

This chapter describes how to

- Handle calls using Contact Center PhoneSet Manager, Contact Center Softphone, and Contact Center Client

MiCollab Client and Ignite integration

This chapter describes how to

- Use MiCollab Client with Ignite for voice handling

Flexible Reporting

This chapter describes how to

- Design your own report templates and customize existing reports

Workforce Scheduling

This chapter describes how to

- Schedule agents
- Measure employee adherence to schedules
- View and trade shifts online and request changes to schedules

SEARCHING FOR KEY WORDS AND TOPICS

You can search for content in this PDF by using the search function built into Adobe Acrobat or Reader. Consult your Adobe documentation for other search options.

To search for a key word or topic

1. In the open PDF, press **Ctrl+F**.
   Alternatively, right-click in the document and select Find.
2. Type the key word or topic for which you want to search.
3. Press **Enter**.
4. Navigate the results by clicking the **Next** or **Previous** buttons.

DOCUMENT CONVENTIONS

This document uses the following conventions.

UI syntax

The following terms apply to actions you perform on the user interface:

- *Click* precedes items you select with the mouse, such as buttons, menus, and items in list boxes.
- *Press* precedes items you use select on the keyboard.
- *Select* or *clear* precedes items you turn on or turn off, such as check boxes.
- *Select* precedes items you select in combo boxes (text boxes with attached list boxes).

For example

1. Click **OK.**
2. Press **Enter**.
3. Select the **Show Start page** check box.

Bold

Bold typeface designates paths you select in your root directory and items you click, press, type, or select.

For example

1. Click **OK**.
2. Delete **50** and type **60**.
3. Select the **Check database integrity** check box.

UI Menu items

UI menu items you select are separated by an arrow [=>]. For example, **File=>Open** tells you to select the **Open** submenu on the **File** menu.

Note

The word **NOTE:** designates essential user information.

LOCATING THE LATEST VERSION OF OUR GUIDES

The MiContact Center Business documentation library includes the following guides. The latest version of each guide is available from http://edocs.mitel.com.

- *MiContact Center Business User Guide*: provides information on the basics of contact center management, and descriptions for use of all agent and supervisor applications within the MiContact Center Business suite. This guide focuses on voice media.
- *MiContact Center Business Installation and Administration Guide*: provides instructions for:
    - Downloading, installing, registering, and configuring MiContact Center Business on the Enterprise Server and client computers
    - Upgrading from previous versions of MiContact Center Business
    - Installing and configuring MiContact Center Business at remote sites
    - Installing and deploying MiContact Center Business .ova files
    - All IVR Routing configuration
- *Multimedia Contact Center Installation and Deployment Guide*: is the primary source of information for contact centers using email, chat, SMS, or open media to communicate with customers. This guide describes how to:
    - Install, configure, and maintain a multimedia contact center
    - Use the tools required to manage a multimedia contact center
    - Handle customer interactions via voice, email, chat, SMS, and open media using Ignite
- *MiContact Center Business and MiVoice Analytics System Engineering Guide* discusses the following topics:
    - Deployment models based on licensing, contact volume, network requirements, and availability
    - Recommendations for collocating server applications
    - System requirements, including server and client hardware and software requirements, virtual application requirements, and multi-tenanting requirements
    - Server and client virtualization details and best practices
    - Performance and scalability details, including verified capacity results for all media types (alone and blended) and IVR Routing scalability and port sizing recommendations
    - Bandwidth and storage requirements
    - Licensing information
    - Support details for third-party integrations and internal products, such as Multimedia Contact Center and IVR Routing
- *MiContact Center Business—Reports Guide*: describes all of the report types available and explains how to generate, view, and share reports for the Contact Center licensing package.
- *MiContact Center Business - Workgroup Reports Guide*: describes all of the report types available and explains how to generate, view, and share reports for the Workgroup licensing package.
- *MiContact Center Business Deployment Guide*: discusses the following topics:
    - Contact center basics, with a focus on ACD routing functionality
    - Topologies for scaling

- ACD resiliency
- IVR Routing resiliency and redundancy
- Virtual contact centers
- *Contact Center Blueprint*: discusses the following topics:
  - MiContact Center Business topologies
  - MiContact Center Business deployment details
  - Cloud and hosted considerations
- *MiContact Center Business Site-Based Security (Multi-tenant) Administration Guide*: describes how to install and configure MiContact Center Business in a multi-tenant deployment.

TROUBLESHOOTING ASSISTANCE

For the latest frequently asked questions and troubleshooting information, see the Mitel Knowledge Base at Knowledge Management System available on MiAccess.mitel.com.

Chapter 2
CONTACT CENTER CONCEPTS

Automatic Call Distribution (ACD)

Ring Groups

Inbound call environment

CONTACT CENTER CONCEPTS

Contact centers process a high volume of contacts to meet marketing, sales, customer service, technical support, and other business objectives. A fine-tuned contact center distributes contacts efficiently and optimizes the use of agents and other resources. This section describes the inbound contact center environment and how resources interact to process voice contacts.

AUTOMATIC CALL DISTRIBUTION (ACD)

Automatic Call Distribution (ACD) is a specialized mechanism for distributing incoming calls. The primary goal of ACD is to ration calls to agents in a cost-effective manner that provides acceptable service to callers.

To optimize the use of agents, you cross-train them so they can handle a variety of inquiries. Rather than distributing calls to a number of small, specialized agent or extension groups, ACD distributes them efficiently among the entire pool of available agents. When you consolidate resources (use the Pooling Principle), the same number of contact center agents handle more calls while maintaining Service Levels.

Typically, you program ACD to ensure the first call to arrive reaches the first available agent or the agent who has been idle the longest. However, you can vary the order of calls and agents to provide superior service to preferred customers, and skills-based routing.

UNDERSTANDING ACD CALL FLOW

The path of an incoming call is as follows. A caller telephones your contact center via the Public Switched Telephone Network (PSTN). (The PSTN is a global collection of Central Offices (COs) interconnected by long-distance telephone switching systems.) The local CO directs the call to one of your trunk groups. An available trunk picks up the call. Typically, calls from the PSTN arrive to the contact center over incoming trunks and calls from the contact center to the PSTN travel over outgoing trunks. If no trunks are available, the call does not get through to the system (it is blocked) and the caller receives a busy signal.

When a trunk picks up a call, it forwards it through to a group of agents handling calls, or to some other answering point. The call arrives at the ACD queue of an agent group. The queue delays the call rather than blocking the call from entering the system. The length of time the caller waits in queue is the queue time. While waiting in queue, the caller listens to product features, announcements, or other messages provided by a Recorded Announcement Device (RAD). The caller can wait patiently in queue for an available agent, leave a voice mail message, or hang up (abandon) the call. (See Figure 1.)

An agent handles the call. The time the caller spends talking to the agent is the ACD Handling Time (including the hold time). If the agent calls the supervisor in search of more information (while the caller is on hold) and/or transfers or conferences the call, these times are added to the ACD Handling Time value.

For example, an agent speaks to a caller for two minutes and then puts the caller on hold for three minutes and tries to solve the problem. This may include a call to the supervisor. The agent then initiates a conference call with the caller and a third party and they speak for three minutes and resolve the issue. Therefore, the ACD Handling Time for the agent is 2 + 3 + 3 = 8 minutes.

When the call is completed, the agent might need to perform additional work associated with the call. The time taken to perform this work is the Wrap Up Time.
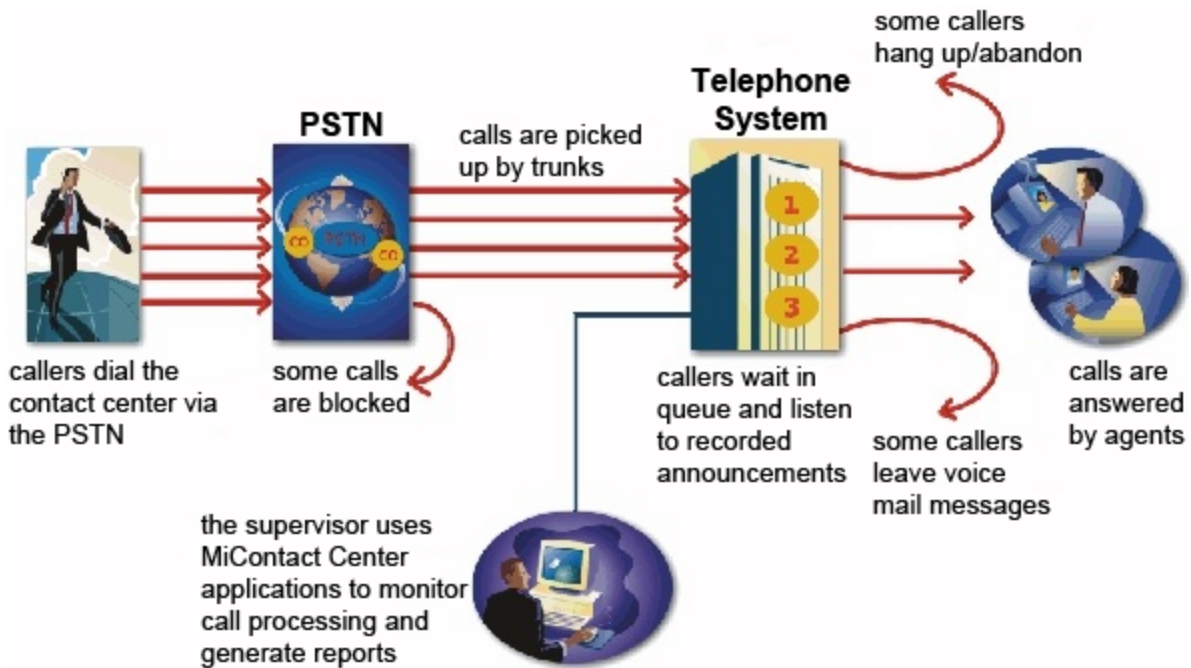
Figure 1: Call flow

Monitoring the call flow process

Second-by-second (real-time) statistics presented on wall signs and desktop monitors enable you to monitor the service provided to callers. You can monitor the number of incoming calls, the time it takes to process them, the queue load, and the availability of agents using a Management Information System (MIS). The MIS refers processes data produced by the telephone system. The MIS uses telephone system records to provide forecasting, real-time monitoring, and reporting functions.

Ensuring traffic-carrying efficiency

To optimize traffic-carrying efficiency ensure

- Sufficient trunks are available to carry incoming calls.
- Callers experience a delay in queue.
- There is a random distribution of calls among available agents.

Scheduling to optimize call flow

You schedule agents so the number of incoming calls at any given time typically exceeds the number of agents currently available. The intent is that callers experience a slight delay before agents answer their calls. The expected number of incoming calls forecasted for the time of day, and day of the week influence scheduling decisions.

Routing calls

Call routing options you program in the telephone system provide a set of instructions that automate the movement of calls to their intended answering points. You can define options—for example, if the caller dials 1, the system forwards the caller to customer service. You can specify re-routing for calls not answered after a set period of time and parse incoming Automatic Number Identification (ANI) and Dialed Number Identification Service (DNIS) data to direct call routing. (See Figure 2.)
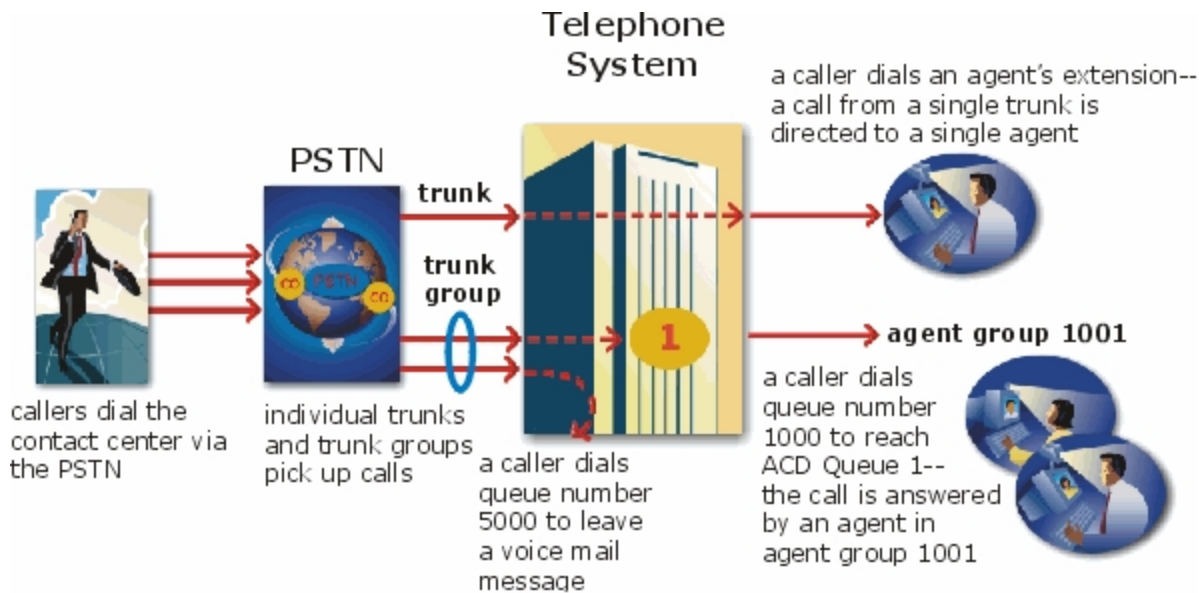
Figure 2: Call routing

Dialing an agent's extension

In the simplest call scenario, a single trunk picks up an incoming call to your contact center. The telephone system presents the caller with options to dial various answering points. The caller dials an individual agent at an extension through a queue number. A queue number is an address mechanism for a queue or other answering point. The programming associated with the queue number defines the routing and timing features of the call. The telephone system collects data on the agent and trunk involved in the call. The ACD management reporting application produces reports on agent and trunk activity.

Dialing a queue

In the next call scenario a trunk group picks up an incoming call to your contact center. The system presents the caller with options to dial various answering points. The caller dials queue number 1 to reach queue 1 (Customer Service). The system forwards the call to the first available agent in the agent or extension group associated with queue 1. The call is an ACD call because one dialable number represents all of the agents in the group. The telephone system collects data records for the call. The ACD management software produces Queue Reports on queue 1.

Overflowing calls

An ACD call that is not answered immediately is placed in a queue. If an agent does not pick up the call after a set amount of time (the overflow time) the system places the call in the queue of another agent group, in addition to keeping it in the first queue. The first available agent in either group handles the call. The overflow feature limits the delay faced by callers by queuing calls against two or more agent groups. (See Figure 3.)
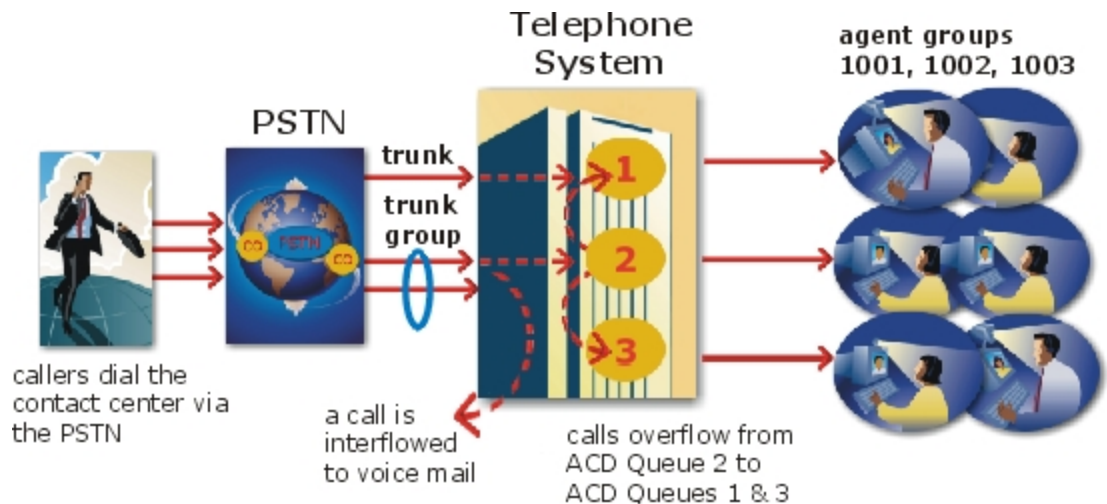
Figure 3: Multiple queue routing

Interflowing calls

You can program the ACD routing system to direct a queue delayed call to voice mail or to another answering point. The interflow timer runs independently of the overflow timer. If the interflow timer expires, the system removes the call from the queue and re-directs it to another answering point, such as a trunk or voice mail.

RING GROUPS

MiContact Center Business and MiVoice Analytics support Ring Groups. Ring Groups are a call distribution mechanism that offers an alternative to ACD for distributing calls in your business. While ACD is focused on rationing calls to pools of available agents, Ring Groups are configured to distribute calls to a pool of specific extensions. Users can configure Ring Groups within YourSite Explorer, monitor them in Contact Center Client, and report on them.

When an incoming call rings the Ring Group, the member extensions configured in the Ring Group are rung until one extension answers. Ring Groups can be programmed to offer calls to extensions using five different algorithms:

- **Ring All**: Rings all available extensions in the Ring Group simultaneously.
- **Terminal**: Starting from the first extension in the member list, rings the first available extension.
- **Terminal Cascade**: Starting from the first extension in the member list, rings the first available extension for the duration of the Cascade Ring Timer before calling the next available extension in the member list.

- **Circular**: Starting from the last member to handle a call, rings the next available extension in the members list
- **Circular Cascade**: Starting from the last member to handle a call, rings the next available extension in the member list for the duration of the Cascade Ring Time before calling the next available extension in the member list.

Ring Groups enable a business to ensure that in settings where employees may not have a set physical location or mobile device, such as a warehouse or back office, calls can be effectively distributed to an answering extension. Calls to Ring Groups can be ACD or Non ACD in MiContact Center Business real-time and reporting.

Incoming calls are handled differently than ACD path queues as well. If a call comes in, it will be queued if any one of the Ring Group's extensions are available. Available extensions are those that are:

- Idle
- Busy (ACD, Non ACD, or Out)

If the Ring Group's extensions are not available, the call is overflowed immediately (if an overflow point has been configured) or receives no answer. Extensions in the following states are not available:

- Do Not Disturb
- Out of Service
- Not Present
- Reseize Timer

For more information about extension states, see "Extension states" on page 55.

THE INBOUND CALL ENVIRONMENT

The inbound contact center environment has unique characteristics that must be considered in effective planning and management.

Predicting call arrivals

Calls arrive randomly to contact centers. You cannot predict the minute-to-minute arrival of calls. This results in unanticipated increases in workload, and impacts staffing calculations and the load carried by system and network resources.

You can predict the pattern of call arrivals for 15-minute or longer intervals. For example, you can predict that next Monday between 1:00 P.M. and 1:30 P.M. you will receive 60 phone calls. However, you cannot predict how many calls will arrive in the first five minutes, the second five minutes, and so on.

Understanding caller tolerance

Several factors influence a caller's tolerance to queue delays:

- The immediacy of the caller's requirement
- The availability of similar products or services
- The caller's expectations for service
- The time available to make the call
- Whether or not the caller is paying for the call

Chapter 3
CONTACT CENTER PLANNING AND MANAGEMENT

Establish a corporate service objective

Collect data

Forecast the Call Load

Calculate the resources required

Schedule agents

Determine contact center costs

CONTACT CENTER PLANNING AND MANAGEMENT

Effective contact center management involves having the right resources in place at the right times to handle an accurately forecasted workload at the desired level of service. Commitment to a systematic planning and management strategy is essential. The strategy is based on corporate objectives that you continually assess and refine.

Whether you are managing a start-up contact center or refining the performance of an existing operation, the process illustrated in Figure 4 applies. It is the basic framework for achieving and maintaining your service objectives.
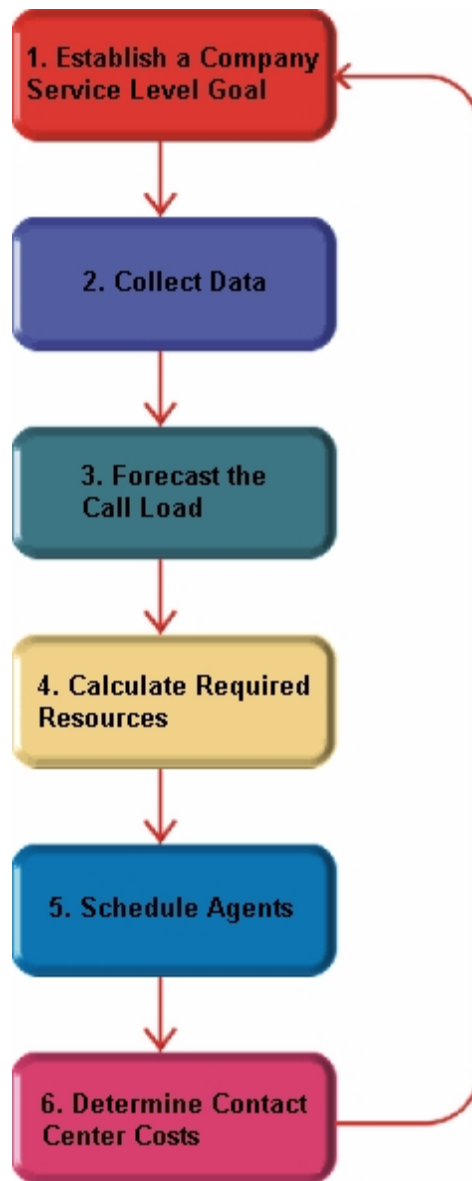
Figure 4: Planning cycle

The objective of contact center management is to find the right balance between the agents scheduled and the service provided to customers. This involves assessing and re-assessing trade-offs between the Service Level, agents scheduled, and average call duration for a known Call Load for each 15-minute or half-hour interval of the day. Collecting, properly interpreting, and applying ACD and other information allows you to accurately forecast the workload and schedule sufficient agents to meet your service objectives.

STEP #1 ESTABLISH A CORPORATE SERVICE OBJECTIVE

The Service Level % is a performance metric contact center managers use to determine what proportion of customers, who contact you by voice/email/chat, receive 'good' service. Using the Service Level %, you can gauge the level of service customer's experience, from a historical and a real-time perspective.

Defining and adequately funding a service objective should be closely tied to your corporate mission. The service objective identifies the average length of time a caller who has obtained a trunk waits for an available agent. It is the basis for planning and budgeting and links the resources you require to your service objectives. Choosing a service objective is the first step in a comprehensive planning and management solution. Once you set a service objective, you should routinely access it to see how consistently you are meeting it, on a 15-minute or half-hour basis.

Contact centers in different industries use different criteria for measuring service. Your service objective should reflect the type of service being provided and the expectations of callers seeking the service. For example, a company that sells magazine subscriptions has less to lose in the outcome of any one call than a car dealership does. A caller to a credit card 'lost or stolen' line might expect different service than a caller to a customer service department at a bank. Contact center metrics across industries are designed to reflect this.

Performance targets must suit the primary function of a contact center. In revenue-based contact centers where agents sell products or services, the net revenue per call is considered when defining a service objective. Revenue-based contact centers strive to provide a high level of service with minimal blocking and delays.

UNDERSTANDING THE SERVICE LEVEL

The Service Level applies to all of the media types (voice, email, chat, SMS, and open media).

The *Service Level* is expressed as *X percent of calls handled in Y seconds or less*, such as 80 percent of calls handled in less than 20 seconds. Why is Service Level the standard measurement of service? Service Level provides the most accurate representation of the callers' experience. It is ultimately the caller who decides what constitutes good service, and whether or not to end a call. It applies to inbound transactions that must be addressed as they arrive.

When a caller enters a queue, the call is processed in one of three ways:

- An agent answers the interaction (handled interaction).
- The client disconnects before an agent answers (abandoned interaction) (for calls and chats only).
- The interaction is removed from the queue, and sent to another handling point (for example, to voice mail, an automated attendant, or another queue), (Interflowed interaction).

For detailed information on Calls Offered, Calls Handled, Calls Abandoned, Calls Interflowed, and other Service Level parameters see "Choosing a Service Level goal" on page 21.

UNDERSTANDING WHY THE SERVICE LEVEL IS THE MOST MEANINGFUL STATISTIC

The Service Level is one of many ACD statistics used to measure performance. Each statistic has its purpose. For example, the *Grade of Service* (GOS) statistic relates the number of trunks to the level of traffic and indicates the likelihood an attempted call will receive a busy signal. It is expressed as a decimal fraction. For example, a GOS of P.02 means a caller will have a two percent chance of receiving a busy signal. Since trunk costs are insignificant compared to agent costs contact centers are well advised to schedule sufficient trunks, abandons should be minimal.

A *delayed call* is a call placed in the ACD queue because it cannot be answered immediately by an agent. The *probability of delay* statistic relates the number of agents or extensions to the level of traffic carried by the trunks and indicates the likelihood and amount of delay experienced. The GOS, probability of delay, and Quality of Service rendered by agents provide vital information about the callers' experience. (See Figure 5.)
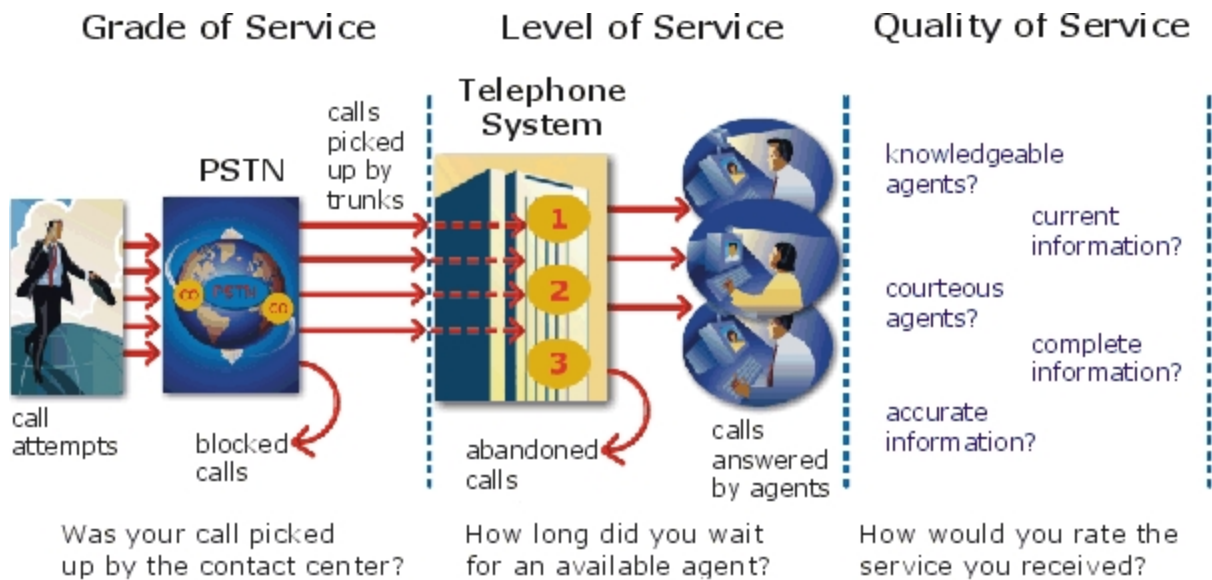
Figure 5: Service criteria

The GOS and probability of delay contribute to our understanding of what happens to the calls not answered in Y seconds, and give meaning to Service Level. Service Level is the primary statistic used in planning and budgeting because it is the most stable measurement of queue activity.

The following statistics are also meaningful contact center indicators:

ASA

The *Average Speed of Answer* (ASA) is an ACD statistic that measures how long the average caller waits on hold before the call is picked up by an agent. ASA is a valuable measure of service quality, but is often misinterpreted. The average does not represent what is typically experienced by individual callers. Most calls are answered by agents more quickly than the average, but a small percentage of callers wait several minutes in queue. ASA is a useful parameter, but Service Level is a more reliable indicator of what callers experience.

Abandonment

ACDs collect statistics on how long callers wait before abandoning calls, and what percentage of calls are abandoned. Unfortunately, *abandonment* is difficult to forecast because it is impossible to predict caller behavior with any reliability. Sometimes when the Service Level is high more callers abandon than expected. There are no industry standards for abandonment. It is a somewhat unreliable measure of contact center performance. However, abandonment statistics assist in planning Service Levels, and provide valuable information used to create in-queue and message-on-hold announcements.

CHOOSING A SERVICE LEVEL GOAL

Contrary to popular belief, there is no industry standard Service Level. Some contact centers base their Service Level goal on the targets of same-industry companies. In doing so, they assume these companies are actually meeting their intended targets. Companies are setting increasingly rigorous Service Level targets in sectors where outstanding customer service is the norm.

Setting an appropriate Service Level goal for your contact center is not easy. The motivation and expectations of your customers, the availability of similar goods or services, the Service Level targets of same-industry companies, and the value of calls are things to consider. It may be useful to run some calculations to determine the trade-offs in Service Level associated with adding or removing an agent, and implement customer satisfaction surveys. When defining your corporate Service Level, consider several factors and rate their relative importance.

An appropriate Service Level is one that

- Satisfies callers' expectations for service
- Keeps abandonment in check (at less than five percent)
- Minimizes expenses and maximizes revenue
- Meets with the approval and support of agents, supervisors, and senior management

Consider this modest objective. For a Service Level of 80 percent of calls answered in less than 20 seconds, callers receive the following service:

- Approximately 30 percent of callers experience a delay in queue.
- The longest wait time is approximately three minutes.
- The average speed of answer is approximately 12 seconds.

Is this acceptable service for you and for your callers?

UNDERSTANDING QUALITY OF SERVICE

Agent statistics reflect the time agents spend in various states and are used to assess agent performance. The average time an agent spends handling interactions, and in the Make Busy, Do Not Disturb, Unavailable, and Wrap Up states directly affects the agent's availability and the Service Level provided to callers.

Service Level alone does not ensure customer satisfaction. The quality of the interaction between the caller and agent leaves a lasting impression. *Quality of Service* reflects an agent's ability to provide excellent service to each customer. The knowledge of the agent, the accuracy and completeness of the information provided, and the courtesy extended to the caller contribute to the caller's experience.

MONITORING CALL HANDLING TECHNIQUES

Silent monitoring systems complement ACD statistics by providing a snapshot of quality and productivity in your contact center. You can track call handling techniques and determine where improvements can be made in individual performance. Advanced systems capture the voice interactions between agents and callers and record agent data tables for a complete picture of call handling. They provide online evaluation forms so you can annotate recordings with feedback.

Silent monitoring takes the bias out of performance evaluation. Silent monitoring provides a systematic process for monitoring and grading agent calls. You can schedule sessions across different times of the day, days of the week, and evaluators promoting fairness and consistency. Showing agents where improvement is needed is more effective than just telling them. Silent monitoring can contribute to a reduction in call time, a reduction in monitoring time and personnel, and increased training efficiency.

You can use pre-recorded interactions between agents and customers to train agents and for ongoing evaluation.

You can use the information to

- Provide recorded examples of exceptional service and unacceptable service to agents in training.
- Record, review, annotate with feedback, and forward call records to agents who then review your comments within the context of the actual call.
- Calibrate and routinely access the scoring consistency of call monitors.
- Assess the effectiveness of current training programs.
- Assess the efficiency of the monitoring and assessment process.

Defining scoring parameters

The parameters used to evaluate how well agents handle calls are based on the purpose of the calls. Goals vary across calls for inbound and outbound services. For example, in an outbound sales environment quality may be based on whether or not the agent made the sale, took advantage of cross-sell opportunities, and adhered to a pre-defined script. In an inbound environment quality may be based on the completeness and accuracy of the information and whether or not the caller's questions were answered satisfactorily. Agents are also evaluated on 'soft skills', such as voice quality, pausing at regular intervals, rate of speech, use of positive language, and other listening and communication skills.

Setting performance standards and goals

Once you determine appropriate scoring parameters, you define standards for exceptional and acceptable levels of performance. Assessment standards are based on consensus and must be clearly defined and communicated to monitors and agents. Collaborate with agents in setting performance goals and clearly define exceptional service and interim performance steps. Determine a baseline of current performance and set performance steps for an agent group. Provide agents in the group who meet or exceed the interim target with rewards and recognition commensurate with their performance. When systematically used in training and coaching recorded sessions positively impact productivity. Fair assessment is good for moral and motivation, and contributes to an environment in which agents can learn and grow.

Monitoring frequency

The frequency of monitoring sessions is determined by individual companies and ranges from once a month to 15 or 20 sessions a month. Implementing five to 10 monitoring sessions per month is common practice. Trainees and agents with consistently low scores are monitored more frequently than other agents. Resource limitations typically influence the frequency of monitoring.

MONITORING SYSTEMS AND TOOLS

The following monitoring systems and tools help you evaluate the performance and manage the quality of service of your contact center.

Silent monitoring systems

Silent monitoring systems range from tape recorders to client/server based recording systems. Advanced systems schedule, record, and store voice files in a compressed digital format using a real-time link to your telephone system. They capture any data tables accessed by the agent in addition to voice data. Silences are eliminated to optimize monitoring efficiency. Recording sessions can be played back from any telephone, anywhere, at any time. You can customize agent evaluation forms and define parameters for quality with advanced systems. They provide activity, status, and management reports for evaluating agents and observation practices.

IT support systems

Information Technology (IT) support systems are commonplace in contact centers. Contact center agents divide their time between listening to customer requests, entering and updating customer information and other entries, searching for required information, and providing feedback to customers. In order to provide prompt and complete information, agents must have immediate online access to information including customer records and case histories, products and services, and company policies and procedures.

The push to increase agent efficiency and customer service has placed new demands on computer information systems and information technology. Information products that enhance agent productivity are continually being developed. Contact center systems are designed to incorporate some, or all of the following specialized support functions.

CTI

Computer telephony integration (CTI) is the merging of computers and telephone systems. Today's computer-based telephone systems deliver synchronized voice and data, voice and data conferencing, automatic information retrieval for calls, caller-based messaging and routing, and desktop productivity tools. You can use customer databases in call handling to enhance customer service and agent productivity. When databases are shared between contact center departments each agent can access a caller's contact information, purchasing records, call history, and preferences by a caller ID number.

ANI

Automatic Number Identification (ANI) identifies the telephone numbers of callers to your contact center*, so* agents can receive screen pops with calls. You can connect a database to your telephone system to simultaneously send calls and caller information. The telephone system forwards the caller's telephone number to a software application that relays database records on the caller to the agent. Alternately, the caller enters an ID number that the database associates with a set of records for the caller and the agent is sent the information.

ANI saves agents time since they do not have to ask for and enter a name for a caller, and wait for the database to respond. This time savings significantly impacts staffing requirements and telephone service charges. ANI also identifies telephone numbers of callers who abandon calls so they can be contacted later for potential business.

Reports can identify the volume of usage and costs of internal line numbers, and help you track the long distance distribution per line number and maximize long distance efficiency.

DNIS

Dialed Number Identification Service (DNIS) is a feature of toll-free lines that identifies the telephone number the caller dials. This assists agents who handle calls for more than one business or product line. Each business or product line has its own toll-free number. When a caller dials a toll-free number, the telephone system forwards information to the agent so the agent can identify who the caller dialed. For example, a caller dials a toll-free number for a cruise line. The telephone system sends a script to the agent along with the call. The agent then knows to answer 'Good morning. Thank you for calling Southern Cruises', instead of the name of another cruise line serviced by the center.

AUTOMATING HELP DESK WORKFLOW

Agents at IT help desks require quick access to customer information and call history, and the ability to rapidly log all of the support calls and incidents. Advanced help desk packages offer automated desk help workflow systems. They assist agents in logging service requests (tickets), dispatching them to prioritized queues or agents, tracking them, and documenting activities.

External applications, help desk operators, or end users (in web-based applications) generate tickets. The system generates them manually, or in some cases automatically, in response to system events. It can correlate multiple incidents with single tickets, and multiple problems with a single call.

Automated help desk workflow systems track each step taken in answering a call, with automatic time stamping of all of the referrals, escalations, reminders, alerts, and email notifications. Calls are prioritized and referred to other departments without reassignment, reassigned (escalated) to other

technicians or specialized staff, and placed in an alert condition when they are not resolved promptly. Activities are date and time stamped automatically. Most help desks offer outgoing email notification and paging. Some help desks offer automated logging of incoming emails, and automated call acknowledgment emails to clients.

STEP #2 COLLECT DATA

Telephone systems generate an enormous amount of real-time and historical data used in planning and management of your contact center. You use real-time data to monitor the current Call Load and agent availability so minute-to-minute adjustments can be made. You use historical information in forecasting, staffing, and scheduling. Other critical management information comes from customer surveys, market studies, employees, external departments, telephone networks, workforce management systems, competitors, and the media. Data collection is a continuous process you implement as soon as your telephone system is up and running.

Telephone systems provide detailed report data on every aspect of call transactions. You can program computer-based telephone systems connected to a Local Area Network (LAN). Users on the LAN can view or print real-time and historical reports. Using web-enabled telephone systems, you can view and generate reports in a Web browser. You can monitor contact center activities remotely, and distribute reports to people on different networks.

COLLECTING DATA ON CALL HANDLING

Contact center reporting software displays real-time telephone system data on desktop monitors and wall signs. Using real-time data, you can manage current conditions and ensure agents respond to changing contact center events. The telephone system provides information on call activity, agent activity, and queue activity.

You can use historical data in forecasting and in assessing the performance of your resources. Historical reports provide vital information on load activity, resource activity, and queue activity. For example, resource activity reports on trunks can tell you the highest number of trunks used during peak traffic periods, and the total duration of calls handled by each trunk for the reporting period. You can determine how busy your trunks are, and whether or not you have the right number of trunks scheduled.

CTI provides in-depth information on call transactions. Detailed information on keystroke sequences, databases searched on, and on-screen assistance provides a clear picture of agent activities. Using ANI data, you can identify callers by area code and collate information on demographic trends in caller behavior.

Workforce management systems use telephone system data to forecast and schedule agents. Some packages monitor the real-time adherence of agents to scheduled activities, so you know the number of agents currently logged on and available to handle calls. Workforce management systems collect and store real-time adherence data. This data provides a historical account of adherence used in agent assessment.

Customer surveys provide valuable supporting information on callers' tolerance to delay, and expectations for service. They address some of the following questions: Was the agent accessible? Was the caller put on hold for too long? Was the agent courteous and responsive to my request? Was the agent well informed? Did the agent provide the correct information and keep commitments?

Contact centers use this information to estimate the repercussions of poor service: escalated costs, duplication of work, lost customers.

As the economy moves towards individual, personalized services, new ways of handing calls continue to emerge. These new features add to the complexity of collecting and measuring information. It is vital you establish an integrated, reliable system for measuring the key indicators of performance: the efficiency of call handling, the service callers experience, and their perceptions of that service.

STEP #3 FORECAST THE CALL LOAD

Finding the right balance between resources and traffic volumes is a critical step in effective contact center management. Estimating resource requirements is particularly challenging as the number of calls and the total duration of calls expected for a given time interval is difficult to predict.

Forecasting impacts contact center operations and performance in the following ways:

- The number of blocked and abandoned calls
- The level of service provided to callers and callers' perception of service
- Agent workload, call behavior, and retention
- The accuracy and usefulness of schedules
- The success of periodic sales campaigns

FORECASTING ACCURATELY

Forecasting is an imprecise science. The accuracy of your forecast increases markedly with the size of your data sample. You take a year (or preferably two or three years) of ACD queue traffic data, examine trends in Call Load patterns, break down the information, and determine the ACD Handling Times of the calls. You then modify the forecast based on current contact center activities and other considerations, such as absenteeism, agent breaks, holidays, and training.

The range of forecast dates you specify depends on the purpose of the forecast. Using long-term forecasts, you can estimate future budgets and expansion opportunities, and establish corporate objectives. Using short-term forecasts (of one to three months) you can determine seasonal staffing requirements, plan for short-term sales campaigns, and assess upcoming hiring needs. You can use weekly, daily, hourly and half-hour forecasts to tweak agent schedules and adjust for absenteeism.

CONDUCTING FORECASTS

Conducting a forecast involves accurately estimating the three components of Call Load: the ACD Handling Time, Wrap Up Time, and Calls Offered. After you run a forecast, it is useful to examine the data and make adjustments based on present contact center conditions. You tweak the forecast by adding or reducing calls based on your intuition and on information gathered by yourself and others.

To forecast the agent requirement, you

1. Examine trends in Call Load patterns.
2. Break the information down in to monthly, weekly, daily, half-hour, and 15-minute intervals that reflect Call Load patterns.
3. Determine the handling times of calls.
4. Modify the forecast based on current contact center activities and other considerations, such as absenteeism, agent breaks, holidays, and training.

You may need to consider the following issues: hardware or software system changes, expected callers, advertising and media, changes to your products, services, or pricing, new products, product performance, competitors' actions, and international, national, and corporate events. It is vital to have a systematic forecasting process in place that all of the departments support. For detailed information on Call Load, ACD Handling time, Wrap Up Time parameters, see "Forecasting terms" on page 134.

STEP #4 CALCULATE THE RESOURCES REQUIRED

You calculate the agent requirement in conjunction with the trunking requirement. The number of available agents affects the likelihood and length of delay experienced by callers. The delay affects the load trunks must carry. Because the number of available agents impacts the number of trunks required, you calculate the agent requirement first.

The Erlang C formula uses your historical Call Load and Average Talk Time data to predict the agent requirement for the time interval and date range in the forecast. The resultant spreadsheet displays the Call Load and agents required across time intervals.

PREDICTING AGENT REQUIREMENTS

Agent costs account for over 60 percent of all of the contact center costs. Accurately predicting the agent requirement, making the most effective use of agents, and standardizing and monitoring agent activities are paramount to achieving your service objectives. Agents are your most valuable resource: make team building and team management a high priority.

You can predict the agent requirement for your Service Level Percentage and Service Level Time targets by applying the Erlang C equation to the estimated Call Load and Average Talk Time.

UNDERSTANDING ERLANG C

Staffing models consider important factors unique to the inbound contact center environment:

- Call arrival is random.
- Consolidating resources allows the same number of contact center agents to handle more calls while maintaining Service Levels.
- Maintaining high Service Level targets requires staffing a large number of agents that will be idle a significant portion of the day.

The industry standard Erlang C equation operates on these principals. Most contact center reporting packages use Erlang C. An Erlang measures telephone traffic, or the flow of calls and call attempts to your contact center during a given period. One Erlang equals one hour or 60 x 60 = 3,600 seconds

of telephone interaction. This could be one call lasting one hour, six calls lasting 10 minutes, or any combination of calls and call durations that equal 60 minutes. The Erlang formulas provide a mathematical basis for making predictions about randomly arriving workloads.

Agent and delay calculations use the Erlang C equation. It predicts the resources required to keep delay times within your Service Level objective. Three variables influence the delay time: the number of agents, the number of waiting callers, and the average time it takes to handle each call.

Limitations of Erlang C

Erlang C has fundamental principles that do not reflect real-world circumstances. It assumes all of the calls reach the contact center and all of the callers wait indefinitely to reach agents. Because Erlang C assumes no blocking or abandons, it may overestimate the agents you need. Erlang C requires accurate information on call flow where voice messaging and call overflow are employed, assumes your Call Load prediction is extremely accurate, and assumes you have the same number of agents handling calls the entire half hour.

Although Erlang C has its limitations, it is the preferred planning tool as it provides reasonable traffic estimates for contact centers that maintain good service-and few abandons.

Considerations when predicting resource requirements

Erlang C provides theoretical numbers for staffing that you need to assess in light of the following contact center realities:

- The contact center blocks a certain proportion of calls and some callers abandon their calls.
- Talk time is unpredictable, and although most calls may last two to three minutes, a few calls can last upwards of an hour.
- Agents in training may require more time to process calls.
- Agents may use wrap up (after-call paperwork) time inconsistently during busy periods.
- Not all of the agents within an agent group are available at all times to handle calls offered to the agent group.

Erlang C predicts staffing needs fairly accurately. However, contact centers that use skills-based routing, overflow, interflow, and advanced routing options need to use intuition and experience in adjusting the final numbers.

The Erlang C formula uses your historical Call Load and Average Talk Time data to predict the agent requirement for the time interval and date range in the forecast. The resultant spreadsheet displays the Call Load and agents required across time intervals.

PERFORMING 'WHAT-IF' SCENARIOS

After you run a forecast, you can perform 'what-if' scenarios on the resultant data by changing the value of forecast parameters and recalculating the results. You can enter values for the ACD Calls Offered, average ACD Handling Time, Wrap Up Time, and Service Level Percent and Time and recalculate the number of agents required. For example, you can reduce the average handling time and recalculate the agents required and the calls handled across 15-minute time intervals for the shift.

UNDERSTANDING THE RELATIONSHIP BETWEEN AGENTS AND TRUNKS

You are already familiar with the terms GOS (probability of blockage) and Service Level (average wait time).

The following definitions are essential to understanding the relationship between agents and trunks.

Delay

Trunk calculations assume no queuing. For trunk calculations, the *delay* includes the time from when a trunk picks up a call until an agent answers it.

Agent Load

The *Agent Load* includes the ACD Handling Time and Wrap Up Time.

Trunk Load

The *Trunk Load* includes the time from when a trunk picks up a call until the agent finishes speaking to the caller and disconnects. The Trunk Load does not include Wrap Up Time.

Callers expect to have a 95 percent or better chance of obtaining a free trunk in to your contact center, and expect to connect to an agent within a reasonable amount of time. There must be sufficient trunks available to pick up calls, and sufficient agents available to handle the level of traffic carried by the trunks. The more agents handling a given Call Load, the less delay callers' experience. Callers experience a delay if there are insufficient agents available. If the delay is considerable, calls back up and some calls do not reach the contact center.

Traffic engineering involves estimating the number of trunks and amount of communications equipment needed to service an anticipated number of callers. It revolves around basic questions concerning the relationships between service parameters and trunk and agent resources. How much traffic can a particular number of trunks handle for a particular GOS? What is the GOS for a particular number of trunks and traffic level? How many trunks are required to handle a particular traffic level and GOS? What is the probability of delay and length of delay experienced for a particular traffic level and number of agents? How many agents are required to handle a particular traffic level for a given set of delay characteristics?

UNDERSTANDING ERLANG B

Contact centers use the Erlang B equation to estimate the number of trunks required. Erlang B assumes calls are not queued and that callers who receive a busy signal do not attempt to call again. It can underestimate the trunks required. One Erlang equals one hour or 60 x 60 = 3,600 seconds of telephone interaction.

Predicting your trunk requirement involves

- Determining your Busy Hour Traffic (*BHT*)
- Deciding how many blocked calls you can tolerate, or Grade of Service (*GOS*)

BHT

The *Busy Hour Traffic* (BHT) statistic, measured in Erlangs, is the number of hours of call traffic (or trunk traffic) you experience during the busiest hour of operation. It is important that your busy hour figure represent the busiest Call Load your trunks will ever receive, and not just today's peak traffic. BHT is the *(average call duration + average delay) x calls per hour ÷ 3600*. This value represents the highest Trunk Load (occupancy) in hours.

The *call center traffic* is the average number of trunks busy during the hour in question. One Erlang equals one hour, or 60 x 60 = 3,600 seconds of telephone interaction. If a contact center experiences 6.12 erlangs (or 6.12 hours of telephone interaction) during an hour, an average of six trunks were busy.

GOS

The *Grade of Service* (GOS) value is a decimal fraction. A GOS of P.02 means a caller has a two percent chance of receiving a busy signal. Contact centers use GOS in calculating the number of trunks required. It is important to specify a GOS that is right for you in order for the trunk calculation to be realistic.

PREDICTING TRUNK REQUIREMENTS

The number of trunks you require reflects the level of traffic expected during your busiest hour of operation. The busy hour is the hour during the workday in which a trunk group carries the most traffic. You calculate the Trunk Load after you forecast the Call Load for the busiest hour and determine the number of agents required to handle the Call Load for your Service Level objective.

Traffic calculators used to predict contact center resource requirements are available on the Web from companies such as erlang.com. You can obtain basic calculators at no cost. Calculators that display and print results or calculations made during the previous week are available at a modest cost.

To calculate the trunks required you simply input two of the figures and calculate the third. For example, if you know that your Busy Hour Traffic is 10 erlangs and you want to determine how many trunks are required when two calls are blocked in every 100 call attempts, you input the busy hour time (10) and your target rate of blocking (0.02). The calculator displays a value for the trunks required (17).

Figure 6 illustrates the trunks required across a spectrum of GOS values. Whether you chose a GOS of 0.01, 0.05, or somewhere in between these values reflects how may calls per 100 call attempts you can afford to lose. In revenue-based contact centers minimal blocking and delay is a priority.
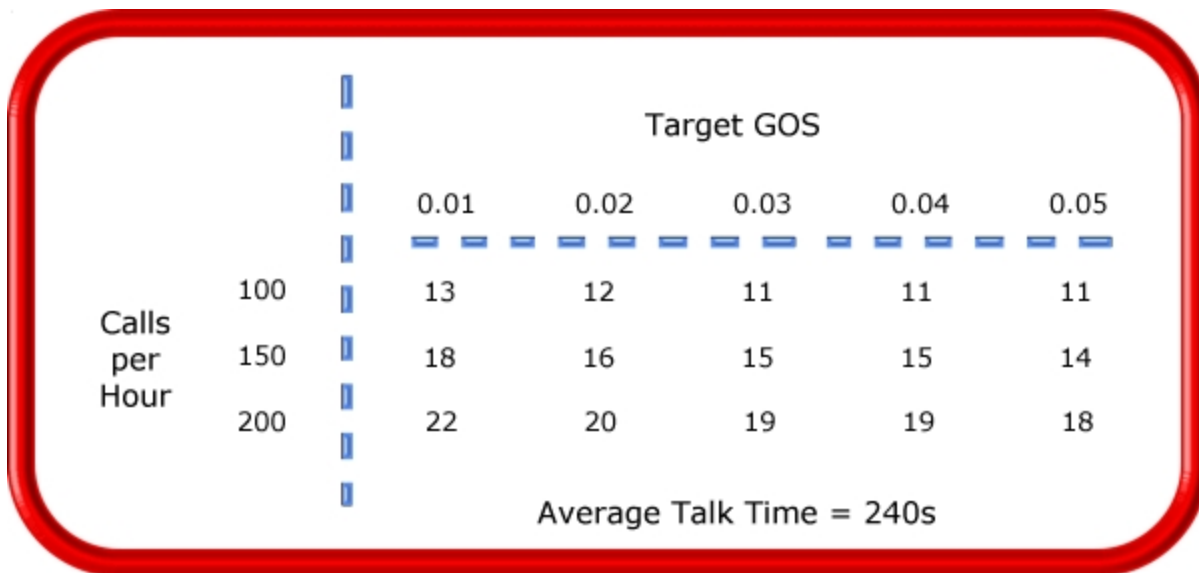
Figure 6: Estimating the trunk requirement

Although some contact centers base the trunk requirement on a staff-to-trunk ratio, such as 1.5 trunks per agent, many use the Erlang B equation. Whatever ratio results will be the right one for you.

It is better to slightly overestimate than slightly underestimate the number of trunks required: trunks are inexpensive, compared to agent costs. You can always cancel a trunk if periodic Trunk Load calculations show low occupancy on the trunk.

No staffing approach is absolute. You need to acknowledge the assumptions implicit in your calculations and use common sense when estimating your resource requirements. When you schedule resources, they must be closely monitored to ensure you are making full use of them.

STEP #5 SCHEDULE AGENTS

Scheduling involves accurately forecasting the workload and determining which agents should work which shifts. This has traditionally been a labor-intensive manual process for contact center supervisors. You can schedule agents for breaks, split shifts, ACD and Non ACD work periods, repeating work patterns, holidays, and on call work. You can categorize agents by pay level, overtime eligibility, skill level, employment status (part time or full time), and scheduling preferences. Matching these shift and agent variables to the anticipated workload, and re-allocating agents in response to employee absenteeism can be a daunting task.

Scheduling is becoming increasingly challenging, as contact centers support a wider range of products and services, and agents require more frequent and specialized training. Advances in technology have automated many agent tasks and have resulted in more varied and challenging calls and responsibilities.

Accurately forecasting and building schedules that reflect the workload as it changes across intervals for days of the week, weeks of the month, and seasons of the year is essential in meeting your service objectives. You need a schedule that accurately matches agents to the anticipated workload and agents who aspire to adhere to the activities scheduled.

You can track the availability and activities of agents throughout the day and verify agents are performing the duties for which they are scheduled. Not adhering to the schedule, such as forgetting to log out for a break, or performing Non ACD work when scheduled to perform ACD work adversely affects your Service Level and the moral of other agents who must compensate for the unavailable agent.

UNDERSTANDING THE SHRINKAGE FACTOR

Accurately forecasting the workload and scheduling agents to satisfy your Service Level objective is a good start, but does not account for the activities that prevent agents from sitting at their desks and handling telephones.

Agents scheduled for ACD work can be involved in some of the following activities:

- On a bathroom break
- Making or receiving personal calls
- Conferring with the supervisor or another agent
- On the phone with other departments
- Sending emails
- Involved in a lengthy, difficult call
- Prolonged in after-call work
- Absent due to illness or compassionate leave

To account for short-term or daily unscheduled absences, you can calculate the rostered staff factor (Shrinkage Factor). The *Shrinkage Factor* is a numerical value that defines the percentage of time agents are scheduled to work but are unavailable to handle calls. It tells you the number of agents you must schedule in addition to the base number of agents required to meet your Service Level.

CALCULATING THE SHRINKAGE FACTOR

You calculate the Shrinkage Factor for one or more agent groups as follows:

1. Determine the base staff forecasted by hour or half hour for the day.
2. Make a list of activities that prevent ACD agents from handling calls.
3. Add the base staff to the number of agents who are unavailable to handle calls because they are absent, on break, at an unanticipated meeting, etcetera.
4. Calculate the Shrinkage Factor for each time interval by dividing the scheduled staff by the base staff required to handle telephones.
   The result is a set of Shrinkage Factors that represent the expected shrinkage by half hour.
   See Figure 7.

	Base Staff Required on Phones		Break	Absent	Research & Unscheduled Non-ACD Work		Scheduled	Shrink Factor
13:00 - 13:30	50		12	5	4		71	1.1
13:30 - 14:00	54		0	5	7		66	1.22
14:00 - 14:30	48		8	5	3		64	1.33

$$\text{Shrink Factor} = \frac{\text{Scheduled Staff}}{\text{On Phone Agents}}$$

Figure 7: Calculating the Shrinkage Factor

You multiply shrinkage values against the base staff required on telephones when setting future schedules. If your agent requirements vary considerably on certain days of the week, you can calculate a separate set of Shrinkage Factors for these days. You must use your good judgment in identifying absences that are relevant to include in your Shrinkage Factor calculations. Anticipating higher absenteeism on Fridays and Mondays is a safe bet while factoring in daily compassionate leave is not. As with all of the steps in contact center planning, routinely assess the accuracy of your shrinkage predictions and adjust them as required.

OPTIMIZING SCHEDULES

Now that you have adjusted your agent requirement to account for unanticipated absences, the next step is to design a schedule that makes the most of your resources.

The following examples illustrate ways to adequately staff a contact center without having agents sit idle during slower periods.

Scheduling split shifts

Although not everyone likes to take a long break in the middle of a shift, for some agents split shifts fit well with priorities outside of work. For contact centers that experience heavy call traffic in the morning and evening, split shifts prevent overstaffing during these periods.

Staggering shifts

Staggering shifts allows you to maintain staffing levels over busy periods or periods when agents are on breaks. For example, one set of agents could start at 8:00 A.M., a second group at 9:00 A.M., and a third group at 10:00 A.M. so the contact center is fully staffed when it starts getting busy mid-morning. Alternately, you could schedule morning and afternoon shifts that overlap from noon until 1:00 P.M. to enable the morning shift to break for lunch while the afternoon shift handles calls.

Staggering breaks

Making slight adjustments to the timing of morning, lunch, and afternoon breaks has a tremendous effect on call handling. The Erlang C equation predicts 28 agents can handle 300 calls, each lasting 280 seconds and delayed 20 seconds. (See Figure 8.)

Figure 8 illustrates that changing the availability by one agent decreases the average delay time by five seconds, and allows the contact center to handle 16 additional calls.

Calls Handled		Call Duration	Average Delay		Required Agents
300		280s	20s		28
300		280s	15s		29
316		280s	20s		29

Figure 8: Staggering breaks to optimize call handling

Forecasting Non ACD work

Not all of the Non ACD work must be performed immediately. For example, call-backs to clients, emails, and discussions with staff and supervisors can sometimes wait until less busy periods. Forecast and schedule Non ACD work for slow times to ensure sufficient agents are available during peak periods. Set availability priorities and regularly communicate them to agents.

Scheduling part-time agents and agents on call

When practical, scheduling part-time agents and agents on call can be an effective strategy for topping up your pool of available agents. Scheduling agents on call is particularly useful for days of the week and seasons when absenteeism is noticeably higher.

ROUTING CALLS TO OPTIMIZE COVERAGE

To optimize service, you can use the following routing strategies that involve resources outside of the target agent group.

Overflowing calls to less busy agent groups

You can overflow calls from busy agent groups to less busy agent groups during peak periods. You can route calls to agents who primarily perform Non ACD work but act as reinforcements during busy periods, and to supervisors.

Employing call-back messaging

You can program the ACD to forward calls to voice mail so callers can leave messages instead of waiting for live agents. Call-back messaging helps to balance agent workloads between peak call periods and slow periods.

Contracting calls to customer care bureaus

Contracting calls is a growing industry. During peak periods, you can route simple, routine calls externally to customer care bureaus. Service bureaus collaborate with contact centers to set up scheduling and monitoring practices, and train agents to handle calls that vary in complexity.

Employing ACD enterprise call routing

Contact centers that provide extended, or around-the-clock service, can interflow calls to other sites. For example, you can interflow mid-day calls received by a busy center in San Francisco to agents working the late-afternoon shift at a center in Philadelphia. This optimizes call handling without scheduling additional agents.

SCHEDULING CONSIDERATIONS

Scheduling should be a collaborative effort. Agents have schedule preferences, and want to know when they are working well in advance. Agents are more likely to adhere to schedules if they are involved in defining the conditions of schedule adherence and non-adherence, and in other areas of the planning process.

Producing long-term schedules is less efficient than producing monthly schedules, as contact center conditions and agent availability are continually changing. Short-term scheduling is more accurate, but less popular with agents. It is important to find a good balance.

Measuring scheduling accuracy

You can measure the effectiveness of your scheduling process. Create a line graph of the Service Level for each half-hour interval for each day over the past week. Draw a horizontal line across the graph to indicate your service objective. Look for inconsistencies in the service provided for different time intervals across days, and how far you stray from your service objective.

If the Service Level is erratic, you may have enough resources in place, but they may not be consistently available to handle calls. If the Service Level is inconsistent at certain time intervals across the week, or you are not meeting your Service Level objective, investigate to see if you are adequately staffed at these times and are making the best use of resources. Try to assess how consistently the agents are responding to real-time information displays. Determine if they are restricting Non ACD activities to slow periods and adhering to the schedule.

Scheduling agents with workforce management tools

Workforce management tools assist you in scheduling agents for work and holiday periods. Many packages offer an integrated forecasting component that uses historical data to partially automate the scheduling process for established agents. Scheduling is not entirely automated: you must tweak agent schedules and enter shift and agent variables for agents manually.

STEP #6 DETERMINE CONTACT CENTER COSTS

An effective budget conveys what is currently happening in the contact center, projections for the upcoming year, and business objectives. It is important to highlight the trade-offs between the service provided to callers and costs to the organization by developing at least two budgets that reflect different scenarios.

You need to provide a clear indication of how the money is being spent, what you are doing to reduce or curb spending, and what equipment is required to meet service objectives and expected growth over the next year. Budgeting is on-going process that needs continuous refinement.

BREAKING DOWN EXPENSES

The costs associated with contact center operations include

- **Loaded labor costs**
  Loaded labor costs include wages, fringe benefits, and facilities, and account for over 60 percent of contact center costs. This is a significant cost and underlines the importance of accurate forecasting and scheduling.

- **Equipment and automation costs**
  Equipment and automation costs include the cost of the telephone system, computer systems, and furniture, and account for about five percent of total expenses.

- **Transmission costs**
  Transmission costs include costs incurred for voice (telephone lines) and data transmission, and account for 25 to 30 percent of contact center costs. Transmission costs have decreased considerably in the past few years and are continuing to drop. In revenue-based contact centers, toll-free lines cost approximately 15 cents per minute, or nine dollars per hour, per line.

The following statistics help you breakdown and analyze your contact center costs:

- **Cost of Delay**
  When insufficient agents are available to handle a given Call Load, the delay increases as does the Trunk Load. Calls are queued. For toll-free services each call delayed in queue is a cost to the organization. You are charged for the toll-free service from the time a trunk picks up a call until an agent completes the call and hangs up. The expense of queuing callers is known as the *Cost of Delay*. Staffing affects toll-free service costs: if insufficient agents are available and the Service Level is continually low, network costs will be high. You need to consider the Cost of Delay when estimating the agent requirement, and closely monitor it.

- **Cost per Call**
  You use a cost-per-call analysis to measure contact center profitability and performance. The *cost per call* measures labor, communication, and equipment costs against the revenue generated. You calculate it by dividing the total cost by the total calls for a particular period of time.

- **Average Call Value**
  You use the *Average Call Value* in revenue-based contact centers. You calculate it by dividing the total revenue by the number of calls received for a given period. Sales and reservations environments use the Average Call Value. The value of each call is balanced against the service provided to customers.

ANTICIPATING GROWTH

Predicting company growth is a challenging and essential aspect of contact center costing. Growth predictions impact budgeting considerations and must be clearly communicated to senior management. It is useful to map out your projected costs and time frames for the upcoming year and substantiate them with statistics and graphs. Determine when and how many resources you require, and lead-time issues.

Chapter 4
GETTING STARTED

Setting up user preferences

GETTING STARTED

After MiContact Center Business has been installed on the Enterprise Server and clients, you can launch CCMWeb and configure user preferences and email contacts. All other client configuration is done at the administrative level and described in the *MiContact Center Business Installation and Administration Guide.*

SETTING UP USER PREFERENCES

You can change your preferences at any time. They are found in CCMWeb under My options. From this menu, you can:

- Specify your language preference
- Change your password
- View your security role properties
- Configure email contacts

SPECIFYING YOUR LANGUAGE PREFERENCE

NOTE: MiContact Center Business applications, such as YourSite Explorer and Contact Center Client, all leverage the language settings of the operating system in addition to the language preference set for MiContact Center Business. Ensure that if you adjust the language settings of MiContact Center Business, you also adjust the language settings of your operating system to match.

To specify your language preference

1. Hover over **My options** and select **My preferences**.
2. After **Display this language,** select a language.
3. Click **Save.**

CHANGING YOUR PASSWORD

To change the password for your login

1. Hover over **My options** and select **My password**.
2. After **Old password**, type your old password.
3. After **New password**, type your new password.
4. After **Confirm new password**, type your new password.
5. Click **Save.**

VIEWING SECURITY ROLE PROPERTIES

You can view your security role properties. They describe the application areas which you can access. Only employees with access to YourSite Explorer and whose security role permits managing security can change the security role properties of employees.

To view the security role properties associated with your login ID

- Hover over **My options** and select **My security role**.

CONFIGURING EMAIL CONTACTS

You can create a list of email contacts and email contact groups to whom you email reports. Contact groups can contain both user-configured contacts from MiVoice Analytics as well as all existing employees from YourSite Explorer.

To create a contact group

1. Add email contacts
2. Add contact groups
3. Add email contacts to the groups

Adding email contacts

To add an email contact

1. Hover over **My options** and select **Contacts=>My email contacts**.
2. Click **Add**.
3. After **First name**, type the first name of your contact.
4. After **Last name**, type the last name of your contact.
5. After **Email address**, type the email address of your contact.
6. To save this contact, click **Save**.
7. To save this contact and add another contact, click **Save & Add**.

Adding contact groups

To add a contact group

1. Hover over **My options** and select **Contacts=>My email contacts group**.
2. Click **Add**.
3. After **Name**, type the name of the contact group.
4. After **Description**, type the description of the contact group.
5. To share this contact group with other CCMWeb users, select **Shared Contact Group**.
   A shared contact group can be viewed, used, and edited by other users.
6. To save this contact group, click **Save**.
7. To save this contact group and add another contact group, click **Save & Add**.

Adding email contacts to contact groups

To add an email contact to a contact group

1. Hover over **My options** and select **Contacts=>My email contacts group**.

2. Click **Members** for the contact group with which you want to associate agents.

3. If you want to add members from your contacts configured in CCMWeb, click **Contacts**. If you want to add members from the employees configured in YourSite Explorer, click **Employees**.

    Both contacts and employees can be added to the same contact group.

4. Under **Available contacts**, select the check boxes of the members you want to add to the group and click **Add >>**.

Chapter 5
REAL-TIME MONITORS

Contact Center Client

Accessing real-time information with Ignite (WEB)

REAL-TIME MONITORS

The Enterprise Server continuously updates the real-time applications with gateway data and simultaneously updates connected clients through Transmission Control Protocol-Internet Protocol (TCP/IP). Real-time monitors are automatically updated to reflect device and device group changes made in YourSite Explorer. Supervisors and agents are provided with point-and-click access to real-time performance statistics for their contact center, enabling them to identify issues in contact center performance and see who is available to answer or assist with calls.

The real-time applications include Contact Center Client, Ignite (WEB), and WallBoarder. In Contact Center Client and Ignite (WEB), supervisors and agents can view real-time voice statistics and the phone availability of contact center agents and employees. In contact centers that have the Multimedia Contact Center optional application, supervisors and agents can view real-time voice, email, chat, SMS, and open media statistics. WallBoarder displays text messages and contact center statistics on one or more Spectrum Light Emitting Diode (LED) reader boards (wall signs). WallBoarder administration details are included in the *MiContact Center Business Installation and Administration Guide*.

Call recordings are initiated in Contact Center Client and are appended to specific Lifecycle reports.

In addition to real-time monitors, Contact Center Client includes the following application areas:

- **Interactive Contact Center**
  Using Interactive Contact Center, you can control the availability of agents and ACD queues. Agents can log themselves on or off, and place themselves in or remove themselves from Make Busy or Do Not Disturb.

  See "Interactive Contact Center" on page 145.

- **Auditor**
  Using Auditor, supervisors can view the historical real-time events that occurred on a particular date, in the sequence they occurred, at your own pace.

  See "Viewing historical real-time events with Auditor" on page 98.

- **Management Console**
  Using Management Console, System Administrators can restart services, administer the database, and perform maintenance functions.

  System administration is described in the *MiContact Center Business Installation and Administration Guide*.

- **Data-mining**
  The ACD Inspector searches for agent and ACD queue event records. The SMDR Inspector searches through SMDR data to find specific contact center events.

  Data mining is described in the *MiContact Center Business Installation and Administration Guide*.

- **Contact Center Chat**
  Contact Center Client provides instant messaging capabilities for employees. Contact Center Chat provides the online chat presence of employees, including Online, Offline, and Away. Employees can view the availability and presence of other employees before they transfer calls or send online chat messages. With Microsoft Skype for Business Server, Contact Center Chat integrates with Skype for Business to provide enhanced presence.

  See "Using Contact Center Chat" on page 120.

The following applications and features reside in Contact Center Client:

- **Interactive Visual Queue**
  Interactive Visual Queue is an optional application that enables agents to monitor calls within queues, move calls from busy queues to less active queues, and call back abandoned callers.

  See "Interactive Visual Queue" on page 164.

- **Contact Center PhoneSet Manager and Contact Center Softphone**
  Contact Center PhoneSet Manager and Contact Center Softphone are optional applications that enable employees to use their desktop computers as IP-based phones.

  See "Contact Center PhoneSet Manager and Contact Center Softphone" on page 177.

- **Contact Center Screen Pop**
  Contact Center Screen Pop is an optional application that launches applications or webpages. In addition, it enables agents to automatically receive caller and account information via pop-ups on their computer monitors every time they receive calls.

  Contact Center Screen Pop configuration and details are included in the *MiContact Center Business Installation and Administration Guide*.

- **Contact Center Chat with Skype for Business**
  With the addition of Microsoft Skype for Business Server, employees and supervisors use Skype for Business as their default instant messaging client. The presence of all company employees is natively delivered in Contact Center Client. Contact center employees can view the presence of both internal and external contacts to determine if they are available to communicate. In addition to Available, Offline, and Away, employees see In a Meeting, Busy, In a call, Do Not Disturb, Be Right Back, and other presence indicators.

  See "Using Contact Center Chat with Skype for Business" on page 122.

CONTACT CENTER CLIENT

NOTE:

- Your ability to view real-time monitors and devices in Contact Center Client is dependent on administrative security settings.
- An employee must be a member of an employee group in order for you to view the employee on the employee group monitors in Contact Center Client. A queue must be a member of a queue group in order for you to view the queue on the queue group monitors in Contact Center Client.
- The number of employees logged on at any time must be consistent with your software license.

Contact Center Client uses ribbons for device and monitor control. (See Figure 9.)
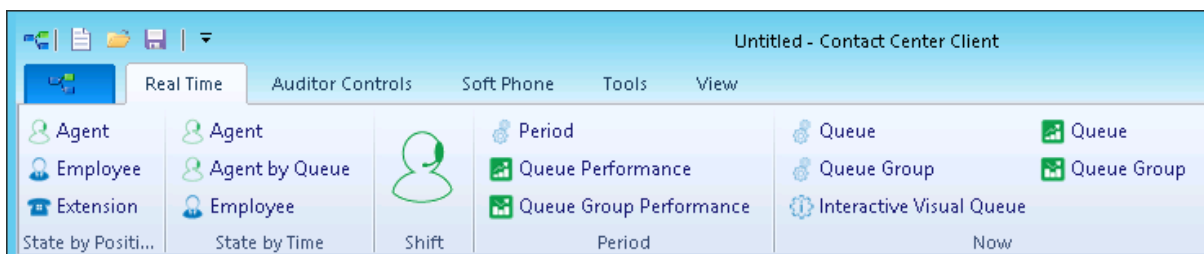
Figure 9: Contact Center Client ribbon

Some tabs that display in the ribbon are dependent upon which monitor is active. These are referred to as context sensitive tabs. When you enable context sensitivity for monitors, the associated context sensitive tab for the active monitor automatically becomes the active tab. See Table 1 for a list of the associated context sensitive tabs for each monitor. See Figure 10 for an example of context sensitivity enabled for the Agent State by Position monitor. Note that the Agent and Monitor Control tabs display in the ribbon.

NOTE: The options that display in the Contact Center Client ribbon are dependent upon your individual security settings. Options which you are not given access to will not display.

Table 1:   Context sensitivity options display per monitor

MONITOR	ASSOCIATED CONTEXT SENSITIVE TABS
Agent State by Position	Agent and Monitor Control tabs
Employee State by Position	Employee and Monitor Control tabs
Extension State by Position	Extension and Monitor Control tabs **NOTE**: When an agent is logged into an extension, the context sensitivity tab displays 'Agent Control'. When no agent is logged into the extension, the context sensitivity tab displays 'Extension Control'.
Extension Now	Monitor Options tab
Agent State by Time	Agent and Monitor Control tabs
Agent State by Time for Queue	Agent and Monitor Control tabs
Employee State by Time	Employee and Monitor Control tabs
Agent Shift	Agent and Monitor Control tabs
Queue by Period	Monitor Options tab
Queue Now	Monitor Options tab
Queue Group Now	Monitor Options tab
Queue Performance	Chart Options tab
Queue Group Performance	Chart Options tab
Queue	Chart Options tab

**Table 1:   Context sensitivity options display per monitor
(continued)**

MONITOR	ASSOCIATED CONTEXT SENSITIVE TABS
Queue Group	Chart Options tab
Interactive Visual Queue	n/a **NOTE**: Context sensitivity is not supported for the Interactive Visual Queue monitor
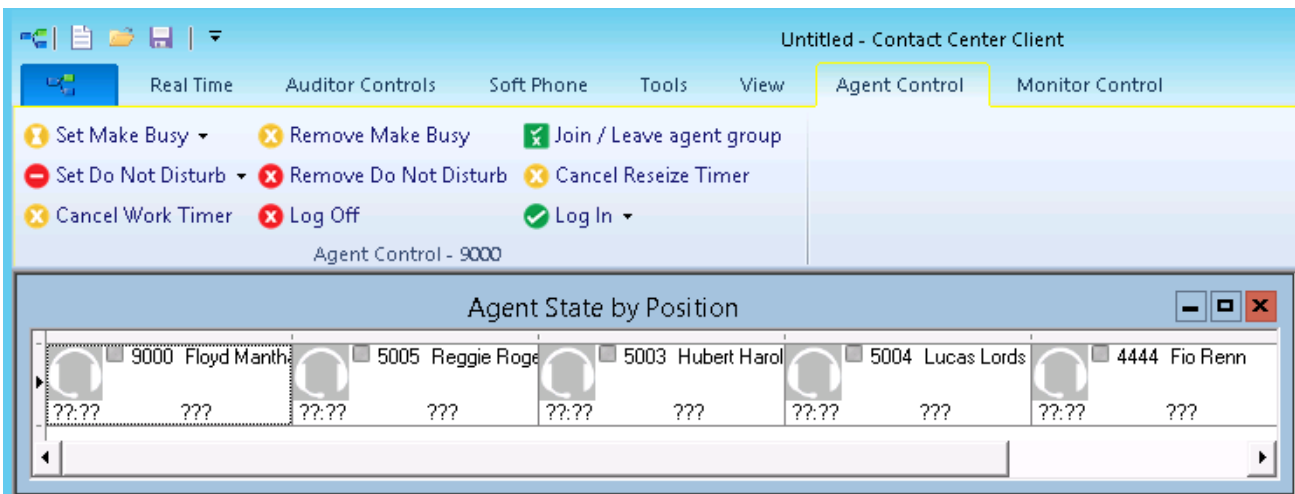
Figure 10: Context sensitivity example - Agent Control tab

STARTING CONTACT CENTER CLIENT

You start Contact Center Client to access real-time functionality. Supervisors and agents can view real-time voice statistics. In contact centers that have the optional Multimedia Contact Center application, supervisors and agents can view real-time voice, email, chat, SMS, and open media statistics. After starting Contact Center Client, you can choose to minimize it to either the system tray or the taskbar, depending on your operating system.

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

To start Contact Center Client

1. Open **Contact Center Client**.
2. If prompted, type your **Username** and **Password** and verify the **Enterprise Server** IP address.
3. If you use Secure Socket Layer, select **SSL**.
4. Optionally, select **Remember my credentials**.
5. Click **Login**.

To display Contact Center Client in the taskbar

1. In Contact Center Client, click the **File** tab.
2. Click **Options**.
3. Clear the **Hide when minimized** check box and click **OK**.
   Contact Center Client, when minimized, will display in the taskbar.
4. To save the profile, click **File=>Save as**.
5. Type a **Name** for the profile and click **OK**.
   The profile is saved and will automatically be applied each time you open Contact Center Client.

   When your System Administrator changes device settings (such as changes to naming or associations between devices), they will be automatically reflected in your Contact Center Client user profile.

CONFIGURING CONTACT CENTER CLIENT OPTIONS

You can customize the Contact Center Client user interface and real-time monitor device control and display options by accessing the Options menu.

To configure Contact Center Client options

1. In the ribbon, click the **File** tab.
2. Click **Options**.
   The Options window displays.
   See Figure 11.
3. Under **User interface display**, select a **Toolbar style**, **Real-time icon** type, **Background** color, **Page size**, and whether you want to hide Contact Center Client when the window is minimized.
4. Select **Context Sensitivity** for **Monitors** if you want the context sensitive tab to automatically become the active tab when you select a monitor.
   NOTE: Monitor context sensitivity is enabled by default.
5. Select **Context Sensitivity** for **Soft phone** if you want the soft phone tab to automatically become the active tab when a call is received.
   If the Soft phone toolbar is floating, context sensitivity does not apply. Soft phone context sensitivity is disabled by default.
6. Select the **Display monitor device control option** check box if you want to be able to see the option for monitor control when you right-click cells in a real-time monitor.
   NOTE: Monitor control enables you to simultaneously control all of the agents on a monitor and is only available if you have appropriate permissions.

7. Configure **Time format** options.
   The options you select will display in the real-time monitor cells.

8. Under **Full name format**, select how you want agent and employee first and last names to display in real-time monitors.

9. Click **OK**.
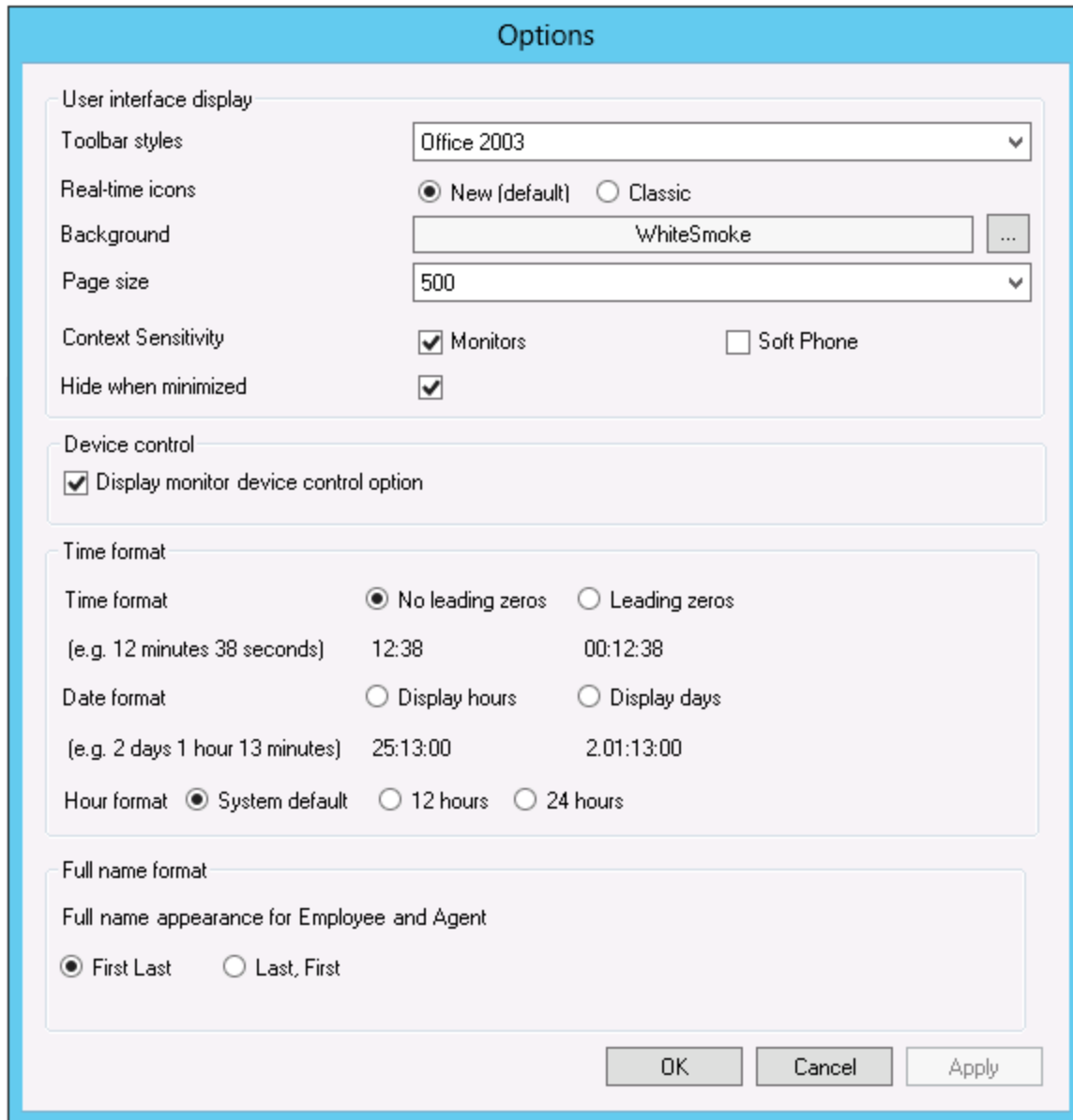
Figure 11: Contact Center Client options

ADJUSTING THE CONTACT CENTER CLIENT VIEW

You can adjust the way you view Contact Center Client features on your desktop.

To adjust the view

1. Click **View** in the Contact Center Client ribbon.
   The View options ribbon opens.

   See Figure 12.
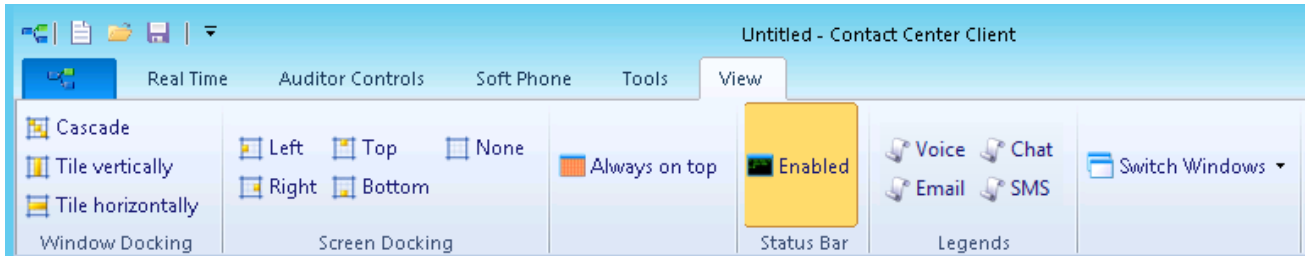
Figure 12: View options ribbon

2. To change the way monitors display inside Contact Center Client, select from the options in the **Window Docking** column.

3. To adjust the position of the Contact Center Client window on your desktop, select from the options in the **Screen Docking** column.

4. If you want Contact Center Client to always display on top of other applications on your desktop, click **Always on top**.

5. Enable the **Status Bar** if you want the status bar to be visible at the bottom of the Contact Center Client window.
   See Figure 13.
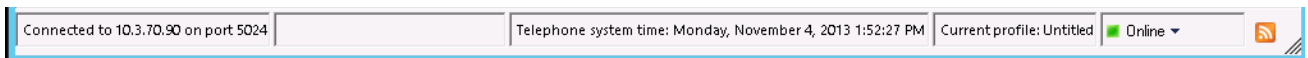
Figure 13: Status bar

6. To open Voice, Email, Chat, or SMS legends, select from the options in the **Legends** column.

EMPLOYEE AND AGENT STATES

NOTE:

- If Contact Center Client becomes disconnected from the server, upon re-connection the following states will automatically be synchronized with the server.

Table 2 lists the employee states and their corresponding icons.

Table 3 lists the agent states and their corresponding icons.

Table 2:   Employee states

TERM	ICON	MEANING
Ringing		An ACD interaction ringing on the employee, waiting to be handled
ACD		An employee handling an ACD interaction
ACD Hold		An employee who has placed an ACD interaction on hold
Idle		An employee logged on and waiting to receive an interaction
Non ACD		An employee involved in an incoming Non ACD interaction or employee-originated voice interaction
Non ACD Hold		An employee who has placed a Non ACD voice interaction on hold
Outbound		An employee on an outgoing voice interaction
Outbound Hold		An employee who has placed an outgoing voice interaction on hold
Do Not Disturb		An employee who has activated Do Not Disturb and is not available to receive any ACD or Non ACD interactions

Table 2:   Employee states (continued)

TERM	ICON	MEANING
Make Busy		An employee who is not available to receive ACD interactions but can receive transferred interactions and voice interactions dialed directly to the employee This icon also displays when an agent is in the Reseize Timer state. When voice agents fail to answer a voice interaction, agents are placed in Make Busy (Reseize Timer) This icon also displays when an external hot desk agent is in the Reseize Timer state
System Make Busy		An employee that the system has put into a state where they cannot receive ACD contacts. For example, if an employee is offered a communication and does not answer, they will be put into System Make Busy for a predetermined length of time.
Work Timer		An employee who is completing post-contact work, such as paperwork, and is unavailable to receive interactions of that media type
Logged Off		An employee not currently logged in to any queue
Logged In Not Present		An employee logged in but not present in any of their agent groups, and employees not present in a media type across all groups.
Unavailable		An employee who has not generated any activity since MiContact Center Business was started

Table 3:   Agent states

TERM	VOICE	EMAIL	CHAT	SMS	MEANING
Ringing					An ACD interaction ringing on an agent, waiting to be handled

Table 3: Agent states (continued)

TERM	VOICE	EMAIL	CHAT	SMS	MEANING
ACD					An agent handling an ACD interaction
ACD Hold					An agent who has placed an ACD interaction on hold
Idle					An agent logged on and waiting to receive an interaction
Non ACD		-	-	-	An agent involved in an incoming Non ACD interaction or agent-originated voice interaction
Non ACD Hold		-	-	-	An agent who has placed a Non ACD voice interaction on hold
Outbound		-	-	-	An agent on an outgoing voice interaction
Outbound Hold		-	-	-	An agent who has placed an outgoing voice interaction on hold
Do Not Disturb					An agent who has activated Do Not Disturb and is not available to receive any ACD or Non ACD voice interactions

Table 3:   Agent states (continued)

TERM	VOICE	EMAIL	CHAT	SMS	MEANING
Make Busy					An agent who is not available to receive ACD interactions but can receive transferred interactions and voice interactions dialed directly to the agent This icon also displays when an external hot desk agent is in the Reseize Timer state
System Make Busy					An employee that the system has put into a state where they cannot receive ACD contacts. For example, if an employee is offered a communication and does not answer, they will be put into System Make Busy for a predetermined length of time.
Work Timer					An agent who is completing post-contact work, such as paperwork, and is unavailable to receive interactions of that media type
Unknown					An agent who has not generated any activity since MiContact Center Business was started
Logged Off					An agent not currently logged in to any queue

Table 3:   Agent states (continued)

TERM	VOICE	EMAIL	CHAT	SMS	MEANING
Logged In Not Present					An agent logged in but not present to any of their agent groups, and agents not present to a media type across all groups

EXTENSION STATES

NOTE:

- If your Contact Center Client becomes disconnected from the server, upon re-connection the extension states will automatically by synchronized with the server.
- If an agent is logged into the extension, agent state icons will display. See "Employee and Agent states" on page 50.

Table 4 lists the extension states and their corresponding icons.

Table 4:   Extension states

TERM	ICON	MEANING
Ringing		Call is ringing on the extension and waiting to be handled
ACD		Extension is involved in an ACD call
ACD Hold		Extension has placed an ACD call on hold
Idle		Extension is waiting to receive a call
Non ACD		Extension is involved in an incoming call or an internal extension-originated call
Non ACD Hold		Extension has placed an incoming call or an internal extension-originated call on hold

Table 4:   Extension states (continued)

TERM	ICON	MEANING
Outbound Call		Extension is on an outgoing call
Outbound Hold		Extension has placed an outgoing call on hold
Forwarded to		Extension has set all incoming calls to be forwarded to an alternate answer point
Camp on		Extension is on a call and an incoming call is camped on (waiting to be answered)
Off Hook		Extension's phone is off the hook, so cannot receive calls
Do Not Disturb		Extension has activated Do Not Disturb and is not available to receive calls
Logged Off		Extension is not currently logged on and is unavailable to take calls
Logged In Not Present		Extension is removed from its Ring Groups
Unknown		Extension has not generated any activity since MiContact Center Business was started

UNDERSTANDING CONTACT CENTER CLIENT FEATURES

Contact Center Client has agent, queue, queue chart, and call note monitors. For information on adding and viewing call notes, see "Adding call notes to a call" on page 195.

You can perform the following tasks on the monitors by either right-clicking within the monitor or selecting options via the Contact Center Client ribbon:

- Call recording
- Open monitors

- Dock monitors
- Add and remove device IDs
- Sort monitor devices
- Rearrange cells
- Set monitor dimensions
- Freeze and unfreeze columns
- Hide and show columns
- Filter device variables
- Set alarms
- Clear alarms
- Define monitor styles
- Group data
- Print monitors
- Arrange windows
- Modify the view
- Build marquee monitors to broadcast statistics and messages
- Chat online with other employees

Contact Center Client options

The following options apply to real-time monitors.

Call recording

On the Agent State by Time, Agent State by Position, Agent State by Queue by Time, and Extension by Position monitors, the Call recording option enables you to start, stop, and restart call recording at any time during a call. See "Recording calls" on page 208.

Clear alarms

The Clear alarms command clears any current performance variable threshold alarms.

Set alarms

The Set alarms command specifies performance thresholds for queues, extensions, and agents.

Add/Remove devices

The Add/Remove devices command adds or removes devices or device groups from the monitor. If you add agents, they are added to the bottom of the monitor.

Set table dimensions

On the Agent State by Position, Extension State by Position, and Employee State by Position monitors, the Set table dimensions command adds or deletes columns or rows. If you delete devices, they are deleted them from the lower-right side of the monitor.

Size table to frame

On all monitors, the Size table to frame command adjusts the table to fit within the frame

Sort monitor

On the Agent State by Position, Extension State by Position, and Employee State by Position monitors, the Sort monitor by Agent ID, name, state, or extension command sorts agents by Agent ID, name, state and time in state, or extension.

Note that you cannot drag and drop devices between monitors.

Filter device variables

On the Extension Now, Agent Shift, Queue by Period, and Queue Now monitors the Filter device variables command filters the data based on conditions you specify and displays a subset of data on the monitor.

General

On all monitors, under Properties, the General option specifies the monitor name and enables the horizontal and vertical scroll bars.

On the queue monitors, you can also enable grouping.

On the extension, agent, and employee monitors you can also display tool tips, display a pattern upon failover, and display instant messaging online presence indicators.

On the Agent and Employee State by Time monitors, you can also sort logged off agents by the longest logged off first.

Print monitor

The Print monitor command prints the current monitor.

Enable grouping

Under Properties, the Enable grouping option displays a grouping panel to which users can drag columns. The grouping order determines the order in which the rows display. The Enable grouping option affects all monitors that contain columns.

Row settings

Under Properties=>Layout, the Row settings option specifies the background color and font color of rows, and the font type and text alignment.

Row alternate settings

Under Properties=>Layout, the Row alternate settings option specifies the background color and font color of alternate rows, and the font type and text alignment.

Column settings

Under Properties=>Layout, the Column settings option specifies the background color and font color of columns, and the font type and text alignment.

Column dimensions

Under Properties=>Layout, the Column dimensions option specifies the column height and width.

Column order

Under Properties=>Layout, the Column order option hides or displays individual columns, and specifies the order of columns across the monitor.

Monitor style

Under Properties=>Layout, the Monitor style option specifies styles and skins (sets of styles) for the monitor, and the Card design option specifies how information is displayed in the cells of extension, agent, and employee monitors.

Cascade

When you right-click a monitor tab, under Windows, the Cascade command distributes active monitors down and across the Contact Center Client window.

Tile vertically

When you right-click a monitor tab, under Windows, the Tile vertically command distributes active monitors across the Contact Center Client window.

Tile horizontally

When you right-click a monitor tab, under Windows, the Tile horizontally command distributes active monitors down the Contact Center Client window.

Dock Contact Center Client

When you right-click a monitor tab, under Windows, the Dock Contact Center Client command docks Contact Center Client at the top, bottom, left, or right of your desktop.

Always on top

When you right-click a monitor tab, under Windows, and select the Always on top command, Contact Center Client always displays on your desktop on top of all other open applications.

View

The View command hides or displays the main menu, status bar, real-time monitors, voice, email, chat, SMS, and open media legends.

DIAGNOSTICS MONITOR

The log and error monitors are accessed via Contact Center Client.

To access log and error monitors

1. Click **Tools** in the Contact Center Client ribbon.
2. Click either **Log Monitor** or **Error Monitor**, depending on what kind of log information you want to review.
   See Figure 14.
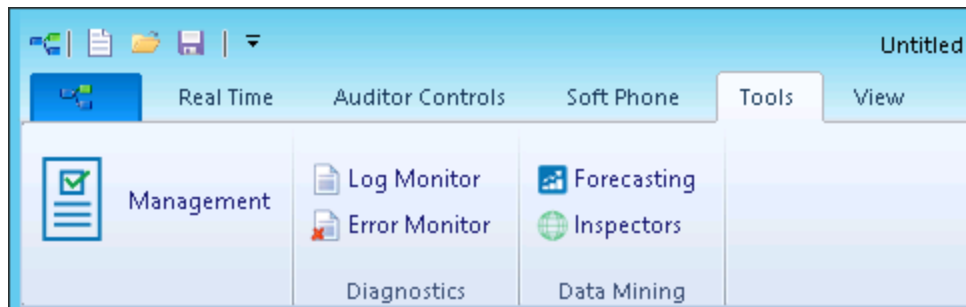
Figure 14: Diagnostics monitors

VIEWING AGENT AVAILABILITY

Contact Center Client provides instant messaging capabilities for both supervisors and agents and is typically used by contact center employees. Contact Center Chat provides the online chat presence of contact center employees, including Online, Offline, and Away. On the agent, employee, and extension monitors, agents can view the availability and presence of other contact center employees before they transfer calls or send online chat messages. (See Figure 15.) If an agent cell in a monitor is grayed out, the phone is not connected to the network and considered out of service. The out of service state applies to phones that are not connected to the network, remote agents and employees that have lost their Internet connection, phones that are physically disconnected or malfunctioning, or employees that are not logged into their soft phone.

Figure 15: Agent State by Position - viewing agent availability and online presence

With the addition of Microsoft Skype for Business Server, agents and supervisors use Skype for Business Client as their default instant messaging client. The presence of all company employees is natively delivered in Contact Center Client. Contact center employees can view the presence of both internal and external contacts to determine if they are available to communicate. In addition to

Available, Offline, and Away, employees see In a Meeting, Busy, In a call, Do Not Disturb, Be Right Back, and other presence indicators. (See Figure 16.)
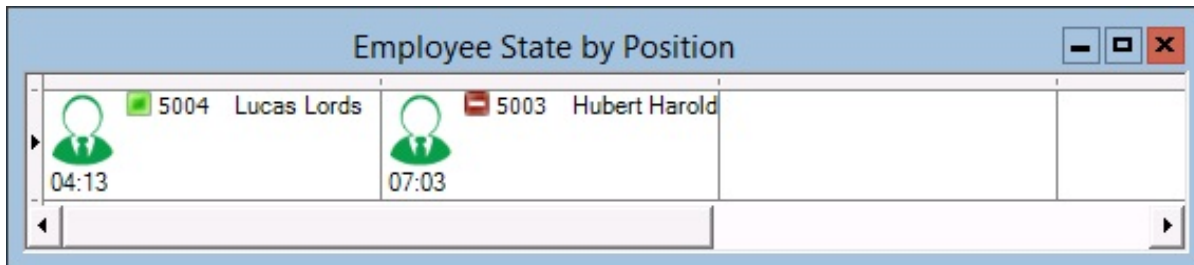
Figure 16: Employee State by Position - viewing employee availability and enhanced presence

The following monitors display agent activities:

- Agent State by Position
- Employee State by Position
- Extension State by Position
- Agent State by Time
- Employee State by Time
- Agent Shift

Extension, Agent, and Employee State by Position

The Extension, Agent, and Employee State by Position monitors provide real-time information in cells that you can arrange to mirror your floor plan: you can view extensions, agents, or employees by their physical position in your contact center. In addition, these monitors enable you to view the current status of general business extensions. Card designs enable you to customize the information displayed in the cells. See "Customizing the information displayed on position and time monitors" on page 114.

Agents can join multiple agent groups and therefore answer for multiple queues. However, each agent has only one ID and displays in a single cell of each applicable monitor. The agent activity that displays in the monitor cell reflects their current overriding action

When you first open a monitor, you can select a card design:

- The Classic card displays the agent state, time in the state, presence, agent/employee name, agent login ID/employee ID, and extension number (or queue name for voice agents on ACD or on ACD Hold).
- The Caller ID card displays the caller name and number (ANI), the number the caller/employee dials for incoming/outgoing calls, the state, time in the state, presence, agent/employee name, agent login ID/employee ID, and extension number (or queue name for voice agents on ACD or on ACD Hold).
- Custom cards you create and share display customized extension/agent/employee and/or caller information.

Caller ID information is displayed when

- Extensions, Agents, and employees are in the following real-time states: ACD, ACD Hold, Ringing, Non ACD, Non ACD Hold, Out, and Out Hold Time
- Extensions are in the following real-time states: Inbound and Outbound

You can set alarms for all real-time statistics and for caller ID information, such as the caller name and number.

NOTE: Before you can select the Caller ID card on the Add devices window of monitors, you must make the card available. To do so, right-click an open monitor, select the Caller ID card under Properties, Layout=>Card design and click Apply.

In a fault tolerant setup, if a network outage occurs the cells in the agent, employee, and extension monitors display a crisscrossed pattern to identify agents who have homed to their secondary controllers.

If an agent cell in a monitor is grayed out, the phone is not connected to the network and considered out of service. The out of service state applies to phones that are not connected to the network, remote agents and employees that have lost their Internet connection, phones that are physically disconnected or malfunctioning, or employees that are not logged into their soft phone.

Viewing the activities of agents who can log on to multiple voice queues

In Figure 17, the Agent State by Position monitor shows three cells for Andre Bourque, each with a different agent ID. The first two cells show Andre logged off of the telephone system. The third cell shows Andre's current state. Andre is logged on to Queue 151 using Agent ID 2013. He has been on an ACD call for 12 minutes and 50 seconds.

Figure 17: Agent State by Position - viewing multiple agent IDs

Agents can log on to the telephone system using only one agent ID at a time. If your agents have multiple voice IDs (and therefore multiple cells) the Agent State by Position monitor becomes cluttered.

If you have agents who are cross trained to answer calls for different departments (and log in and out of various voice queues) the telephone system requires you assign the agents multiple IDs. You can use the Agent State by Position monitor to view the activities of each department. You create an Agent State by Position monitor for each department. When you arrange the cells for the agents in the same order for each department, you can easily compare the activities of one department with another.

Viewing the current logged on states of agents who log on to multiple queues

If you have voice agents who are cross trained to answer calls for different departments (and log in and out of several queues) the telephone system requires you assign the agents multiple IDs. If a voice agent has multiple agent IDs and you want to view the agent's current logged on state only, you use the Employee State by Position monitor.

To view the monitor, you open the Employee State by Position monitor and select employees to add to the monitor. The monitor shows one cell for Andrew, listing his current state and agent ID. (See Figure 18.)
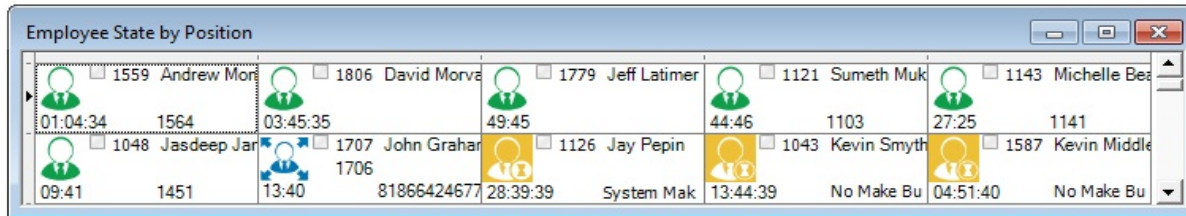
Figure 18: Employee State by Position - viewing the ID to which the agent is logged on

Andrew is currently logged on to Extension 1564 using Agent ID 1559. Sometime later you notice Andrew is logged on to Extension 1059 using Agent ID 1788. (See Figure 19.)
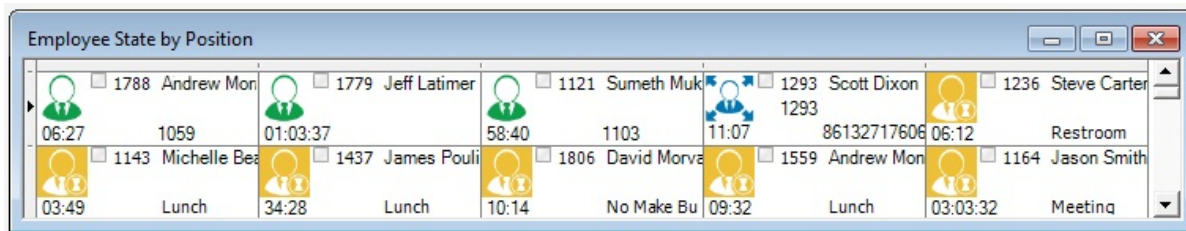
Figure 19: Employee State by Position

Agent State and Employee State by Time

The Agent State by Time and Employee State by Time monitors provide real-time agent information under ACD, Idle, Non ACD, Unavailable, and Logged Off column headings. They display the same real-time information as that of the Extension State by Position, Agent State by Position, and Employee State by Position monitors. See "Extension, Agent, and Employee State by Position" on page 61.

If an agent is in an email, chat, or SMS agent state, the monitors display the queue number to which the agent is logged on. Each column lists agents in order of time in state. You can specify which columns of agent statistics are displayed, and the order in which they are displayed. You can sort logged off agents by the longest logged off first. (See Figure 20.)

If you have agents who are cross trained to answer calls for different departments (and log in and out of various voice queues) the ACD routing system requires you assign the agents multiple IDs. You use the Employee State by Time monitor to view the activities of voice agents with multiple agent IDs. See "Viewing the current logged on states of agents who log on to multiple queues" on page 62.
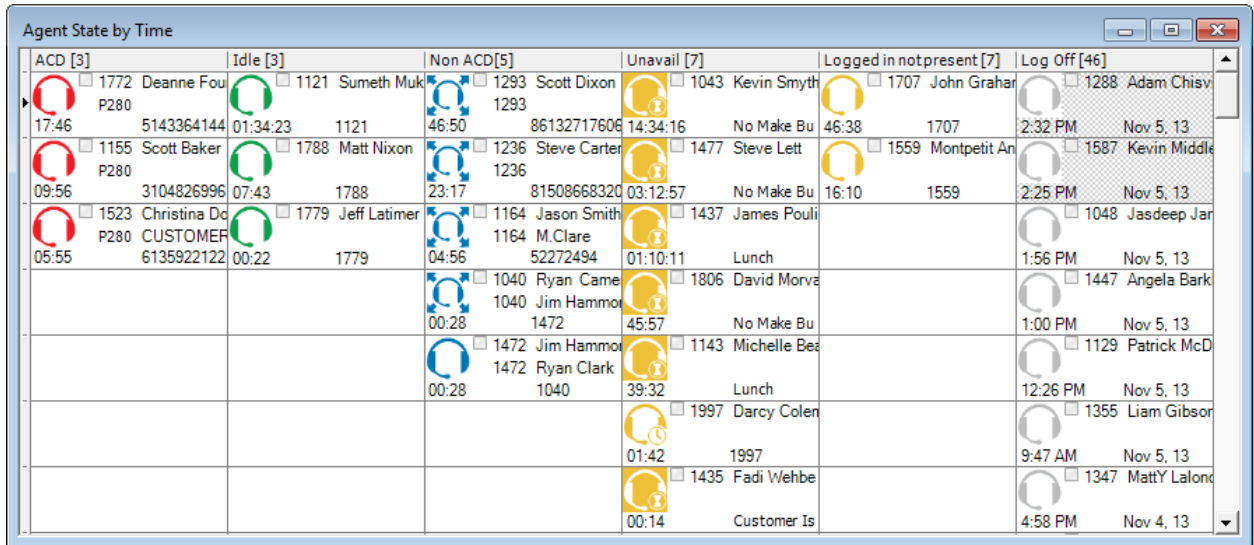
Figure 20: Agent State by Time

Table 5 lists the Agent State by Time and Employee State by Time column headings and their associated agent states.

Table 5:   Agent State by Time and Employee State by Time column headings

CATEGORY	ASSOCIATED AGENT STATES
ACD	includes agents in ACD and agents in ACD Hold
Idle	includes agents in the Idle state
Non ACD	includes agents in Non ACD, in Non ACD Hold, Outbound agents, and Outbound Hold agents
Unavailable	includes agents in Do Not Disturb, Make Busy, Work Timer, Reseize Timer, and Unknown
Logged in not present	includes agents logged in but not present to any of their agent groups, and agents not present to a media type across all groups
Log Off	includes agents in the Logged Off and Offline (Ignite, WEB) states

Agent State by Time for Queue

The Agent State by Time for Queue monitor is a Contact Center Client real-time monitor designed specifically for contact centers using Agent Group Presence functionality. However, the Agent State by Time for Queue monitor is available for all media server types.

The Agent State by Time for Queue monitor is accessed from the Real Time tab in Contact Center Client and displays all agents configured in a specific queue and agents who are on ACD calls, idle, on Non ACD calls, unavailable, logged on to the system (but not present in the queue being monitored), and logged off. (See Figure 21).

NOTE:

- Virtual queue groups are shown under the Virtual queue groups section of the Agent State by Time for Queue monitor. Any Agent State by Time for Queue monitors that are monitoring virtual queues are marked in the title as (virtual).

- The Agent State by Time for Queue monitor does not support viewing Ring Groups.
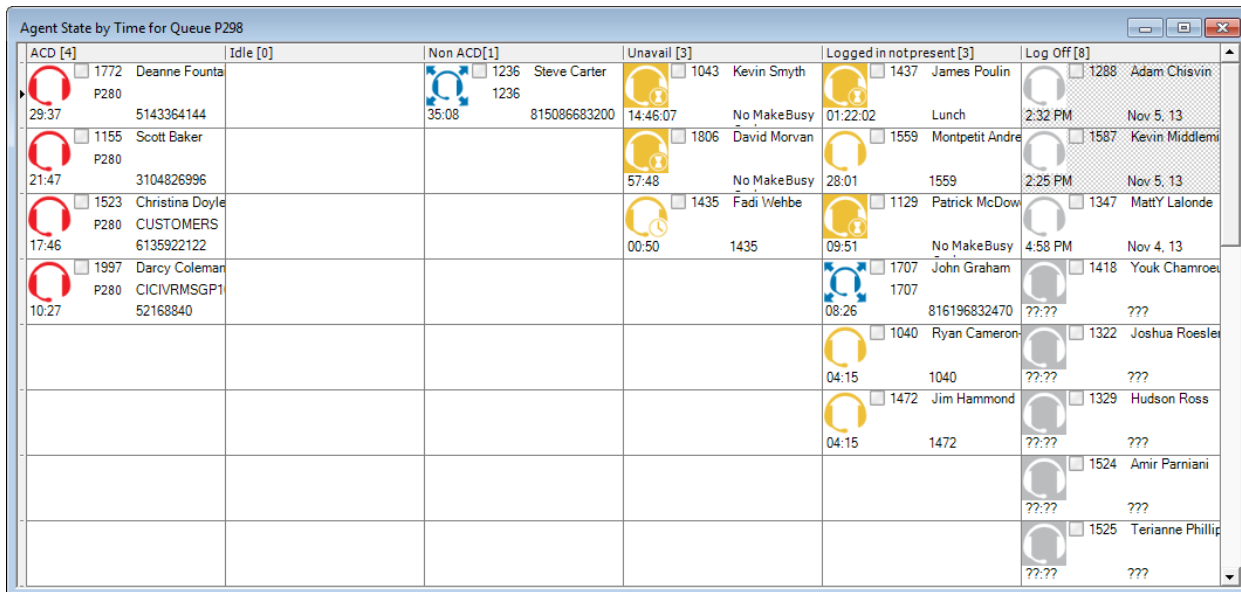
Figure 21: Agent State by Time for Queue

Table 6 lists the Agent State by Time and Employee State by Time column headings and their associated agent states.

Table 6:   Agent State by Time for Queue column headings

CATEGORY	ASSOCIATED AGENT STATES
ACD	includes agents in ACD and agents in ACD Hold
Idle	includes agents in the Idle state
Non ACD	includes agents in Non ACD, in Non ACD Hold, Outbound agents, and Outbound Hold agents
Unavailable	includes agents in Do Not Disturb, Make Busy, Work Timer, and Reseize Timer
Logged in not present	includes agents logged in but not present to any of their agent groups, and agents not present to a media type across all groups
Log Off	includes agents in the Logged Off, Unknown, and Offline (Ignite, WEB) states

To view the Agent State by Time for Queue monitor

1. In the Contact Center Client ribbon, click the **Real Time** tab.

2. In the **State by Time** column on the ribbon, click **Agent by Queue**.

3. Select the queues to monitor. You can optionally sort members in either ascending or descending order.

4. Click **OK**.

Agent Shift

The Agent Shift monitor provides running totals of statistics on individual agents for the day. You can specify which columns of statistics are displayed, rearrange columns, and sort individual columns in ascending or descending order. (See Figure 22.)

Figure 22: Agent Shift

Agent Shift column heading definitions

Table 7 describes the Agent Shift column headings.

Table 7:   Agent Shift column headings

TERM	ABBREVIATED NAME	MEANING
Agent State		The agent's media type and current state
Media Server	Media Server	The media server to which the agent is associated
Agent Shift Name	Name	The name of the agent being monitored
Agent login ID	Agent login ID	The login ID of the agent being monitored
Extension Number	Extn #	The extension where the agent logged in (voice only)
Logged On	Log In	The most recent time the agent logged in

Table 7:   Agent Shift column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Last Event Received	Last Event Recd	The most recent time an agent event occurred
Shift Time	Shift Time	The total elapsed time logged for the agent, calculated based on the difference between log in and last event received
ACD Time	ACD Time	The duration of ACD interactions handled, from agent pickup to completion (not including hold time)
ACD Hold Time	ACD Hold Time	The duration of time ACD interactions spent on hold
Non ACD Time	Non ACD Time	The duration of Non ACD interactions handled, from agent pickup to completion (not including hold time) (voice only)
Non ACD Hold Time	Non ACD Hold Time	The duration of time Non ACD interactions spent on hold
Outbound Time	Out Time	The duration of time agents spent handling outbound calls (voice only)
Outbound Hold Time	Out Hold Time	The duration of time outbound calls spent on hold, for agents (voice only)
Do Not Disturb Time	DND Time	The duration of time the agent entered the Do Not Disturb State
Make Busy Time	MKB Time	The number of times the agent entered the Make Busy state
Wrap Up Time	Wrap Up Time	The duration of time where Wrap Up Time was the overriding state for the agent. Wrap up time does not include any time spent making or taking interactions during the wrap up timer.
Do Not Disturb Count	DND Cnt	The number of times the agent entered the Do Not Disturb state
Make Busy Count	MKB Cnt	The number of times the agent entered the Make Busy state
ACD Count	ACD Cnt	The number of ACD interactions handled by the agent

Table 7:   Agent Shift column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Short ACD Count	Shrt ACD Cnt	The number of ACD interactions handled by the agent where the handle time was less than the Short Handle parameter
Non ACD Count	Non ACD Cnt	The number of Non ACD interactions handled by the agent (voice only)
Hold ACD Count	Hold ACD Cnt	The number of times ACD interactions were placed on hold (voice only)
Non ACD Hold Count	Non ACD Hold Cnt	The number of times Non ACD interactions were placed on hold
Outbound Count	Out Cnt	The number of outbound calls made by the agent (voice only)
Outbound Hold Count	Out Hold Cnt	The number of times outbound calls were placed on hold (voice only)
Contacts Per Hour	Contacts Per Hour	The total ACD interaction count minus the ACD short handle count, divided by the shift time for the agent
On Failover	On failover	Indicates whether the primary media server is offline and has failed over to the secondary media server (voice only)
Agent Unavailable Percent	Agt Unavail %	The percentage of shift time for which the agent was unavailable to receive interactions
Logged In Not Present Time	Logged In Not Present Time	The duration of time the agent was logged into but not present to any of their agent groups, and the duration of time the agent was not present in a media type across all groups
Average Handle	Avg Hndl	The average amount of time the agent spent handling ACD interactions (ACD Time divided by ACD Count, excluding ACD Hold Time)
Occupancy	Occp	The duration of time the agent spent processing interactions, including ringing time

Viewing Agent and Extension Availability and Resiliency

Contact Center Client's Agent, Employee, and Extension real-time monitors provide a visual indication if agents fail over to a resilient media server. In an Agent monitor (Agent State by Position, Agent State by Time, and Agent State by Queue by Time), if an agent fails over to the secondary voice media server, a cross-hatch pattern displays in the agent's cell in the monitor. (See Figure 23.)
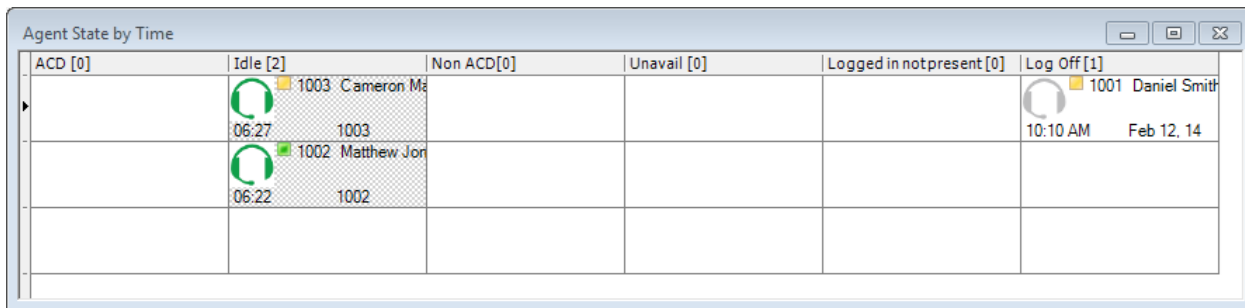
Figure 23: Agent monitor with failed over agents

In an Employee monitor (Employee State by Position and Employee State by Time), if an employee's agent fails over to the secondary voice media server, a cross-hatch pattern displays in the employee's cell in the monitor. (See Figure 24.)
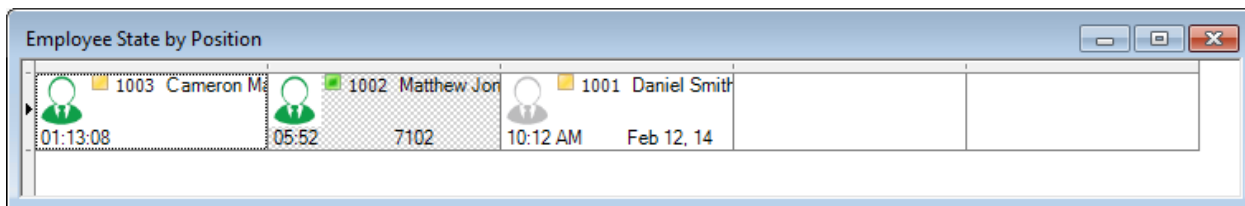
Figure 24: Employee monitor with failed over agents

In an Extension monitor, if a logged in agent who is associated to an extension fails over to the secondary voice media server, then a cross-hatch pattern is applied to the agent's associated extension in the extension monitor. (See Figure 25.)

NOTE: Extensions that fail over to the secondary voice media server do not have a cross-hatch pattern applied to their cell.
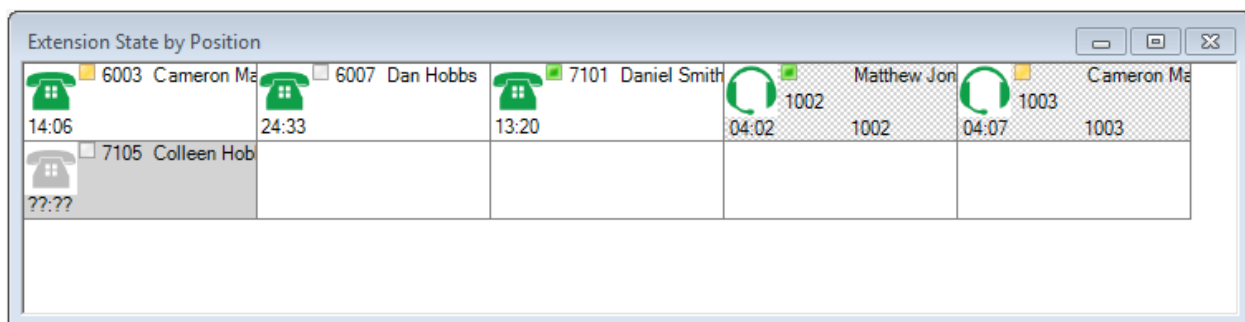
Figure 25: Extension monitor with failed over agents

Modifying visual indicator settings for agents failing over

By default, monitors are configured to display a pattern if agents fail over to a secondary media server. This setting is optional, however, and can be disabled on a monitor-by-monitor basis.

The following procedures explain how to

- Disable visual indicators for agents failing over
- Enable visual indicators for agents failing over

To disable visual indicators for agents failing over

1. Right-click in an open monitor and select **Properties**.
2. In the **General** tab, clear **Display pattern when on failover**.
3. Click **OK**.

To enable visual indicators for agents failing over

1. Right-click in an open monitor and select **Properties**.
2. In the **General** tab, select **Display pattern when on failover**.
3. Click **OK**.

VIEWING EXTENSIONS

In your business, you may be monitoring

- Traditional or hot desking ACD agents who sit at different desks each day and who log on using their agent ID
- General business, traditional extensions (non-contact center employees) who sit at the same desks each day, are assigned their own desk phone extensions, and do not log on to their phones (their phones are programmed with their personal settings and are always active)
- General business, hot desking extensions (non-contact center employees) who log on to any phone in the enterprise with a virtual extension configured with their personal settings. When the employee logs on the extension becomes active. When the employee logs off of the extension it goes out of service.

The following monitors are available for viewing extensions:

- Extension State by Position
- Extension Now

You can set up your real-time monitor profile to include two or more Extension by Position monitors: one with cells that are arranged to show the whereabouts of agents in your contact center, and another that shows the status of general business extensions: active/inactive, inbound/outbound.

Extension Inbound

Extension Inbound refers to a general business extension on an inbound call.

Extension Outbound

Extension Outbound refers to a general business extension on an outbound call

General business active extension

General business active extension refers to a Mitel desk phone/Contact Center PhoneSet Manager/Contact Center Softphone that is live with no ACD agents logged on (active extension), or an extension to which a general business hot desking user is logged on. The user is an active extension not logged on to any ACD queue.

General business inactive extension

General business inactive extension refers to a Mitel desk phone that has been unplugged or is damaged, or a soft phone that is not running because the computer is turned off or Contact Center Client is not running, or a hot desking extension to which nobody is logged on.

Traditional or hot desking ACD agents who sit at different desks each day

If you have traditional or hot desking ACD agents who sit at different desks each day, you use the Extension State by Position monitor to view where they are sitting in the contact center. After you add Registration Directory Numbers (RDNs)/desk phone extensions to the monitor, you can arrange the cells to match the layout of your contact center.

When nobody is logged on to a particular extension, the monitor cell displays the General business active icon and the phone set RDN ID. When an agent logs on to the desk phone, the monitor cell displays the ACD agent status, (which can include information such as the time in state, queue reporting number, and Make Busy status), the agent ID, the agent name, and the RDN (at the bottom of the cell). Depending on the agent's current state you may see additional information, such as the time in state, queue reporting number, or Make Busy status. If the Caller ID card design is selected, you will also see the caller name and phone number. (See Figure 26.)

If you would prefer that Extension State by Position monitor cells be blank when there are no agents logged on to the telephone system, you can right-click the monitor, select Properties, and clear the Enable the general business view check box.

If an agent cell in a monitor is grayed out, the phone is not connected to the network and considered out of service. The out of service state applies to phones that are not connected to the network, remote agents or employees that have lost their Internet connection, phones that are physically disconnected or malfunctioning, or employees that are not logged into their soft phone.
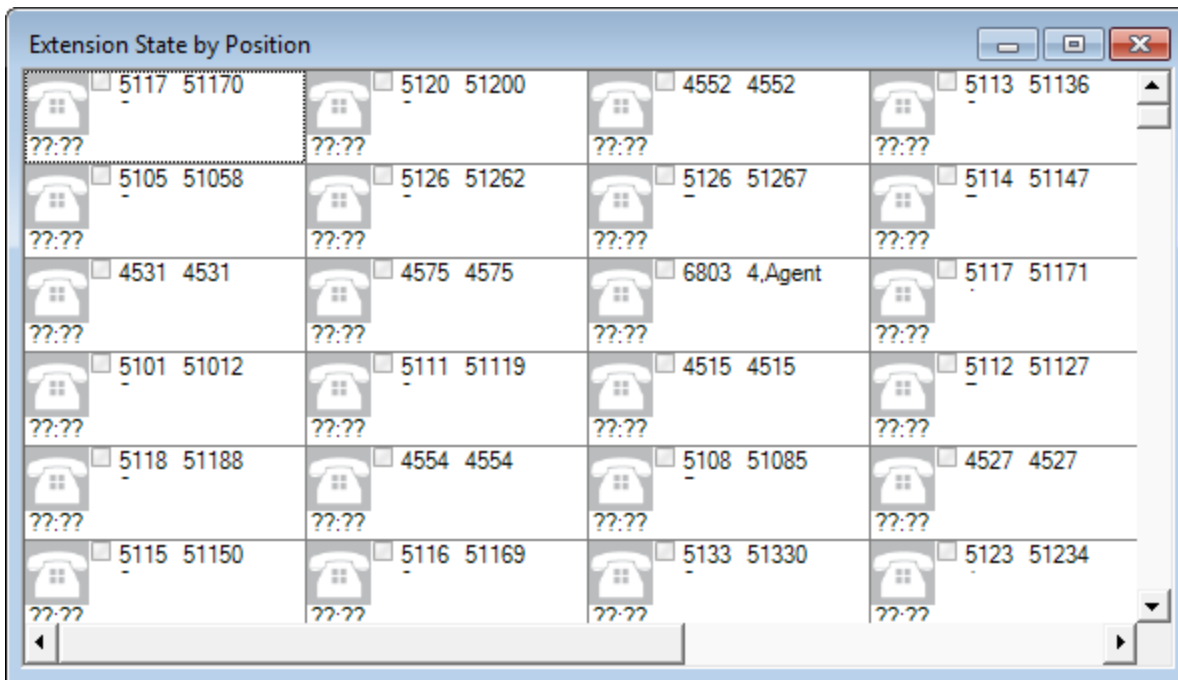
Figure 26: Extension State by Position

General business, traditional extensions who sit at the same desks each day

If you have general business, traditional extensions who sit at the same desks each day, you use the Extension State by Position monitor to view where they are sitting in the contact center. After you add their extensions to the monitor, you can arrange the cells to match the layout of your business, or arrange them alphabetically or by department.

When a general business employee is in Idle, the cell for the employee's phone extension in the Extension State by Position monitor displays the employee's name and extension number, and the General business active icon. When the employee is on an incoming/outgoing call, the cell displays the Extension Inbound/Extension Outbound icon, the employee's name and extension number, and the time in state. If the Caller ID card design is selected, you will also see the caller name and phone number. Either card enables you to readily determine the online and phone availability of general business subject matter experts.

General business hot desking employees who sit at different desks each day

General business, hot desking extensions can log on to any phone in the enterprise and access their personal settings. When adding extensions to the Extension State by Position monitor, you can arrange them alphabetically or by department.

When an employee is logged on, the monitor cell displays the General business active icon, the employee's name and extension. When the employee is on an incoming/outgoing call, the cell displays the Extension Inbound/Extension Outbound icon and the time in state. If the Caller ID card design is selected, you will also see the caller name and phone number. When the employee logs off, the monitor cell is grayed out (inactive). (See Figure 27.)
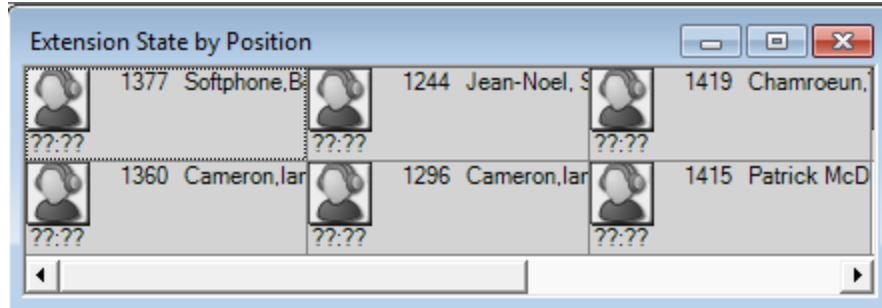
Figure 27: Extension State by Position

Extension Now

The Extension Now monitor enables supervisors to view extension statistics in real time. The Extension Now monitor provides visibility to extensions. If an agent logs out of an extension displayed in this monitor, the extension will go out of service and will not be updated in real time. In the Extension Now monitor, you can specify which columns of statistics are displayed, rearrange columns, and sort individual columns in ascending or descending order. (See Figure 28.)

NOTE: Extensions must be licensed to display statistics.

Figure 28: Extension Now monitor

Extension Now column heading definitions

Table 8 indicates the current status of the extension and describes the real-time and over-the-business-day Extension Now extension statistics.

Table 8:   Extension Now extension statistic column headings

TERM	MEANING
Media Server	The extension's media server
Name	The extension name
Reporting	The extension's reporting number **NOTE:** The extension reporting number is also its dialable number.
Last Event Recd	The most recent time an extension event occurred
ACD Time	The duration of ACD (Ring Group) interactions handled, from extension pickup to completion (not including hold time)
ACD Hold Time	The duration of time ACD (Ring Group) interactions spent on hold
Non ACD Time	The duration of Non ACD interactions handled, from extension pickup to completion (not including hold time)
Non ACD Hold Time	The total time for Non ACD calls put on hold
Out Time	The number of outbound calls made by the extension
Out Hold Time	The duration of time outbound calls spent on hold for extensions
DND Time	The duration of time where Do Not Disturb was the overriding state for the extension
DND Cnt	The number of times the extension entered the Do Not Disturb state
ACD Cnt	The total number of ACD (Ring Group) calls answered by the extension
Shrt ACD Cnt	The total number of ACD (Ring Group) calls answered by the extension that lasted less than the Short Handle parameter

Table 8:   Extension Now extension statistic column headings (continued)

TERM	MEANING
ACD Hold Cnt	The number of times the extension put ACD (Ring Group) calls on hold
Non ACD Cnt	The total number of Non ACD calls answered by the extension
Non ACD Hold Cnt	The number of times Non ACD calls were put on hold
Out Cnt	The total number of outgoing calls the extension made
Out Hold Cnt	The total number of times the extension put outgoing calls on hold
Calls Per Hour	The average number of incoming ACD calls answered by the extension per hour since the extension was logged in
On Failover	Indicates whether or not the extension has failed over to the secondary media server
Not Present Time	The duration of time the extension was in service but not present in a Ring Group
Avg Handl	The average amount of time the extension spent handling ACD interactions (ACD Time divided by ACD Count, excluding ACD Hold Time)
Occp	The total time the extension spent in an occupied state (occupied state excludes idle time)

VIEWING QUEUE STATISTICS

NOTE: If an agent fails to answer an ACD call after X seconds or X rings or refuses a voice interaction, the agent is placed in Reseize Timer state instead of System Make Busy state. This default behavior can be reset to place agents into System Make Busy state rather than the Reseize Timer state. The system then re-queues the call, in the same queue, and offers it to the next available agent..

The following monitors display queue statistics:

- Queue by Period
- Queue Now
- Queue Group Now

Queue by Period

The Queue by Period monitor collates queue statistics by 15-minute intervals over a 24-hour period. The monitor refreshes each time there is a change in a statistic and each 15-minute interval. The Queue by Period monitor always displays the current 15 minute interval at the top of the monitor. You can specify which columns of statistics are displayed, rearrange columns, and sort individual columns in ascending or descending order. (See Figure 29.)

Figure 29: Queue by Period

Queue by Period column heading definitions

Table 9 describes the Queue by Period column headings.

NOTE: Statistics that do not support Ring Groups display as '0'.

Table 9:   Queue by Period column headings

TERM	ABBREVIATED NAME	MEANING
Interval time	Interval	The 15 minute interval of time
Offered	Offr	The total number of calls offered to the queue during the 15-minute interval
Handled	Hndl	The total number of calls answered by members during the 15-minute interval
Short Abandoned	Shrt Abn	During the 15-minute interval, the total number of calls abandoned before the short abandon time configured against the queue in YourSite Explorer
Abandoned	Abn	The total number of calls abandoned during the 15-minute interval before being answered by members
Interflowed	Intrfl	The total number of calls interflowed during the 15-minute interval
Requeued	Re Q	The total number of calls re-queued during the 15- minute interval **NOTE**: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.

Table 9:   Queue by Period column headings (continued)

TERM	ABBREVIATED NAME	MEANING
% Handled by 1-4	% Hndl by 1-4	A count of all of the calls answered by the first, second, third, and fourth answer points during the 15-minute interval **NOTE**: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
#Handled by 1-4	# Hndl by 1-4	The number of calls answered by the first, second, third, and fourth answer points during the 15-minute interval **NOTE**: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Total Conversation Time	Ttl Conv Time	The total time members spent talking to callers during the 15-minute interval
Average Conversation Time	Avg Conv time	The average time members spent talking to callers during the 15-minute interval
Average Time to Handle	Avg Time Hndl	The average amount of time callers waited in queue before members answered their calls during the 15-minute interval
Average Time to Abandon	Avg Time Abn	The average amount of time callers waited in queue during the 15-minute interval before they abandoned their calls
Average Time to Interflow	Avg Time Intrfl	The average amount of time callers waiting in queue during the 15-minute interval before being interflowed
Service Level % Today	Scv Lvl % Tday	During the 15-minute interval, the percentage of calls answered within the Service Level Time specified for the queue
% Handled	% Hndl	During the 15-minute interval, the percentage of calls answered compared to the total number of calls offered to the ACD queue for the day

Table 9: Queue by Period column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Wrap Up	Wrap Up	The total time the agent spent in the Work Timer state during the 15-minute interval **NOTE**: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Make Busy	Make Busy	The total time the agent spent in the Make Busy state during the 15-minute interval **NOTE**: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Occupancy	Occp	The total time the queue members spent in an occupied state during the 15-minute interval (occupied state excludes idle time)

Queue Now and Queue Group Now

The Queue Now monitor enables supervisors to view queue statistics in real time, as well as expand individual queues in the monitor to view statistics on each queue's associated member agents or extensions. When you expand the Queue Now monitor to display the Name column, the monitor also displays member presence in the queue. Presence is indicated by a colored star in the Present column. A green star indicates the member is present in the queue. A gray star indicates the member is not present in the queue. A gray row indicates that the member is not logged in (for agents and hot desk users) or out of service (for extensions).

The Queue Group Now monitor enables supervisors to view aggregated statistics for Reporting, Virtual, and Unified queue groups in real-time, as well as expand individual queue groups in the monitor to view statistics for the queue group's associated queues.

On the Queue Now monitor, you can specify which columns of statistics are displayed, rearrange columns, and sort individual columns in ascending or descending order. You can expand a queue and view statistics on the members associated with the queue. (See Figure 30.)

NOTE: Prior to Version 7.1, Queue Now monitors displayed the agent groups belonging to the queues with agent group statistics. As of Version 7.1, this functionality has been removed. Instead, queue members are grouped by agent group.

Figure 30: Queue Now

NOTE:

- Contact Center Client updates Longest Waiting statistics every fifteen seconds, or more frequently as records are received from the ACD routing system.

- If the ACD routing system has not updated MiContact Center Business with real-time statistics for Contacts Waiting and Agents Available within the last 90 seconds, question marks display in place of these statistics.

- Agents present in the queue and idle whose extensions are ringing are included in 'Available' statistics. Agents whose extensions are ringing are not included in Unavailable statistics.

- The Average Handling Time is the Average interaction Time plus the Average Hold Time. If the call is put on hold, transferred, or conferenced, these times are added to the Average Handling time value.

- If an agent fails to answer an ACD call after X seconds or X rings or refuses a voice interaction, the agent is placed in Reseize Timer state instead of System Make Busy state. This default behavior can be reset to place agents into System Make Busy state rather than the Reseize Timer state. The system then re-queues the call, in the same queue, and offers it to the next available agent..

- The abandoned media column in the Interactive Visual Queue monitor displays all abandoned calls. The abandoned column in the Queue Now monitor does not include short abandons as abandoned calls. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors.

- Statistics that do not support Ring Groups display as '0'.

Queue Now and Queue Group Now column heading definitions

Table 10 describes the real-time and over-the-business-day Queue Now and Queue Group Now queue and queue group statistics.

NOTE: Statistics that do not support Ring Groups display as '0'.

Table 10:   Queue Now and Queue Group Now queue statistic column headings

TERM	ABBREVIATED NAME	MEANING
Queue Status	Queue Status	The current status of the queue—either Open, Do Not Disturb (DND) or Closed. Open indicates that the queue is available to queue calls. Closed indicates that the queue is not available to queue calls. This is because it is outside of Business Hours or because of a Queue Control Plan condition. Do Not Disturb indicates that the queue has been closed manually using the Set DND command. If the queue also meets the criteria above for a Closed queue, the status will show Closed instead of Do Not Disturb. If licensed for IVR Routing, an additional queue status, Offline, is available. Offline indicates that IVR Routing failed to receive a real-time status from the queue after a set period of time.
Queue Number	Queue #	The queue's reporting number
Queue Group Number	Queue Group #	The queue group reporting number (Queue Group Now only)
Media Server	Media Server	The queue's media server
Queue Name	Name	The queue or queue group name
Contacts Waiting	Contacts Wtg	The current number of interactions in queue waiting for a member to become available, including those listening to silence, music, or recorded announcements
Longest Waiting	Long Wtg	The current duration, in minutes and seconds, of the interaction waiting the longest in queue or queue group
Available (Queue Now) Agents Available (Queue Group Now)	Avail Agts Avail	The total number of members logged in and not in Do Not Disturb, Make Busy, Work Timer, Ringing, Reseize Timer, Unknown, and Offline (Ignite, WEB) **NOTE:** This statistic updates only when members are present to the queue

Table 10:   Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
ACD	ACD	The current number of members handling ACD interactions **NOTE:** This statistic updates only when members are present to the queue
Idle	Idle	The current number of members logged on and ready to receive interactions **NOTE:** This statistic updates only when members are present to the queue
Non ACD	Non ACD	The current number of members handling Non ACD calls (voice only) **NOTE:** This statistic updates only when members are present to the queue
Outbound	Out	The current number of members on outgoing calls (voice only) **NOTE:** This statistic updates only when members are present to the queue
Unavailable	Unavail	The current number of members in Do Not Disturb, Make Busy, Work Timer, or Unknown
Offered	Off	The total number of interactions offered to the queue / queue group
Handled	Hndl	The total number of ACD interactions handled by members
Abandoned	Abn	The total number of interactions abandoned before being answered by members **NOTE:** Abandoned does not peg short abandons as abandoned interactions in the Queue Now monitor. The Abandoned column in the Interactive Visual Queue monitor displays all abandoned interactions. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors.

Table 10: Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Interflowed	Intrfl	The total number of ACD interactions interflowed. Interflow is a mechanism that directs an interaction waiting in queue to another answer point. **NOTE:** If an interaction waiting in queue is redirected before the queue's short abandon time has elapsed, the queue is pegged with a Queue Unavailable count rather than an Interflowed count. In order for the Interflowed peg to occur, the redirection must occur after the short abandon time has elapsed.
Requeued	Re Q	The total number of ACD interactions requeued **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Average Time to Handle	Avg Time Hndl	The average time it takes for the interaction to be taken out of queue by a member
Average Time to Abandon	Avg Time Abn	The current average amount of time customers wait in queue before abandoning interactions
Average Conversation Time	Avg Conv Time	The current average time members spent communicating with interactions
Service Level %	Svc Lvl %	For a queue, this is the percentage of interactions handled within the queue's Service Level Time value over the day For a queue group, this is the lowest percentage of interactions handled within the queue's Service Level Time value over the day across all queues
% Handled	% Hndl	For a queue, this is the percentage of interactions handled compared to the total number of interactions offered to the queue for the day For a queue group, this is the lowest percentage of interactions handled compared to the total number of interactions offered to the queue for the day across all queues

Table 10:   Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
% Handled by 1-4	% Hndl by 1-4	For a queue, this is the percentage of all of the interactions answered by the first, second, third, and fourth agent groups
		For a queue group, this is the highest percentage of all of the interactions answered by the first, second, third, and fourth agent groups
		NOTE: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Total Conversation Time	Ttl Conv Time	The current total time members spend talking to callers
Total Queue Unavailable	Ttl Q Unavail	The total number of times during the day that interactions are rerouted because the queue is in Do Not Disturb or has no members logged in
Current Queue Unavailable	Curr Q Unavail	The current number of interactions are rerouted because no members are logged in or the queue is in Do Not Disturb. Once the queue becomes available, this value resets to 0
Offered Last Hour	Offr Last Hour	The total number of interactions offered to the queue during the last hour of business
Time to Handle Last Hour	Time Hndl Last Hour	The time interactions waited in queue during the last hour of business before being handled by a member
% Handled Last Hour	% Hndl Last Hour	For a queue, this is the percentage of interactions handled in the last hour of business, compared to the total number of interactions offered to the ACD queue for the day
		For a queue group, this is the lowest percentage of interactions handled in the last hour of business, compared to the total number of interactions offered to the ACD queue for the day
Service Level % Last Hour	Svc Lvl % Last Hour	For a queue, this is the percentage of interactions answered or picked within your Service Level Time value in the last hour
		For a queue group, this is the lowest percentage of interactions answered or picked within your Service Level Time value in the last hour

Table 10: Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Handled Last Hour	Hndl Last Hour	The total number of interactions handled by members during the last hour of business
Abandoned Last Hour	Abn Last Hour	The total number of interactions abandoned during the last hour of business
Interflowed Last Hour	Intrfl Last Hour	The total number of interactions interflowed during the last hour of business. Interflow is a mechanism that directs an interaction waiting in queue to another answer point
Unavailable Last Hour	Unavail Last Hour	The total number of times, in the last hour of business, interactions were rerouted because the queue they tried to access was in Do Not Disturb or had no members logged in See Current Queue Unavailable
Average Handling Time Last Hour	Avg Hndl Last Hour	The average duration of interactions from member pick up to client hang up (including hold time) during the last hour of business
Offered Last 15 Minutes	Offr Last 15 Min	The total number of interactions offered to the queue in the last 15 minutes of business
Time to Handle Last 15 Minutes	Time Hndl Last 15 Min	The time interactions waited in queue during the last 15 minutes of business before being handled by a member
% Handled Last 15 Minutes	% Hndl Last 15 Min	For a queue, the percentage of interactions answered in the last 15 minutes of business, compared to the total number of interactions offered to the ACD queue for the day For a queue group, the lowest percentage of interactions answered in the last 15 minutes of business, compared to the total number of interactions offered to the ACD queue for the day
Service Level % Last 15 Minutes	Svc Lvl % Last 15 Min	For a queue, this is the percentage of interactions answered or picked within your Service Level Time value in the last 15 minutes of business For a queue group, this is the lowest percentage of interactions answered or picked within your Service Level Time value in the last 15 minutes of business
Handled Last 15 Minutes	Hndl Last 15 Min	The total number of interactions handled by members during the last 15 minutes of business

Table 10:   Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Abandoned Last 15 Minutes	Abn Last 15 Min	The total number of interactions abandoned during the last 15 minutes of business
Interflowed Last 15 Minutes	Intrfl Last 15 Min	The total number of interactions interflowed during the last 15 minutes of business. Interflow is a mechanism that directs an interaction waiting in queue to another answer point.
Unavailable Last 15 Minutes	Unavail Last 15 Min	The total number of times, in the last 15 minutes of business, interactions were rerouted because the queue they tried to access was in Do Not Disturb or had no agents logged in See Current Queue Unavailable
Average Handling Time Last 15 Minutes	Avg Hndl Last 15 Min	The average handling duration of interactions from interaction pickup to interaction completion, including hold time, during the last 15 minutes of business
% Abandoned	% Abn	For a queue, this is the percentage of interactions that were abandoned (% Abandoned = Interactions Abandoned ÷ Interactions Offered) For a queue group, this is the highest percentage of interactions that were abandoned (% Abandoned = Interactions Abandoned ÷ Interactions Offered)
% Abandoned Last Hour	% Abn Last Hour	For a queue, this is the percentage of interactions that were abandoned in the last hour of business For a queue group, this is the highest percentage of interactions that were abandoned in the last hour of business
% Abandoned Last 15 Minutes	% Abn Last 15 Min	For a queue, this is the percentage of interactions that were abandoned in the last 15 minutes of business For a queue group, this is the highest percentage of interactions that were abandoned in the last 15 minutes of business
Wrap Up	Wrap Up	The total time that agents spent in the Work Timer state **NOTE**: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.

Table 10:   Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Make Busy	Make Busy	The total time that agents spent in the Make Busy state **NOTE**: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Occupancy	Occp	The total time that members spent in an occupied state (occupied state excludes idle time)
# Handled by 1-4	# Hndl by 1-4	The number of interactions answered by the first, second, third, and fourth agent groups **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Logged Out	Logged out	The number of members associated with the queue but not logged in to the system **NOTE**: For Ring Groups, this statistic displays either the number of extensions out of service or hot desk users logged out.
Members Not Present	Not Present	The number of members that are logged into the ACD routing system, but not present in the queue being monitored

Table 11 describes the real-time and over-the-business-day Queue Now and Queue Group Now member statistics.

NOTE: Some statistics in the Queue Now monitor display in the Queue Group Now monitor as member statistics.

Table 11:   Queue Now and Queue Group Now member statistic column headings

TERM	MEANING
State	The queue member's agent or extension state (Queue Now only) For a list of agent and extension states, see "Employee and Agent states" on page 50 and "Extension states" on page 55.
Name	The name of the member being monitored. The icon beside the name indicates the media type the member handles
Present	Indicates whether the member is present in the queue Presence is indicated by a colored star. A green star indicates the agent or extension is present in the queue. A gray star indicates the agent is not present in the queue

**Table 11:   Queue Now and Queue Group Now member statistic column headings
(continued)**

TERM	MEANING
Media Server	The media server to which the member is associated
Reporting	The reporting number of the member being monitored.
Extn #	The base extension where the member logged in (voice agent or hot desk user only)
Log In	The first login of the member's shift. **NOTE:** This statistic displays information for ACD path members only and is not calculated for Ring Group members.
Last Event Recd	The most recent time a member event occurred
Shift Time	The total elapsed time logged for the member, calculated based on the difference between log in and last event received **NOTE:** This statistic displays information for ACD path members only and is not calculated for Ring Group members.
DND Time	The duration of time where Do Not Disturb was the overriding state for the member
MKB Time	The duration of time where Make Busy was the overriding state for the member **NOTE**: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Wrap Up Time	The duration of time where Wrap Up Time was the overriding state for the member. Wrap up time does not include any time spent making or taking interactions during the wrap up timer. **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
ACD Time	The duration of ACD interactions handled, from member pickup to completion (not including hold time)
Hold ACD Time	The duration of time ACD interactions spent on hold
Non ACD Time	The duration of Non ACD interactions handled, from member pickup to completion (not including hold time) (voice only)
Hold Non ACD Time	The duration of time Non ACD interactions spent on hold
Out Time	The duration of time members spent handling outbound calls (voice only)
Out Hold Time	The duration of time outbound calls spent on hold, for members (voice only)

Table 11:   Queue Now and Queue Group Now member statistic column headings (continued)

TERM	MEANING
DND Cnt	The number of times the member entered the Do Not Disturb state
MKB Cnt	The number of times the member entered the Make Busy state **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
ACD Cnt	The number of ACD interactions handled by the member
Shrt ACD Cnt	The number of ACD interactions handled by the member where the handle time was less than the Short Handle parameter
Hold ACD Cnt	The number of times ACD interactions were placed on hold (voice only)
Non ACD Cnt	The number of Non ACD interactions handled by the member (voice only)
Hold Non ACD Cnt	The number of times Non ACD interactions were placed on hold
Out Cnt	The number of outbound calls made by the member (voice only)
Out Hold Cnt	The number of times outbound calls were placed on hold (voice only)
Avg Handl	The average amount of time queue members spent handling ACD interactions (ACD Time divided by ACD Count, excluding ACD Hold Time)
Agt Grp	The agent group to which the agent belongs **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Occupancy	The duration of time the member spent processing interactions
Contacts per Hour	The total ACD interaction count minus the ACD short handle count, divided by the shift time for the member
On failover	Indicates whether the primary media server is offline and has failed over to the secondary media server (voice only)
Unavail%	The percentage of time for the shift that the member was in Do Not Disturb, Make Busy, and Work Timer states
Not Present Time	The duration of time the member was logged into but not present in an agent group or Ring Group
External handle time	The duration of time the member spent handling external calls (voice only)
External inbound cnt	The number of incoming external calls (voice only)

Table 11:   Queue Now and Queue Group Now member statistic column headings (continued)

TERM	MEANING
External outbound cnt	The number of outgoing external calls (voice only)

VIEWING QUEUE CHART STATISTICS

The following charts display queue statistics:

- Queue Now
- Queue Group Now
- Queue Performance by Period
- Queue Group Performance by Period

Queue Now and Queue Group Now

The Queue Now and Queue Group Now charts offer visual representations of Queue Now and Queue Group Now real-time statistics, grouped by the type of statistics displayed. Three different series of statistics are available to view in charts:

- **Integer**—displays numerically-based real-time statistics
- **Percentage**—displays percentage-based statistics
- **Time**—displays time-based statistics

Users can specify which statistics display in their charts. Figure 31 shows an example of a Queue Now chart displaying the Integer series with the default statistics selected.
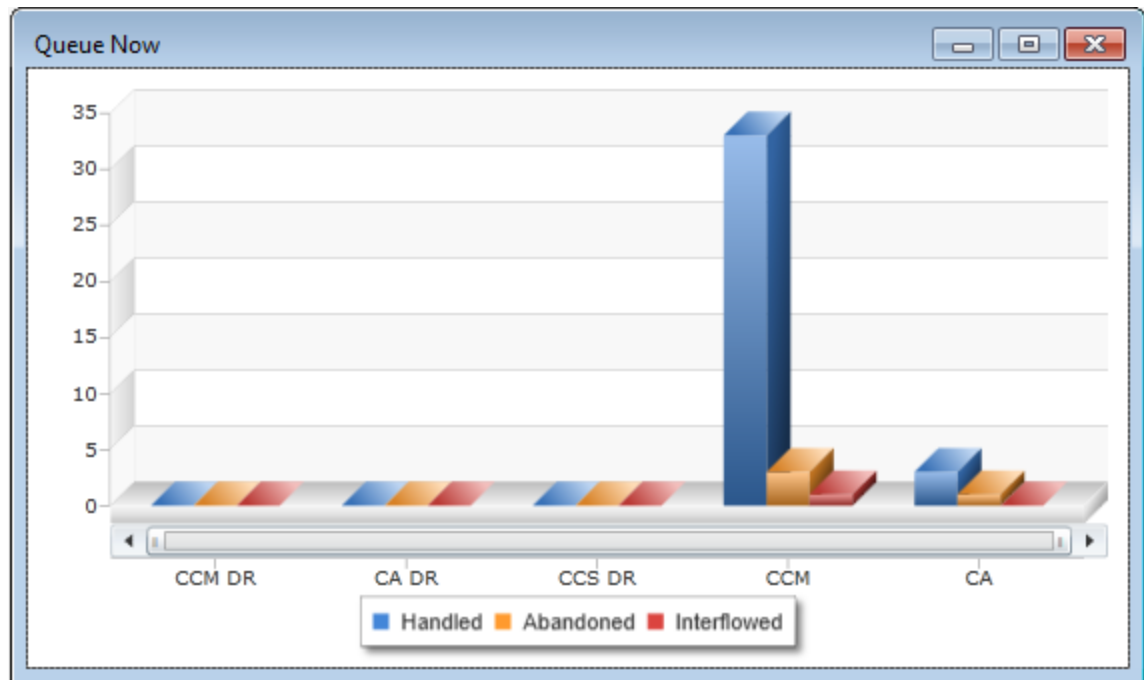
Figure 31: Queue Now (Integer) chart

The Integer chart shows:

- Handled (Default)
- Abandoned (Default)
- Interflowed (Default)
- Calls Waiting
- Agents Available
- ACD
- Idle
- Non ACD
- Outbound
- Unavailable
- Offered
- Requeue
- Total Hour
- Interflowed Last Hour
- Unavailable Last Hour
- Offered Last 15 Minutes
- Handled Last 15 Minutes
- Abandoned Last 15 Minutes
- Interflowed Last 15 Minutes
- Unavailable Last 15 Minutes

- Logged out
- Logged in not present
- # Handled by 1-4

The Percentage chart shows, by default:

- Service Level %
- Handled %
- % Handled by 1-4
- % Handled Last Hour
- Service Level % last Hour
- % Handled Last 15 Minutes
- Service Level % Last 15 Minutes
- %Abandoned
- %Abandoned Last Hour
- %Abandoned Last 15 Minutes.

Time charts show, by default:

- Longest Waiting
- Average Time to Handle
- Average Time to Abandon Minutes
- Average Talk Time
- Ttl Talk Time
- Time to Handle Last Hour
- Average Time to Handle Last Hour
- Hdnl Last 15 Min
- Average Handling Time Last 15 Minutes
- Total work timer minutes
- Total make busy minutes
- Total occupancy minutes

For descriptions of the statistics, see "Queue Now and Queue Group Now column heading definitions" on page 79.

NOTE: The following statistics are for ACD path voice queues only and will not display information for Ring Groups:

- Requeue
- # Handled by 1, 2, 3, 4
- % Handled by 1, 2, 3, 4
- Total work timer minutes
- Total make busy minutes

Queue Performance by Period and Queue Group Performance by Period

The Queue Performance by Period and Queue Group Performance by Period charts offer visual representations of Queue and Queue Group Performance by Period statistics, grouped by the type of statistic displayed. Three different series of statistics are available to view in charts:

- **Integer**—displays numerically-based real-time statistics
- **Percentage**—displays percentage-based statistics
- **Time**—displays time-based statistics

Figure 32 displays a Queue Performance by Period chart displaying the default statistics of the Integer series.
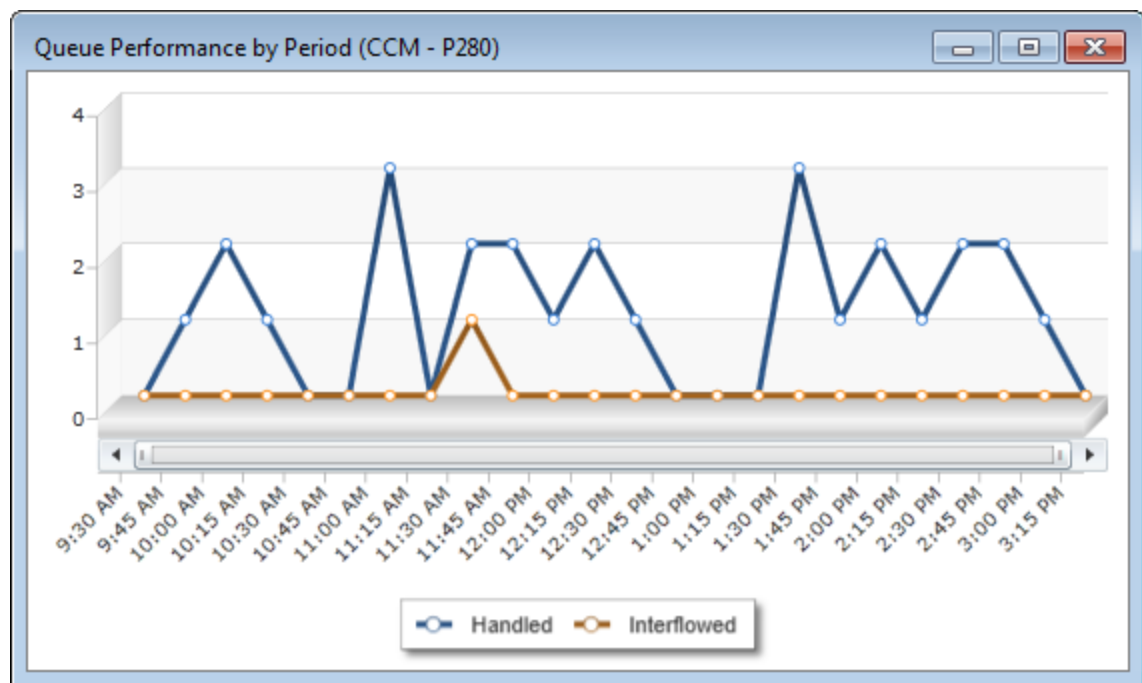
Figure 32: Queue Performance by Period chart

The Integer series shows the following statistics across 15 minute intervals for queues or queue groups:

- Handled (Default)
- Interflowed (Default)
- Offered
- Short Abandoned
- Abandoned
- Requeue
- # Handled by 1-4

The Percentage series shows the following statistics across 15 minute intervals for queues or queue groups, by default:

- % Handled by 1-4
- Service Level % Today
- % Handled

The Time series show the following statistics across 15 minute intervals for queues or queue groups, by default:

- Average Time to Handle
- Average Time to Abandon
- Average Time to Interflow
- Ttl Talk Time
- Average Talk Time
- Total work timer minutes
- Total make busy minutes
- Total occupancy minutes

For more information for the definitions of these statistics, see "Queue by Period column heading definitions" on page 75.

NOTE: The following statistics are for ACD path voice queues only and will not display information for Ring Groups:

- Requeue
- # Handled by 1, 2, 3, 4
- % Handled by 1, 2, 3, 4
- Total work timer minutes
- Total make busy minutes

Navigating charts

You can zoom in and out of charts to change how the data is displayed in the chart, expanding or compressing the displayed data. If the range of data displayed exceeds the boundary of the chart window in Contact Center Client, you can use the horizontal scroll bar to move back and forth across the displayed data.

To zoom in on a chart

1. Hold your mouse over the edge of the horizontal scroll bar until the cursor turns into a double-arrow (<->) icon.
2. Click and drag the edge of the horizontal scroll bar towards the opposite side of the scroll bar. The chart zooms in and the horizontal scroll bar shrinks in size.
   NOTE: To undo the zoom function, click **Zoom Out**.

To zoom out of a chart

1. Hold your mouse over the edge of the horizontal scroll bar until the cursor turns into a double-arrow (<->) icon.
2. Click and drag the edge of the horizontal scroll bar and drag to zoom out.

To show the entire chart in the window

- If you are zoomed in, in the chart window click **Show All**.

To scroll across the chart

- Click and drag the horizontal scroll bar in the direction you wish to scroll the chart.

VIEWING CALLBACK LISTS WITH THE GLOBAL CALLBACK MONITOR

When licensed for IVR, the Global callback monitor enables you to monitor callback states in real time and displays the callbacks currently available. Using the Global callback monitor, you can requeue and delete callbacks. (See Figure 33.)

Monitor Callback List

Caller #	Caller Name	Status	Priority	Reason	Type	# of Attempted...	Last Time Agent...	PrioritySequence	Request Time
1234	Y.Test	Completed	High	Rejected by agent.	Voice	1	7/28/2011 11:41:54 AM		7/28/2011 12:12:11 P
6001	Y.Test	Completed	High	Rejected by agent.	Voice	1	7/28/2011 11:41:41 AM		7/28/2011 12:11:43 P
2365478	Y.Test	Completed	High	Rejected by agent.	Voice	0			
1234	Y.Test	Completed	High	Rejected by agent.	Voice	0			

Figure 33: Global callback monitor

To access the global callback monitor

1. Click the **Real Time** tab in the Contact Center Client ribbon.
2. Click the **Callbacks** icon.
   The Monitor Callback List displays.

Table 12 describes the Global callback monitor column headings.

Table 12:   Global callback column headings

COLUMN HEADING	DEFINITION
Caller number	the phone number provided by the caller
Caller name	the name of the caller
Status	the state of the callback — new request, in progress, requeued, completed, unknown
Priority	the importance level of the callback. Callback priority levels are: • Voice — Normal • Web — Normal • Caller abandoned — Low
Type	the type of callback — voice, web, or caller abandoned
Reason	lists why the callback is in a particular status
Attempted Calls to Agent	the number of times the callback was offered to an agent in queue
Last Time Agent Attempted	the last time the agent attempted the callback
Request Time	the specific time at which the callback is scheduled to be processed; this field is populated when the callback is requeued
Time Received	the specific time the caller submitted the callback request
Web IP Address	the IP address of the caller who submitted the callback request
Last Attempted Call to Client	the specific time the last callback attempt to the caller was made
Attempted Calls to Client	the number of times the callback was attempted
Client Available From	the earliest time the caller is available to receive the callback
Client Available To	the latest time the caller is available to receive the callback

Table 12:   Global callback column headings (continued)

COLUMN HEADING	DEFINITION
ANI	the phone number of the caller
DNIS	the phone number the caller dialed
Dialable	the dialable number of the device that will handle the callback
Device Name	the name of the device that will handle the callback
Device Type	the type of device that will handle the callback — agent, queue, or extension
Recorded Message	contains a hyperlink to the voice callback .wav file left by the caller
Area	the province/state or other area the call originated from
Country	the country the call originated from
Endpoint	the endpoint attempting to perform the callback
Region	the region the call originated from

Managing callbacks in the Global Callback monitor

The Global callback monitor enables users to requeue, reject, and delete callbacks within the monitor. Requeued callbacks are re-entered into their queue. Rejected callback are removed from the queue are will not be offered to employees. Deleted callbacks are removed from the monitor, but are not removed from the system.

Users can also adjust a callback's priority. Callback priority determines the order of which callbacks will be offered to agents. Callbacks are offered to agents in order of their priority and then by the longest waiting callback of that priority. For example, High priority callbacks are offered before Normal priority callbacks, even if the Normal priority callbacks have been in queue longer.

The following procedures explain how to:

- Requeue a callback
- Reject a callback
- Delete a callback
- Change a callback's priority

To requeue a callback

1. Right-click a callback and select **Requeue**.
2. Select **Yes**.

To reject a callback

1. Right-click a callback and select **Reject**.
2. Select **Yes**.

To delete a callback

1. Right-click a callback and select **Delete**.
2. Select **Yes**.

To change a callback's priority

- Right-click a callback and select **Change priority=>[priority level]**.

VIEWING PORTS

NOTE:

- You can monitor port states in real time and view currently executing workflows.
- You can select the ports you want to monitor individually or by hunt group.
- You can remove ports from Do Not Disturb.

The Port Status monitor displays port information.

Port status monitor

The Port Status monitor enables you to monitor port states in real time and displays the workflows that are currently executing on ports. Using the Port Status monitor, you can take ports out of Do Not Disturb and playback historical port events in Auditor mode. (See Figure 34.)

To access the port status monitor

1. Click the **Real Time** tab in the Contact Center Client ribbon.
2. Click the **Ports** icon.
   The Port status monitor displays.

Name	Dialable	Extension Type	Media Server	Hunt Group Name	Hunt Group...	Phone state	Callflow name	Phone Display
PC7050	7050	RAD port 5020 IP	VWM Primary Test			Unknown		WAITING FOR...
RH7556	7556	Messaging port 502	VWM Primary Test			Unknown		
7573	7573	Messaging port 502	VWM Primary Test			Unknown		
7575	7575	Messaging port 502	VWM Primary Test			Unknown		
Redundant Port	7600	RAD port 5020 IP	VWM Secondary Te			Unknown		
Test Rad1	7800	RAD port 5020 IP	VWM Primary Test			Idle		2:01 26-JUL-...

Figure 34: Port status monitor

Table 13 describes the Port Status monitor column headings.

Table 13:   Port Status column headings

COLUMN HEADING	DEFINITION
Name	the name of the port
Dialable	the port's dialable number
Extension Type	the type the extension — RAD, messaging, callback, or UPiQ
Media Server	the media server to which the port is associated
Hunt Group Name	the name of the hunt group the port is associated with. A port can be associated with more than one hunt group
Hunt Group Dialable	the dialable number of the hunt group
Phone state	the state of the phone — idle, dialing, talking, ringing, or unknown
Workflow name	the name of the executing workflow
Phone Display	displays the MiAUDIO state (that is displayed on the phone)
ANI	the phone number of the caller
DNIS	the phone number dialed by the caller
Redirect	the number of the device the call was directed from

VIEWING WEBPAGES

While using Contact Center Client, you can view webpages using the Web browser monitor.

To view a webpage within Contact Center Client

1. Click the **Real Time** tab in the Contact Center Client ribbon.
2. Click the **Web** icon.
   The Web Browser Properties window opens.
3. After **Monitor title**, type a name for the monitor.
4. After **Start URL**, type the address of the website to view.
   NOTE: The website address must begin with http:// or you will not be able to view the monitor.
5. Optionally, select a value for the Web Browser **Refresh Rate**.
6. Click **OK**.

VIEWING HISTORICAL REAL-TIME EVENTS WITH AUDITOR

Using Auditor you can view historical, multimedia real-time events, at your own pace. Auditor makes it easy for you to analyze when and why past service problems occurred. By understanding the series of events you can prevent such issues from recurring.

For example, you notice that on July 15 you have 12 interactions abandon between 10:00 AM and 10:15 AM. You can review the interactions and the agents' actions on that date for that time period with Auditor. Did all of the interactions arrive at the same time? Did all of the agents go on break at the same time? If all of the interactions arrived at once, you need to schedule more people. If all of the agents went on break at the same time, you need to adjust their break schedule.

Using Auditor you can also track when employees log on and log off the system. It is easy to determine if any of the employees consistently start late or finish early.

With Auditor, you can use existing profiles, including alarm thresholds, when viewing past days run in real time.

Your access to Auditor is determined by administrator-set security roles.

The first toolbar consists of real-time monitors that provide information on agent availability, queue statistics, and graphic displays on queues. (See Figure 35.)
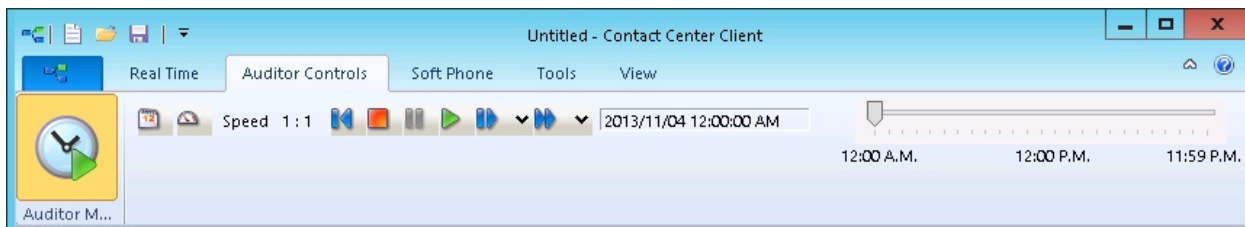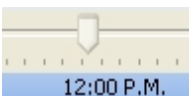
Figure 35: Auditor toolbar

Auditor icons

Using Auditor's second toolbar you select the date of the historical real-time events that you want to view and the speed at which to play the events. The icons are described in Table 14.

Table 14:   Auditor Icons

ICON	TERM	MEANING
	Calendar	You can select the date of the historical real-time events that you want to view by clicking the calendar.
	Speed of audit	The Speed of audit is expressed as a ratio of real-time to play speed. You can select the speed from a list of ratios that opens when you click the clock: 1:1, 1:2, 1:5, 1:10, 1:30, 1:60, and 1:120. If you select the ratio1:1, it will take you one second to view one second of the past day. If you select 1:60, it will take you one second to view one minute of the past day.
	Rewind	If you click Rewind when the play is stopped, you jump back to the beginning of the day.
	Stop	You can stop the real-time historical events from playing, and jump back to the beginning of the day, by clicking Stop.
	Pause	You can pause the real-time historical events by clicking Pause.
	Play	You can play the real-time historical events by clicking Play.
	Step forward	You can select the increment (in seconds) you will advance from a list that opens when you click the down arrow to the right of Step forward: 1 sec, 2 sec, 5 sec, 10 sec, 15 sec, 30 sec, and 45 sec. If you select 30 seconds, then when the play is stopped, you can step forward in 30 second increments each time you click Step forward. When you reach the end of data for that day, you will automatically jump to the end of the day.
	Jump forward	You can select the increment (in minutes) you will advance from a list that opens when you click the down arrow to the right of Jump forward: 1 min, 2 min, 5 min, 10 min, 15 min, 30 min, and 60 min. If you select 10 minutes, then when the play is stopped, you can jump forward in 10 minute increments each time you click Jump forward. When you reach the end of data for that day, you will automatically jump to the end of the day.
	Slider	As you view the events of the day, the slider indicates the time at which the events occurred. The length of the slider represents the length of the day for which you are viewing historical real-time events.

Starting and using Auditor

You start Contact Center Client to gain access to Auditor functionality.

To view historical real-time events, you must

1. Start Contact Center Client.
2. Open the grids in which you want to view historical events.
3. Start Auditor.

NOTE: If you are using the Contact Center Client marquee, Contact Center PhoneSet Manager, Contact Center Softphone, or Interactive Visual Queue applications (which function in real time only), open Auditor in another instance of Contact Center Client.

To start and use Auditor

1. In the Contact Center Client ribbon, click **Auditor Controls**.
2. Click **Auditor Mode** in the toolbar ribbon.
   The Auditor toolbar displays.
3. Click the calendar icon and select a date.
   The date displays on the left of the slider.
4. Click the speed icon and select the speed of the audit.
   The speed of the audit, expressed as a ratio of real time to play speed, displays on the right of the speed icon.
5. Move the slider to select the time of day at which you want to start monitoring.
6. Click the play button to play the real-time events of the selected date.
   The historical real-time events play at the speed you selected.

VIEWING AND CUSTOMIZING REAL-TIME MONITORS

NOTE:

- Contact Center Client has a tabbed interface for managing and arranging windows. You can dock the monitors, displaying them on overlapping tabbed panels to maximize real estate. This enables you to readily navigate between monitors.
- You can save threshold settings and display characteristics you define for monitors. When you click File=>Save, Contact Center Client saves all open monitors under one profile name. You can click File=>Open to open another profile, or File=>New to create a new profile.

Opening monitors

To open a monitor in Contact Center Client

1. In the Contact Center Client ribbon, click **Real time** to view the Contact Center Client monitor icons.
2. In the **State by Position** column on the ribbon, click **Agent**.
   This selects the Agent State by Position monitor and the Add/Remove device IDs window opens.
   See Figure 36.
3. Under **Agent groups**, select agent groups to monitor and/or under Agents, select agents to monitor.

4. Under **Card designs**, select a card design.
Card designs specify the information displayed on extension, agent, and employee monitors.

5. Click **OK**.
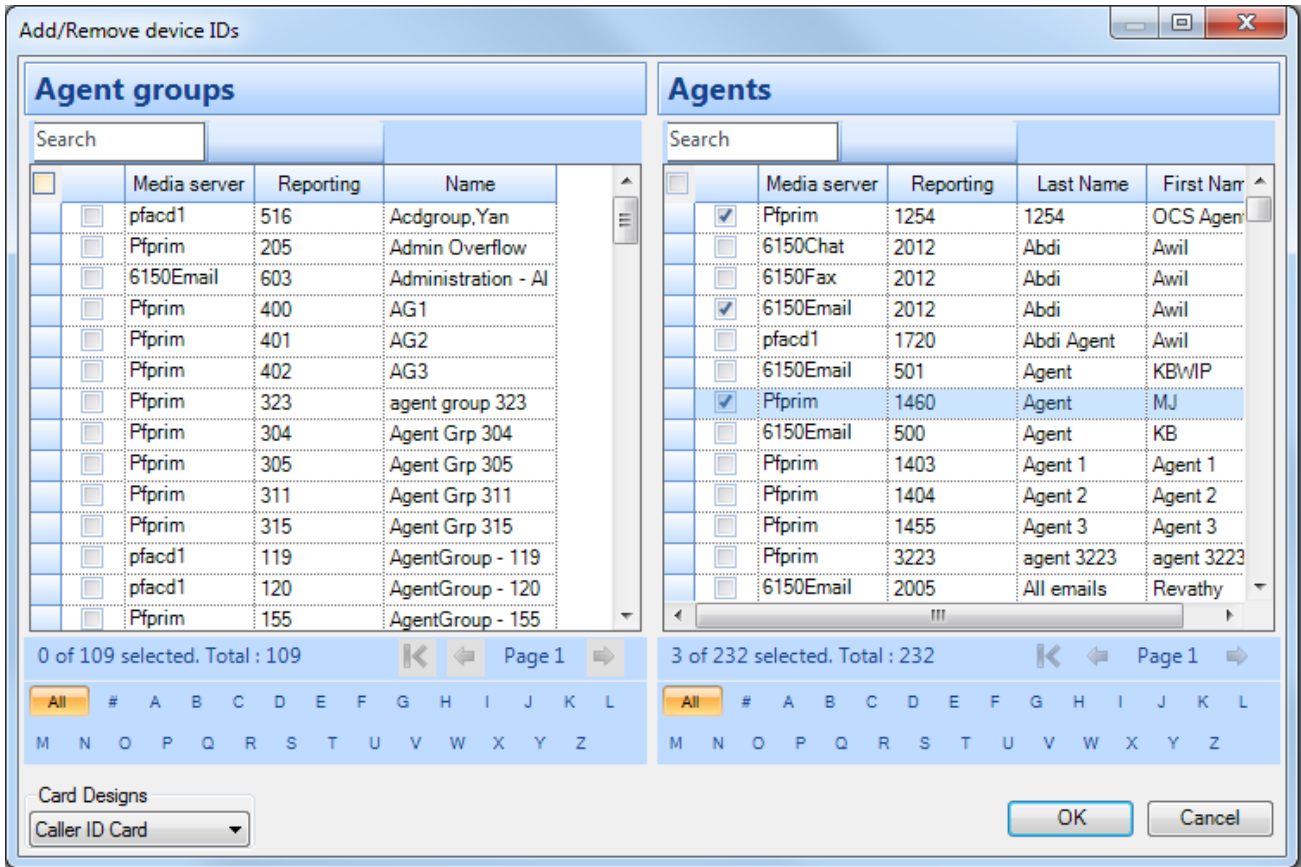
Figure 36: Add/Remove devices

Docking monitors

You can dock monitors and readily navigate between them. You can dock a monitor to the top, bottom, left, or right of another monitor. Alternatively, you can dock a monitor on the top, bottom, left, or right side of the Contact Center Client window. You can dock monitors on top of one another, displaying them on overlapping tabbed panels to maximize real estate.

To dock a monitor on top of another monitor

1. Right-click the title bar of an open monitor and select **Dock**.

2. Repeat step 1 for all open monitors.

3. Click the title bar of a monitor and drag the monitor on top of a second monitor placing your cursor in the center of the four-headed arrow that displays.
See Figure 37.
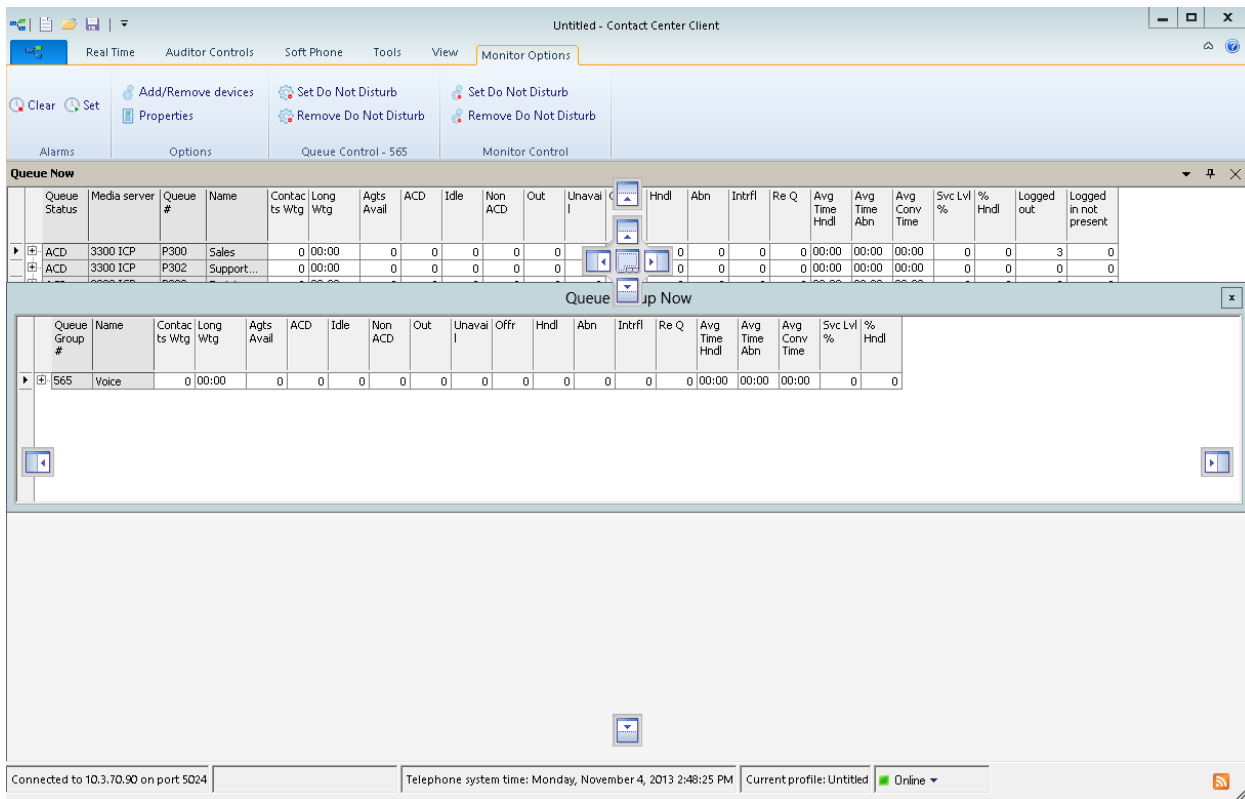
Figure 37: Docking monitors

4. Release the mouse button.

   Your monitors are displayed on overlapping tabbed panels.

   See Figure 38.
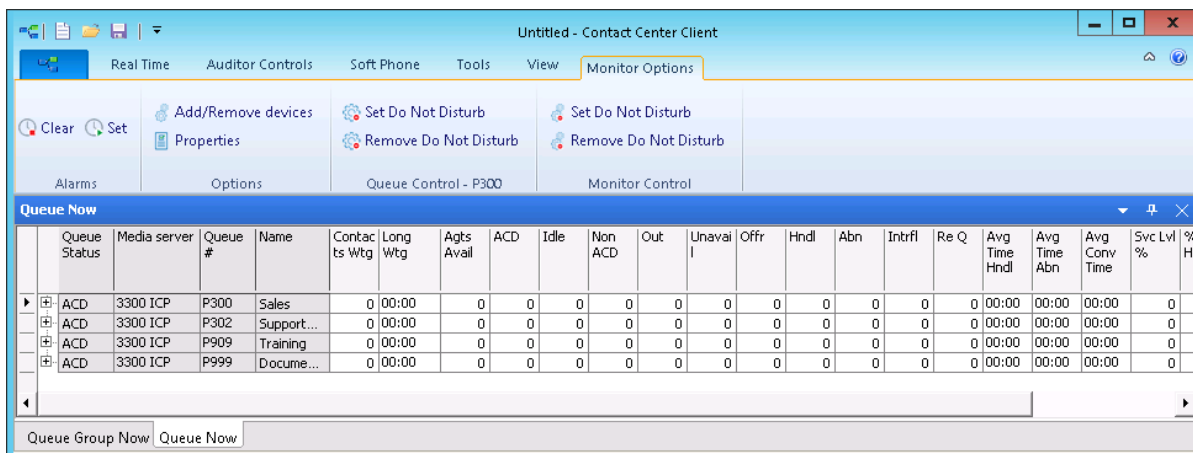
Figure 38: Docked monitor

Adding and removing devices

You can add and remove devices from all of the Contact Center Client monitors except for the chart monitors.

To add devices to the bottom of a monitor

1. Right-click an open monitor and click **Add/Remove devices**.
2. Under **Agent/Employee/Queue groups**, select additional agent, employee, or queue groups to add to the monitor, or under **Agents/Employees/Queues**, select additional agents, employees, or queues to add to the monitor.
3. Click **OK**.
    On the State by Position monitors a blank row of cells separates the original agents from those you just added. To remove the blank row you must sort the monitor.

    See "Sorting monitor devices" on page 104.

To remove devices from a monitor

1. Right-click an open monitor and click **Add/Remove devices**.
2. Under **Agents/Employees/Queues**, clear the check boxes of the agents, employees, or queues to be removed.
3. Click **OK**.

NOTE: You can alternatively add and remove devices via the Monitor Options tab in the Contact Center Client ribbon for the Queue by Period, Queue Now, and Queue Group Now monitors.

Sorting monitor devices

When you select devices to display on a monitor, you can specify the devices be sorted by media server (on agent monitors only), ID, or name (alphabetically) in ascending or descending order. When the monitor opens, the devices display in the order you selected.

To sort the devices displayed on a monitor

- In the left pane of the **Add/Remove devices** window, click **Media server** to sort the members by media server, click **Name** to sort the members alphabetically, or click **Reporting** to sort the members by ID, in either ascending or descending order.

You can sort information by state, name, agent ID, or extension on the State by Position monitors.

To sort agents or employees by state

- Right-click a monitor and click **Sort monitor=>By state**.

If you sort agents by state, Contact Center Client displays the agents by state and time in state across the monitor in the following order:

- Ringing
- ACD
- ACD Hold
- Idle
- Non ACD
- Non ACD Hold
- Outbound

- Outbound Hold
- Do Not Disturb
- Make Busy
- System Make Busy
- Work Timer
- Unknown
- Logged Off

To sort agents or employees by name

- Right-click a monitor and click **Sort monitor=>By name**.

To sort agents or employees by agent ID

- Right-click a monitor and click **Sort monitor=>By agent ID**.

To sort agents or employees by extension

- Right-click a monitor and click **Sort monitor=>By extension**.

Rearranging cells

You can rearrange cells on the State by Position monitors.

To rearrange cells

- On an open monitor, drag a cell to a different position on the monitor.

You can rearrange columns on the Agent Shift, Queue by Period, Queue Now, and Queue Group Now monitors.

To rearrange columns

1. Right-click an open monitor and click **Properties**.
2. Click the **Layout** folder.
3. Click **Column** order.
4. Click a column header and click the up or down arrow key to change the position of the column relative to other columns on the monitor.

NOTE: You can alternatively rearrange cells via the Monitor Options tab in the Contact Center Client ribbon for the Queue by Period, Queue Now, and Queue Group Now monitors.

Setting monitor dimensions

You can specify the numbers of rows and columns of cells to display on the State by Position monitors.

To set table dimensions

1. Right-click a monitor and click **Set table dimensions**.

2. After **Columns**, type a number.

3. After **Rows**, type a number.

4. Click **OK**.
   Columns or rows are added or deleted from the monitor. You can redistribute the cells using a drag-and-drop operation.

To size the table to fit the frame

- Right-click in any real-time monitor and select **Size table to frame**.

Hiding monitor columns

On the Agent Shift, Queue by Period, Queue Now, and Queue Group Now monitors, you can hide specific columns of statistics.

To hide columns

1. Right-click an open monitor and click **Properties**.

2. Click the **Layout** folder.

3. Click **Column order**.

4. In the **Visible** column, clear the check boxes of the columns you want to hide from view.

NOTE: You can alternatively hide monitor columns via the Monitor Options tab in the Contact Center Client ribbon for the Queue by Period, Queue Now, and Queue Group Now monitors.

Filtering device variables

On the Queue Now, Agent Shift, Queue by Period, and Queue Group Now monitors, you can filter specific device variables. For example, on the Queue by Period monitor, you could filter the Calls Offered variable and display statistics for the intervals during which the queue was offered five or more calls.

To filter variables

1. Right-click a monitor and click **Filter device variables**.

2. Click **Filter data to show**, select a variable, select an operand, and type a number.

3. Click **OK**.
   A subset of the data is displayed based on the conditions defined in the filter.

Configuring chart characteristics

Individual charts have a range of configurable characteristics and options that enable users to customize their chart display.

You can right-click charts to access the following options or select them via the Chart Options tab:

- Change the chart types
- Configure the legend
- Configure the color scheme
- Define queue chart properties
- Enable points labels
- Modify Properties

Changing chart type

Contact Center Client enables you to configure the type of chart, either column or line, used for your Queue and Queue Group Performance by Period charts.

Queue and Queue Group Now charts display as bar charts.

1. Right-click on an open By Period chart and click **Chart Type**.
2. Select the type of chart you want your chart to display.

NOTE: Alternatively, you can change the chart type by selecting an open By Period chart, and choosing **Column** or **Line** from the drop-down list beside **Type** in the Chart Options tab.

Configuring the legend

You can choose if your chart has a legend, as well as configure where the legend displays.

To configure the legend

1. Right-click on an open queue chart and click **Legend box**.
2. Select or deselect **Enabled** to either display or remove the legend.
3. Right-click on an open queue chart and click **Legend box**.
4. Click **Left**, **Top**, **Right**, or **Bottom** to determine where you want the legend box to display.

NOTE: Alternatively, you can configure the legend by selecting an open queue monitor and accessing options from the **Legend** section of the **Chart Options** ribbon.

Configuring the color scheme

You can select the color scheme for the chart.

To configure the color scheme for a chart

1. Right-click on an open queue chart and click **Color**.
2. Select the color scheme you want to apply to the chart from the list.

NOTE: Alternatively, you can configure the color scheme by selecting an open queue chart and selecting color options from the drop-down list beside **Color** in the **Chart Options** ribbon.

Defining queue chart properties

Under Chart properties, you can select general chart characteristics, such as colors and stacked effects. You can define series characteristics, such as the type of chart, the fill properties, and the shape of the bars. In addition, you can define y axis characteristics.

To define queue chart properties

1. Right-click an open queue monitor and click **Chart properties**.
2. On the **General** tab, specify general chart characteristics (colors, effects, and 3D).
3. Click the **Series** tab.
4. Specify series characteristics (chart style, fill style, bar type, and border style).
5. Click the **Y Axis** tab.
6. Specify axis scale characteristics, label characteristics, and the width and color of the axis line.
7. Click **OK**.

NOTE: Alternatively, you can configure queue chart properties by selecting an open queue monitor and clicking **Properties** located in the **Chart Options** ribbon.

Enabling point labels

You can enable labels for each point in your chart.

To enable point labels

- Right-click on an open queue chart and click **Points labels**.

NOTE: Alternatively, you can enable point labels by selecting an open queue chart and clicking **Enabled** in the **Points Label** section of the **Chart Options** ribbon.

Modifying Properties

Properties controls the way chart data displays. Under Properties, you can

- Specify the queue chart title
- Highlight statistics
- Configure 2D and 3D displays
- Animate charts
- Select call statistics to display
- Create and modify Constant lines

NOTE: You can either right-click an open queue chart to modify properties or select an open queue chart and choose options via the Properties section of the Chart Options tab.

Specifying the queue chart title

Under Properties, you can specify the title of the queue chart.

To specify the queue chart title

1. Right-click on an open queue chart and click **Properties**.
2. After **Monitor title**, select and delete the old chart title and type a new name for the queue chart.
3. Click **OK**.

Highlighting statistics

Under Properties, you can enable the highlight feature. When the highlight feature is enabled, and when you move your cursor over a bar representing a specific call statistic, that bar is highlighted and the other bars, representing other call statistics, are dimmed.

To highlight statistics

1. Right-click on an open queue chart and click **Properties**.
2. Expand the **Chart properties** tree and click **General**.
3. Select the **Highlight** check box.
4. Click **OK**.

Configuring 2D or 3D chart displays

Under Properties, you can configure whether your chart displays bars in 2D or 3D. By default, your charts display in 3D.

1. Right-click on an open queue chart and click **Properties**.
2. Expand the **Chart properties** tree and click **General**.
3. Select the **3D** check box to enable or disable 3D charts.
4. Click **OK**.

Animating charts

Under Properties, you can enable the animated feature. When the animated feature is enabled, changes to chart values actively display. The animated feature is disabled by default.

CAUTION: Enabling the animated feature will result in additional CPU load on the affected workstation.

To animate charts

1. Right-click on an open queue chart and click **Properties**.
2. Expand the **Chart properties** tree and click **General**.
3. Select the **Animated** check box.
4. Click **OK**.

Selecting call statistics to display

Under Properties, you can select call statistics to display. For example, you can add Calls Waiting, Agents Available, Idle, and Requeued statistics to the Queue Group Now (Integer) chart.

To select call statistics to display

1. Right-click on an open queue chart and click **Properties**.
2. Expand the **Chart properties** tree and click **Series data**.
3. Select the **Series data type** radio button to define the types of data visible in the chart.
   - Integer
   - Percentage
   - Time
4. If you are selecting call statistics for a Queue or Queue Group Performance by Period chart, click **Time Interval**. Select the radio button for the interval you want to use and set the time.
5. Under **Visible**, select the check box of the data you want to add to the chart.
6. Alternatively, under **Visible**, clear the check box of the data you want to remove from the chart.
7. Click **OK**.

Creating and modifying Constant lines

Under Properties, you can configure Constant lines. Constant lines are horizontal lines you configure to display across your chart at set values on the Y-axis, enabling you to clearly see how the data being displayed in the chart meets with desired values.

To create Constant lines

1. Right-click on an open queue chart and click **Properties**.
2. Click **Chart properties**.
3. Click **Constant lines**.
4. Click **Add**.
5. Click in the **Color** box to choose a color.
   NOTE: The default constant line color is red.
6. After **Text**, type the name you want to display beside the constant line in the chart.
7. After **Value**, type the value you want the constant line to mark.
8. After **Width**, select the thickness of the line.
9. Click **OK**.
   The Constant line will be added to the list of active Constant lines.

To modify a Constant line

1. Select the Constant line you want to modify and click **Edit**.
2. After **Text**, type the name you want to display beside the Constant line in the chart.
3. After **Value**, type the value you want the Constant line to mark.
4. After **Width**, select the thickness of the line.
5. Click **OK**.

To delete a Constant line

- Select the Constant line you want to delete and click **Delete**.

SETTING ALARMS

You can define alarms to alert you to significant changes in contact center activity. Using the alarms, you specify performance thresholds for contact center elements, such as queues and agents, and customize the visual, auditory, or email delivery of alarms. If any availability or performance issues arise, your alarms deliver a notification enabling you to instantly change agent and queue availability to adjust to unplanned call volumes.

Client alarms are specific to each computer. To notify you that performance thresholds are not being met, you can configure alarms so that

- Monitor cells and statistics change color.
- A pop-up notification opens on your desktop.
- A sound prompt, such as a beep or .wav file, plays.
- You are notified by email.
- Contact Center Client opens on top of all open applications.

To configure alarms for real-time monitors

1. Add performance thresholds.
2. Specify threshold colors.
3. Specify threshold notification.

Adding performance thresholds

To add performance thresholds so you can monitor alarms

1. Right-click a monitor and click **Set alarms**.
   Alternatively, select an open monitor and click Set alarms in the Alarms column, found in the Monitor or Chart Options tab in the Contact Center Client ribbon.

   The Set alarms window opens.

   NOTE: You can select the **Apply the alarm thresholds to all devices displayed on the monitor** check box to apply the threshold settings for performance variables across all queues or agents. Alternatively, you can select **Apply the alarm thresholds to a specific list of devices** to apply the threshold settings for a performance variable to a list of queues or agents.
2. Under **Devices**, select one or more queues or agents or select the **Select all** check box to select all queues or agents.
3. In the **Performance variables** list, select a variable.
4. Under **Alarm Thresholds**, click **Add threshold** and type a value for the upper boundary of the threshold.
   The lower boundary cannot be modified. The lower boundary of the next threshold is always slightly greater than the upper boundary of the previous threshold.
5. Click **OK**.

Specifying performance threshold colors

To configure performance threshold colors

1. For the alarm threshold for which you want to specify colors, under **Background**, click the arrow.
   A color palate opens.

2. Select a color.

3. Under **Font color**, click the arrow.
   A color palate opens.

4. Select the font color for the alarm threshold.

5. Click **OK**.

Specifying threshold notification

To configure performance threshold sound notification

1. For the alarm threshold for which you want to be notified by a sound, under **Sound**, select the check box.
   The Sound window opens.

2. Specify the alarm triggering properties.

3. Specify the sound you want played when the alarm is triggered.

4. Click **Save**.

To configure performance threshold pop-up window notification

1. For the alarm threshold for which you want to be notified by a pop-up window, under **Pop-up**, select the check box.
   The Pop-up window opens.

2. After **Duration**, type the number of seconds you want the pop-up alarm to be displayed when threshold conditions are satisfied.

3. If you want to display the pop-up alarm on top of all of the other applications, select the **Keep this message visible on mouse over** check box.

4. Optionally, click the **Format font** button to specify font attributes for the pop-up alarm message.

5. In the text box, type the message for the performance threshold and click the **Add variable** button to insert performance variables. (for example, type CW P001 = <calls waiting variable>).

6. Click **Save**.

To specify that Contact Center Client opens on top of all other applications when a performance threshold is satisfied

- For the alarm threshold for which you want to be notified, under **Bring to front**, select the check box.

To configure performance threshold email notification

1. For the alarm threshold for which you want to be notified, or notify others by email, under **Email**, select the check box.
   The Email window opens.

2. After **Distribution**, specify which contacts are to be notified by email when threshold conditions are satisfied.

3. After **Subject**, type the subject of the email to be sent (for example, type Calls Wtg in Sales Queue 1 >10!).

4. In the message box, type the body of the email.

5. Click **Save**.

Consider the threshold programming in Figure 39. When the number of agents available in the technical support queue is between 0 and 2, the cell housing the Agents Available statistic is red. When the number of agents available is between 3 and 4, the cell turns orange. When the number of agents available is 5 or greater, the cell turns white. In addition, audible alarms and pop-up alarms display.

To clear any current client alarms in Contact Center Client

- Right-click the monitor and click Clear alarms.
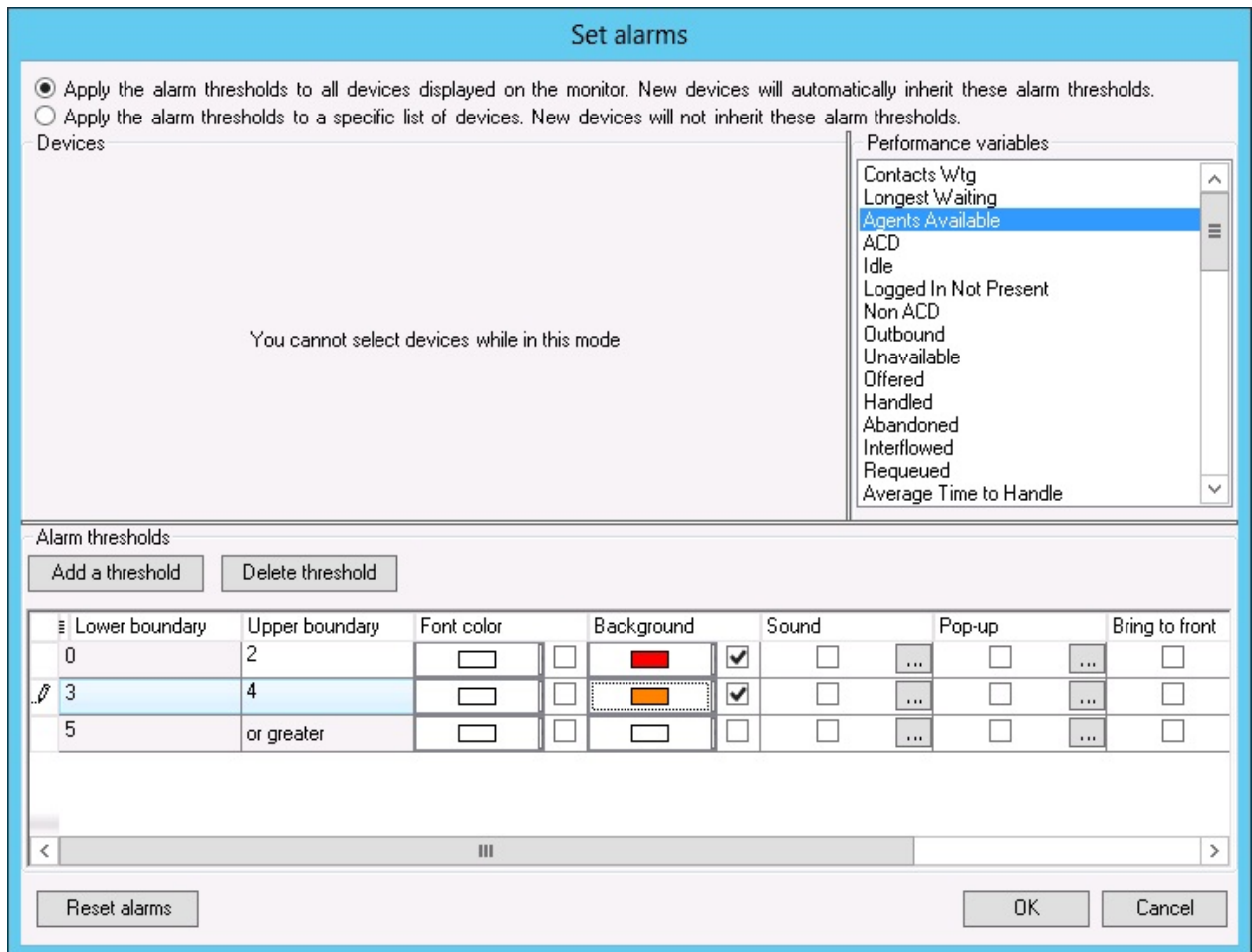
Figure 39: Set alarms window

CUSTOMIZING THE INFORMATION DISPLAYED ON POSITION AND TIME MONITORS

On the agent, employee, and extension by position and by time monitors, real-time information is displayed in cells (cards). You can select from available card designs, or customize cards to display specific information.

When you first open an agent, employee, and extension monitor, you can select a card design on the Add/Remove device IDs window:

- The Classic card displays the agent state, time in the state, presence, agent/employee name, agent login ID/employee ID, and extension number (or queue name for voice agents on ACD or on ACD Hold).

- The Caller ID card displays the caller name and number (ANI), the number the caller/employee dials for incoming/outgoing calls, the state, time in the state, presence, agent/employee name, agent login ID/employee ID, and extension number (or queue name for voice agents on ACD or on ACD Hold.

- Custom cards you create and share

The Caller ID card is the default card design. You can use this card design, or select the Classic card or a customized card. You can create new card designs or copy existing card designs and modify them. For example, you can add or remove text and variables from cards and rearrange the information displayed. You can share card designs with other employees. When you select a card design for an agent, employee, or extension monitor, it is applied to all monitors of that type.

Selecting and customizing card designs

To select a card design

1. Right-click an open position or time monitor and click **Properties**.
2. Click **Layout=>Card design**.
3. Under **Design name**, select a card design.
4. Click **OK**.

To customize cards for position and time monitors

1. Under **Card design**,
   - If you want to create a card design, click **New**.
   - If you want to edit an existing card design, select a card design and click **Edit**.
   - If you want to create a card design based on the Caller ID card or the Classic card, select either card and click **Copy**.
2. On the **New card design** window, type the name of the new card design.
3. If you want to share the design with other agents, select **Share design**.
4. Click **OK**.
5. Select the card and click **Edit**.
   See Figure 40.
6. After **State**, select a state for the card design.
   You can use the same card design for all states or you can customize cards for specific states, such as ACD, Idle, Make Busy, and Unknown.
7. Under **Fields**, select a field type and drag and drop it to the card design.
8. If you want to resize the field, click the field and use your pointer to move or resize the field.
9. If you want to change the properties for a field, click the field and change the properties in the right pane of Card Designer.
10. If you want to change the size of the card design preview, after **Zoom**, select a different magnification value from the list.
11. Add additional fields to the card.
12. Select **Copy to** if you want to copy the current design to the card of a different state.
13. Click **OK**.
    The new card design displays on the Card design list.
14. Click **OK**.
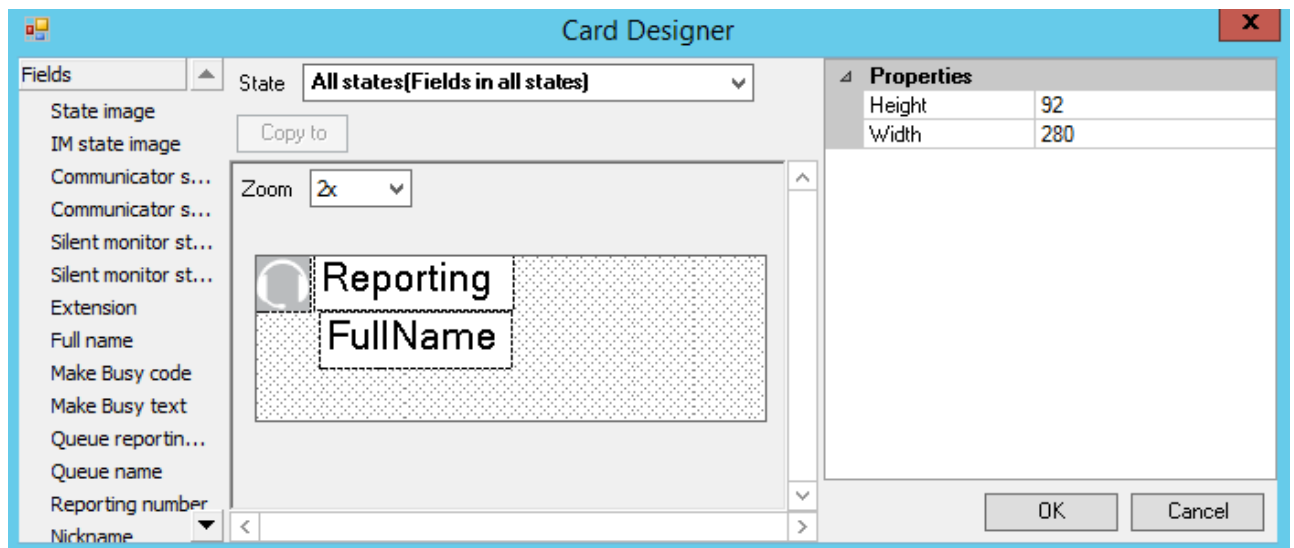
Figure 40: Card Designer window

Defining monitor styles

You can customize the appearance of individual monitor elements. For example, you can configure the font size and color of column headings or apply a skin of predefined colors and font attributes to the entire monitor.

To customize the appearance of monitor elements

1. Right-click an open monitor and click **Properties**.
2. Click **General=>General settings**.
3. If you want to change the title of the monitor, after **Title**, type a name.
4. If you want to scroll horizontally on the monitor, select the **Enable horizontal scroll bars** check box.
5. If you want to scroll vertically on the monitor, select the **Enable vertical scroll bars** check box.
6. If you want to group monitor headings, select the **Enable grouping** check box.
7. If you want to apply a skin to the monitor, click **Layout=>Monitor style**.
8. Click **Load style** and select a skin.
9. Otherwise, under **Properties**, manually configure the column settings, column font, row settings, and row-alternate settings.
10. Click **OK**.

Adding text to card designs

You can use a text box to add custom text to a card.

To edit text that you have added to a card

1. Select the text box.
   Properties displays on the right.
2. Under **Properties**, in the box to the right of **Text**, type the text to be added to the card.
3. Click **OK**.
4. Click **OK**.

Grouping data

You can group rows of data in the Queue Now monitor, and other monitors that contain columns. For example, you can group the data by the ACD count statistic and readily see which agents handled the most calls, and which agents handled the least calls, as illustrated in Figure 41.

Figure 41: Enable grouping

The Enable grouping option displays a grouping panel to which users drag columns. The grouping order determines the order in which the rows display.

To enable grouping

1. Right-click an open monitor and click **Properties**.
2. Select the **Enable grouping** check box.
3. Click **OK**.
   The monitor displays a grouping panel.
4. Drag a column heading to the panel to group by the column heading.

BUILDING MARQUEE MONITORS

You can build marquee monitors to broadcast real-time statistics and messages and alarm on real-time contact center performance statistics. With marquee monitors and wall-mounted marquee displays, such as LCD monitors or LED reader boards, you can offer your supervisors and agents access to important contact center performance metrics.

To build a marquee monitor, you must

- Specify styles for the marquee monitor.
- Configure marquee text and variables.

Configuring marquee monitor styles

To specify attributes for the marquee background

1. Click the **Marquee** icon.
   The Configure marquee window opens.

2. Click **Add a message**.
   The Add a message window opens.

3. Type a name for the message.

4. Under Position, select **Top**, **Right**, **Left**, **Center**, or **Bottom** to specify how the message is to be displayed on the marquee.

5. Click **Format marquee**.
   The Format marquee window opens.

6. After **Background color**, select a color for the background.

7. After **Cell color**, select a color for the marquee cells.

8. After **Cell size**, specify a value for the size of the marquee cells.

9. After **Cell spacing**, select a value for the space between marquee cells.

10. To specify the marquee text font type and color, click **Format font**.
    The Font window opens.

11. Select font attributes.

12. Click **OK**.

13. If you want the message and the background of the message to be displayed using pixels, select the **Matrix style** check box.

14. Click **OK**.

15. Click **OK**.
    The marquee displays.

    NOTE: You must configure marquee text and variables. See "Configuring marquee text and variables" on page 119.

Configuring marquee text and variables

To configure text and variables for the marquee

1. Right-click the marquee and click **Configure marquee**.
   The Configure marquee window opens.

2. In the **Message editor** text box, type a message to display on the marquee (for example, type Calls Wtg =).

3. Under **Message editor**, click the **Add variable** button.
   The Add/Edit variable window displays.

4. Click **Add**.
   The Configure variable window opens.

5. Under **Variable types**, click the monitor type to which the variable applies.

6. Under **Variables**, click a variable.
   NOTE: The following queue variables will not supply information for Ring Groups:

   - % Handled by 1, 2, 3, 4
   - Dial Out of queue
   - Requeued

   NOTE: The Extension variable is available in the list, when you add this variable, this will be displayed blank in the marquee as extensions are not reported on a SIP platform.

7. Under **Devices**, select the check box of a device.

8. Under **Thresholds**, click **Add threshold** and specify a value for the upper boundary of the first threshold.

9. Click **OK**.

10. For the threshold, under **Variable**, select a color to be displayed in the marquee message string.

11. For the threshold, under **Message**, select a color for the text that will precede the variable in the marquee text string.

12. After **Type a name for the variable**, type a name.

13. Click **OK**.

14. On the **Configure marquee** window, in the **Message editor** text box, position your pointer where you want to add the variable.

15. You can add variables at the beginning, middle, or end of message strings.

16. On the **Add/Edit variable** window, double-click the variable to add it to the message string. Click the **Add** variable button.
    The Add/Edit variable window opens.

17. Click the **Configure transition effects** button and select the check boxes for the transition effects to be included.

18. Click **OK**.
    The marquee displays, showing the text you typed and a real-time value for the performance variable. You can define additional thresholds for the performance variable, and add additional variables to the marquee.

USING CONTACT CENTER CHAT

Contact Center Client provides instant messaging capabilities for both supervisors and agents and is typically used by contact center employees only. Contact Center Chat provides the online chat presence of contact center employees, including Online, Offline, and Away. Agents can view the availability and presence of other contact center employees before they transfer calls or send online chat messages.

Using Contact Center Chat, you can communicate essential information to one or more agents, agent groups, or supervisors quickly and securely. You can coach agents and send timely messages, such as asking an agent to delay going on break when it is busy.

NOTE:

- You must have a security role that does not restrict you from gaining access to Contact Center Chat.
- You must log on to Contact Center Client in order to send and receive online messages.
- When you receive a message it is displayed immediately on top of all open windows.

Sending a Contact Center Chat message

On an extension, agent, or employee monitor you can right-click an agent's cell and click Send instant message to send an online message to the agent.

To send a chat message

1. Double-click your presence indicator in Contact Center Client's Status Bar. Contact Center Chat opens. (See Figure 42.)
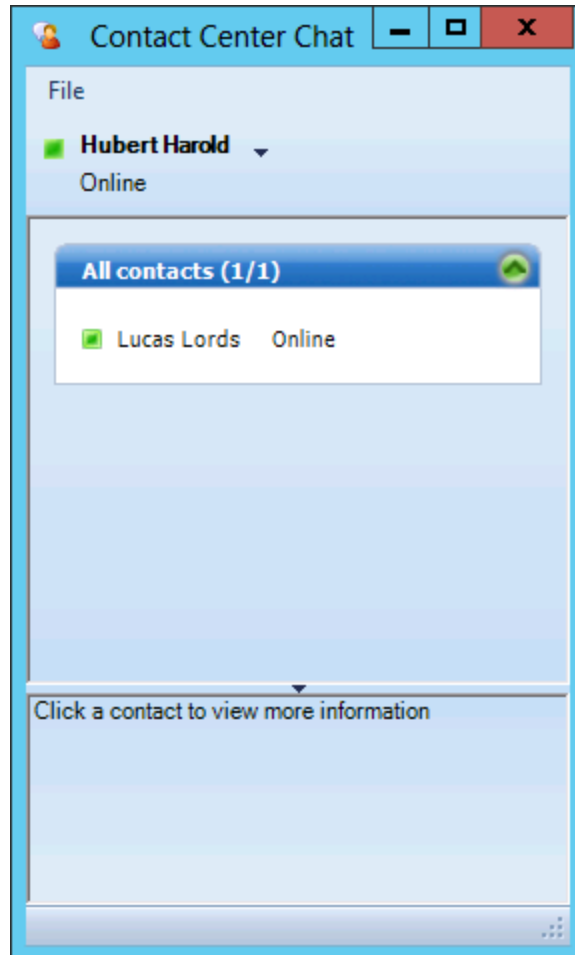
Figure 42: Contact Center Chat

2. Right-click a contact and select **Send an instant message**. Alternatively, double-click the contact.

    The Conversation window opens.

3. Type a message.

4. Click **Send**.

To send a chat message while viewing an extension, agent, or employee monitor

1. Right-click a cell in an open monitor and click **Send instant message**. Alternatively, double-click the presence indicator in the extension, agent, or employee's cell in the monitor. The Conversation window displays.

2. Type a message.

3. Click **Send**.

Adding someone to an interaction

To add someone to an interaction

1. On the **Conversation** window, click the **Add Participants** button to join this **conversation** icon.
2. Double-click a contact to add the contact to the interaction.
3. Click **Send**.

Responding to a Contact Center Chat message

Agents and supervisors can receive Contact Center Chat messages only if they are logged on to Contact Center Client. When someone sends a Contact Center Chat message to you, the Conversation window opens and a desktop notification appears in the bottom-right of your monitor. The desktop notification shows the name and presence of the employee contacting you and their message. Figure 43 illustrates a chat notification.
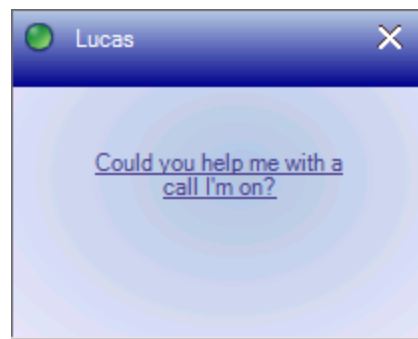
Figure 43: Desktop Chat notification

To respond to a chat message

1. Type a message.
2. Click **Send**.
   Contact Center Chat sends your response to all chat session participants.

USING CONTACT CENTER CHAT WITH SKYPE FOR BUSINESS

With the addition of Microsoft Skype for Business Server agents and supervisors use Skype for Business as their default instant messaging client. The presence of all company employees is natively delivered in Contact Center Client. Contact center employees can view the presence of both internal and external contacts to determine if they are available to communicate. In addition to Available, Offline, and Away, employees see In a Meeting, Busy, In a call, Do Not Disturb, Be Right Back, and other Skype for Business presence indicators.

NOTE: In order to use Contact Center Chat with Skype for Business, you must enable Contact Center Chat and have Skype for Business open and running.

If an agent views an employee on a real-time monitor and notes the employee is online, the agent can right-click the employee and send an instant message.

Table 15 provides details on the presence indicators that are available when Contact Center Client is used in conjunction with Skype for Business Client and Contact Center Chat with Skype for Business.

Table 15:   Skype for Business presence indicator icons

2013 PRESENCE ICON (LARGE)	2013 PRESENCE ICON (SMALL)	STATUS TEXT	DESCRIPTION
		Available	The contact is online and can participate in interactions. Users can manually set this status, but the next automatic state change will override this setting.
		Busy	The contact is available, but is engaged by another activity. Busy contacts will not be routed ACD calls, but may receive Non ACD calls. Possible activities include the following: **In a Call**—the contact is in a phone, voice, or video interaction. **In a Meeting**—the Outlook calendar shows that the contact has a scheduled meeting. Users can manually set this status.
		Do Not Disturb	The contact is engaged by another activity and is unavailable. Contacts in Do Not Disturb will neither receive ACD or Non ACD calls. Users can manually set this status.

Table 15:   Skype for Business presence indicator icons (continued)

2013 PRESENCE ICON (LARGE)	2013 PRESENCE ICON (SMALL)	STATUS TEXT	DESCRIPTION
		Away / Inactive Be Right Back Off Work	The contact is likely unavailable. Possible reasons include the following: The contact's computer has been idle for more than the away time period setting (5 minutes by default). **NOTE:** By default, the transition from Available to Inactive occurs after 5 minutes. Then, after five more minutes, the status changes to Away if there is still no activity on the computer. The contact's Outlook calendar or Out of Office Assistant indicates that they are out of the office. The contact is temporarily unavailable **NOTE:** As soon as activity is detected on the contact's computer, Ignite automatically resets the presence status to the appropriate state. The contact has locked their computer. The contact has manually set their presence to Away or Be Right Back. Users can manually set this status. **NOTE:** When a user manually sets themselves as Away, they are still available to receive calls, such as from a transfer.
		Offline	The contact is not available. Possible reasons for this include the following: The contact has manually set their presence status to Appear Offline. The contact has not signed into Skype for Business. The contact has blocked you from seeing their presence status. Skype for Business is not running on the contact's computer.

Table 15: Skype for Business presence indicator icons (continued)

2013 PRESENCE ICON (LARGE)	2013 PRESENCE ICON (SMALL)	STATUS TEXT	DESCRIPTION
	☐	Presence unknown	Skype for Business cannot determine the status of the contact. This status is typically displayed because the contact's presence status is unavailable to Skype for Business, such as for a contact who is part of an organization that is not a federated partner.

Sending an instant message

On an agent or employee monitor, you can right-click an agent or employee's cell and click Send instant message to send an online message to the agent or employee. You can also send instant messages using Microsoft Skype for Business. Using Skype for Business, you can send instant messages to individuals or multiple contacts. After initiating an interaction, you can invite additional contacts to the interaction. For instruction in using Skype for Business, consult your Microsoft Skype for Business documentation.

NOTE: Supervisors send instant messages to contacts or groups of contacts using Contact Center Client.

To send an instant message while viewing agents on an extension, agent, or employee monitor

- Right-click a cell in an open monitor and click **Send instant message**.
  A Skype for Business Conversation window opens.

HOT DESKING PROFILE SETTINGS

When an agent is configured as a Mitel hot desking agent, the agent can sit at any extension on the network and log on to the extension. After the agent is logged on, the agent takes control of the extension. The agent's Contact Center Client and soft phone real-time profile settings are available. Any previous associations with the extension are taken out of service. When an agent logs off, the agent disconnects from the extension and the default settings for the extension are restored automatically.

WARNING: If an external hot desk agent is using a personal phone to handle calls, incoming calls that are not answered could reach their personal voicemail.

POSTING FEEDBACK AND VIEWING OUR FORUMS

Mitel has partnered with UserVoice, a third-party service, to host customer suggestions on https://micontactcenter.uservoice.com. When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Our forums enable you to send feedback directly to the people building the product. While we cannot comment on every suggestion, feedback is analyzed and considered for future releases.

NOTE: Please do not use the forums to submit product defects. To submit product defects, please contact your administrator or dealer.

Feedback can also be submitted directly to Mitel without posting the suggestion on the forums. For more general feedback, you can also provide a rating of your experience with MiContact Center Business.

NOTE: Please do not use feedback for requesting customer assistance. For assistance with MiContact Center Business, please contact your dealer or Mitel Customer Support.

To post feedback and view our forums

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Got an idea? Tell us**.
   OR

   Access the following URL: **https://micontactcenter.uservoice.com.**

To submit feedback directly

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Contact Us**.

To rate your Mitel experience

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Rate us**.

ACCESSING REAL-TIME INFORMATION WITH IGNITE (WEB)

Ignite (WEB) enables real-time monitoring of employees, agents, queues, and callback requests. The Ignite (WEB) real-time monitors do not duplicate those available in Contact Center Client but, instead, offer a succinct set of the most essential statistics in the highly accessible online format of Ignite (WEB).

The following real-time monitors are available in Ignite (WEB):

- Employee State
- Agent State
- Queue Now
- Callback Requests

To access the real-time monitors in Ignite (WEB)

1. In Ignite (WEB), click **Dashboards**.
2. Click the down arrow and select the dashboard from the list that contains the monitor you want to display.

NOTE:

- Alarms are not supported for real-time monitors in Ignite (WEB).
- Access to real-time monitors is determined by administrator-set security roles.

To learn how to add and configure settings for real-time monitors in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 244.

MONITORING EMPLOYEE STATE IN IGNITE (WEB)

The Employee State monitor available in Ignite (WEB) enables you to view activity and, if enabled for Interactive Contact Center, adjust presence for individual employees in your contact center.

You can view the following real-time employee information:

- Employee name, reporting number, and avatar
- ACD availability and state (with colored state icon)
- Busy duration for the day
- Do Not Disturb duration for the day
- Number of interactions handled for the day (voice, email, chat, SMS, open media as applicable)
- Date/Time of first login
- Total shift duration

NOTE: Only one employee at a time can display in the Employee State monitor but you can optionally add several employee monitors to a dashboard to access information for multiple employees.

The Employee State monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard. To learn how to add and configure settings for the Employee State monitor in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 244.

MONITORING AGENT STATE IN IGNITE (WEB)

The Agent State monitor available in Ignite (WEB) enables you to view the real-time state of agents in your contact center and, if enabled for Interactive Contact Center, adjust agent presence.

Each column lists agents in order of time in state, with the longest in state at the top. For example, the agent at the top of the Idle column is the next longest idle agent and should receive the next inbound interaction.

The following table lists and describes real-time agent state information that displays in the Agent State monitor in Ignite (WEB).

Table 16:   Agent State monitor statistics - Ignite (WEB)

STATISTIC	DESCRIPTION
ACD	includes agents in ACD and ACD Hold
Idle	includes agents who are available for ACD but currently not handling any interactions
Non ACD	includes agents in Non ACD, Non ACD Hold, Outbound, and Outbound Hold
Unavailable	includes agents in Do Not Disturb, Busy, Work Timer, and Reseize Timer
Not Present	includes agents who are logged in as an agent but not present in any agent groups
Offline	includes agents who are logged in as an ACD agent

The Agent State monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard. To learn how to add and configure settings for the Agent State monitor in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 244.

MONITORING QUEUES IN IGNITE (WEB)

The Queue Now monitor available in Ignite (WEB) enables supervisors to view queue or queue group statistics and a summary of current agent states for each queue or queue group in real time.

Queue statistics include Offered, Service Level %, Interactions Waiting, Requeued, and Longest Waiting. Handled, Interflowed, and Abandoned counts can also be accessed by hovering over 'Offered' for each queue or queue group.

The following table lists and describes queue statistics that display in the Queue Now monitor in Ignite (WEB).

Table 17:   Queue Now monitor statistics - Ignite (WEB)

STATISTIC	DESCRIPTION
Offered	the total number of interactions offered to the queue or queue group
Service Level %	for a queue, this is the percentage of interactions handled within the queue's Service Level Time value over the day for a queue group, this is the lowest percentage of interactions handled within the queue's Service Level Time value over the day across all queues
Contacts Waiting	the current number of interactions in queue waiting for a member to become available, including those listening to silence, music, or recorded announcements
Requeued	the total number of ACD interactions requeued **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'
Longest Waiting	the current duration, in minutes and seconds, of the interaction waiting the longest in queue or queue group
Handled	the total number of ACD interactions handled by members
Interflowed	the total number of ACD interactions interflowed interflow is a mechanism that directs an interaction waiting in queue to another answer point **NOTE:** If an interaction waiting in queue is redirected before the queue's short abandoned time has elapsed, the queue is pegged with a Queue Unavailable count rather than an interflowed count. In order for the Interflowed peg to occur, the redirection must occur after the short abandoned time has elapsed
Abandoned	the total number of interactions abandoned before being answered by members **NOTE:** Abandoned does not peg short abandons as abandoned interactions in the Queue Now monitor. The Abandoned column in the Interactive Visual Queue monitor displays all abandoned interactions. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors

The current number of agents, by state, also displays for each queue or queue group for the following agent states:

- **Idle:** includes agents who are available for ACD but not currently handling any interactions
- **ACD:** includes agents in ACD and ACD Hold
- **Non-ACD:** includes agents in Non ACD, Non ACD Hold, Outbound, and Outbound Hold
- **Unavailable:** includes agents in Do Not Disturb, Busy, and Work Timer

The Queue Now monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard. To learn how to add and configure settings for the Queue Now monitor in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 244.

VIEWING AND MANAGING CALLBACKS IN IGNITE (WEB)

When licensed for IVR, the Callback Requests monitor, available in Ignite (WEB), enables you to interact with callbacks and monitor their state in real time.

The Callback Requests monitor enables users to requeue, reject, and delete callbacks from within the monitor. Requeued callbacks are re-entered into their queue. Rejected callbacks are removed from the queue and will not be offered to employees. Deleted callbacks are removed from the monitor, but are not removed from the system.

To requeue, reject, or delete a callback

- In the row of the call you want to interact with, in the **Actions** column, left-click either **Requeue**, **Reject**, or **Delete**.

The following table lists and describes the statistics available in the Callback Requests monitor.

Table 18:   Callback Requests monitor statistics - Ignite (WEB)

STATISTIC	DESCRIPTION
Name	the name of the caller
Number	the phone number provided by the caller
Status	the status of the callback
Offer At	the specific time the callback will be executed
Received	the specific time the caller submitted the callback request
Preferred Time	the time the caller is available to receive the callback (if the caller does not enter a preferred time, this column will be blank)
Destination	the queue, agent, and extension for which the callback is intended
# of Attempts	the number of times the callback has been attempted
Last Attempted	the specific time the last callback attempt to the caller was made
Actions	within this column, you can choose to requeue, reject, or delete a callback

The Callback Requests monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard. To learn how to add and configure settings for the Callback Requests monitor in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 244.

Chapter 6
FORECASTING

Forecasting terms

Forecasting tool

FORECASTING

Forecasting is the basis of estimating required resources to handle a contact center's workload. Using historical data generated by the ACD routing system for both voice and other media types, forecasting allows you to adjust key modifiers to predict the number of agents required, by interval, to handle the predicted workload.

The Forecasting tool available in Contact Center Client and Workforce Scheduling enables users to quickly choose historical data from both voice and multimedia queues or queue groups to use in the forecast, providing average transaction traffic by day of week, by media, as well as by historic manned agents and handling statistics for user-selected intervals of time. Supervisors can create forecasts based on historic contact center volumes and manually adjust various modifiers to generate hypothetical or future anticipated traffic scenarios, optimizing the balance between the agents required to handle the anticipated traffic with the expected handling time, wrap up time and Service Level objectives. The Forecasting tool lets you adjust key statistics together with intra-day contact volumes rather than only daily statistics which provides a much more accurate output of agents required per interval. For example, you may have a situation where calls coming into your call center are more complex earlier in the day and/or earlier in the week creating a higher demand for agents to be available at these times. It is possible that handling time drops throughout the day and the demand for agents reduces, allowing for alternate options for agents such as off line work, team meetings or performance reviews.

Your ability to forecast is limited only by the available ACD routing data collected and available in your SQL database. For example you may choose to take the last few weeks to help predict the next few weeks or you could take the last year to help predict the average traffic per week, or you might want to only take the period of time in the past where you ran a particular campaign/season to anticipate the amount of traffic to expect for a similar upcoming campaign/season, etc. After you run a forecast, you could examine the data and make adjustments based on current or anticipated contact center conditions. You could then tweak the forecast as required.

NOTE: Ring Groups are not supported with Forecasting, either as queues or as a member of a reporting queue groups.

FORECASTING TERMS

Conducting a forecast involves accurately estimating Time to Handle, Wrap Up Time, and Contacts Offered values. The following terms are used in forecasting resource requirements:

- **Service Level percent**
  Service Level Percent = Service Level Count ÷ ACD offered

  For calls and chats, the Service Level Percent is the number of interactions that are handled, abandoned, and interflowed before a defined threshold time (Service Level time), compared to the total number of Multimedia Contact Centers handled, abandoned, and interflowed. The Service Level Percent = (Handled + Abandoned (long) + Interflowed (long)) within the Service Level time ÷ Total (Handled + Abandoned (long) + Interflowed (long)).

  For email and SMS, the Service Level Percent is the number of interactions that are handled and interflowed before a defined threshold time (Service Level time), compared to the total number of interactions handled and interflowed. The Service Level Percent = (Handled + Interflowed (long)) within the Service Level time ÷ Total (Handled + Interflowed (long)).

- **Service Level time**
  Service Level Time is the time used in calculating the Queue Service Objective. For example, your Queue Service Objective may require queue members to handle 80% of interactions within 120 seconds. 120 seconds is the Service Level Time. Queue Service Objectives, which includes Service Level Time, are specified for individual queues.

- **Wrap Up time**
  Wrap Up Time is a real-time and reporting statistic detailing the total time an agent spends in the Work Timer state. The Wrap Up Time is a standardized period. If an agent requires additional time to complete paperwork or online transactions, the agent can leave the ACD queue temporarily for this purpose.

- **Agent Efficiency percent**
  Agent Efficiency percent is the percentage of time agents spend on ACD interactions relative to the time agents are scheduled to work. Agent efficiency is calculated using a straight linear relationship. For example, 50% agent efficiency means that two more agents are required to handle the forecasted workload. An Agent efficiency percentage of 100 is unrealistic. Agents routinely take breaks, perform other Non ACD duties, make outgoing calls, and place themselves in Make Busy.

- **Contacts Offered**
  You can predict the queue member requirement for your Service Level percent and Service Level time targets by applying the Erlang C equation to the estimated Call Load and average ACD Handling Time.

- **Manned Agents**
  Manned Agents is the average number of agents who were logged on for the interval of time being forecasted.

- **Average Handle Time**
  Average Handle Time is the average time queue members spend handling interactions, and is determined by comparing the interaction duration to the number of interactions offered.
  NOTE:
    - The Average Handle Time in the Forecasting tool is calculated differently than the Average Handling Time in CCMWeb reports, which is determined by comparing interaction duration to the number of interactions answered.
    - The Daily Average Handle Time in the Forecasting tool is calculated from the interval rows in the forecast and may differ from the Average Handling Time for that day in contained in a report.

- **Time to Handle**
  Time to Handle is the average time calls wait in queue before being handled.

- **ACD Handling Time**
  ACD Handling time is the talk time plus the hold time. If a queue member calls a supervisor in search of more information (while the caller is on hold) and/or transfers or conferences the call, the system adds these times to the ACD Handling Time value.

- **Call Load**
  The term *Call Load* is to the combined effect of the number of interactions received by the ACD queue and their duration, or the calls offered x (average ACD Handling Time + average Wrap Up Time).

FORECASTING TOOL

The Forecasting tool is accessed via Contact Center Client. If you are licensed for Workforce Scheduling, you can also access it in that application under the Tools tab. In order to access the Forecasting tool, your security role must have the 'May manage Forecasting' option enabled.

You use the Forecasting tool to create forecasts based on historical contact center traffic volumes. After loading historical data into the tool, you can perform 'what-if' scenarios and optimize the balance between the agents scheduled and your Service Level objectives.

The Forecasting tool offers a tabbed interface for viewing and setting historical data for each day of the week. If more than one media type has been included in the historical data, each day's tab will have a section for each media type included in the historic data. The forecast grid is divided into rows based on the interval time selected when loading historical data, enabling users to adjust statistics by 15, 30, or 60 minute intervals. The statistics have Historic and Current values, which display the original values from the loaded historical data and the current values after user modification respectively.

After a forecast has been performed, each day lists the agents required for each interval. Figure 44 shows the Forecasting tool.
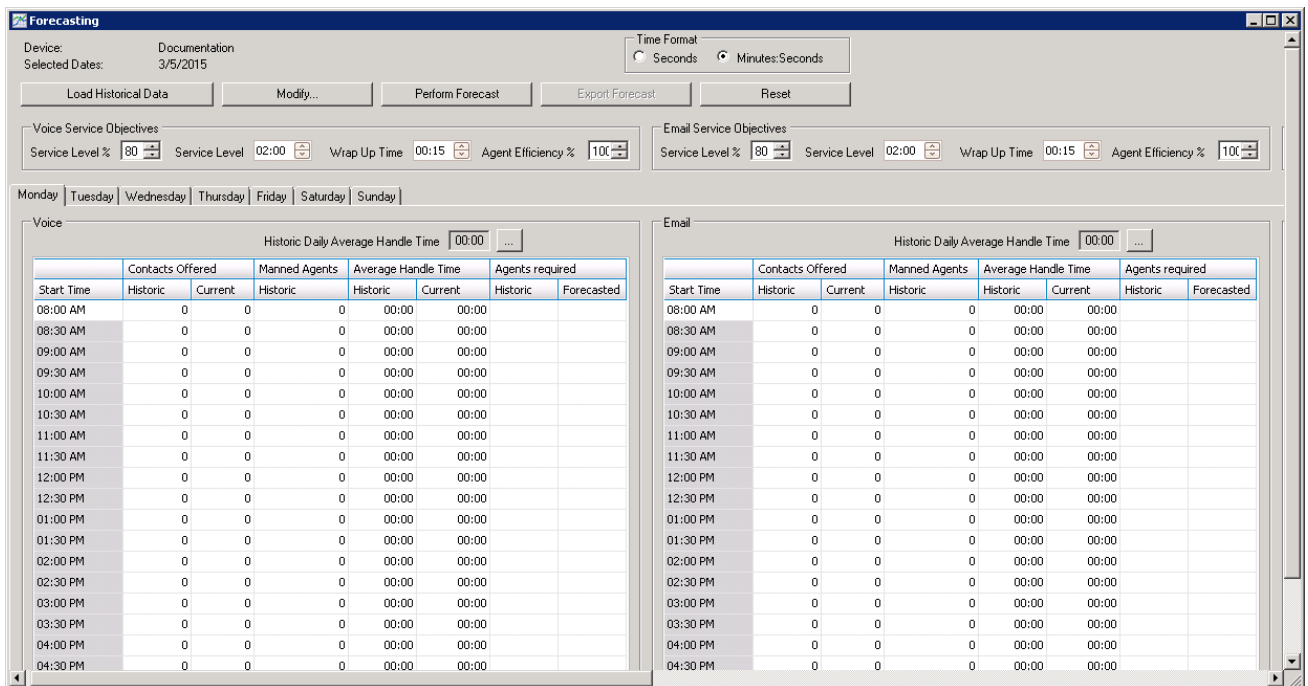
Figure 44: Forecasting window

To forecast resource requirements you

1. Load historical data.
   See "Loading historical data" on page 136.

2. Modify historical data if required.
   See "Modifying historical data" on page 137.

3. Perform a forecast.
   See "Performing forecasts" on page 142.

4. Export the forecast.
   See "Exporting forecasts" on page 143.

To access the Forecasting tool

1. Click **Tools** in the Contact Center Client ribbon.

2. In the **Data Mining** section, click **Forecasting**.

LOADING HISTORICAL DATA

When you load historical data, you include data from a queue or queue group over a historical period that best represents the contact center activity for the time period for which you are trying to forecast. You can select one or more specific dates and/or date ranges when loading historical data. You can select sequential or non-sequential dates (for example, Monday, Wednesday, and Friday) to use in the forecast. You can also exclude specific dates from within your date range.

NOTE:

- Users should identify and exclude any outliers or extreme values from the time period from which they are loading historical data, as these may give artificial values.
- Historical data for agents can be validated by comparing it to the queue and queue group by period reports for the same periods.
- Ring Groups are not supported with Forecasting, either as queues or as a member of a reporting queue groups.

The following procedure takes place in an open Forecasting tool window.

To load historical data

1. Click **Load historical data**.
   The Forecasting window opens.

2. Under **Queues** or **Queue groups**, click on the queue or queue groups you want to use as the source of historical data.
   NOTE: You can load historical data for a queue or queue group. If you are using the forecast to build a schedule, select historical data from the same queue group with which the schedule is associated. This data will best represent the agents required for your schedule.

3. If you want to include or exclude data from a specific date, under **Historical date(s) for the forecast**, select **Specific day** and then select a date.

4. If you want to include or exclude data from a date range, click **Date range** and specify a range of dates.

5. If you are including the data from the specified date(s), click **Include dates**.

6. If you are excluding the data from the specified date(s), click **Exclude dates**.

7. Repeat steps 3-6 until you have specified the date(s) or date range(s) from which you will derive your historical data.

8. After **Start hour** and **End hour**, select the time frame for historical data.

9. After **Interval**, select the schedule interval: 15, 30, or 60 minutes.
   The Interval value, in minutes, is the time increment by which the forecast will be displayed. It is recommended that you select an interval that matches the increments in which you schedule your employees. For example, if you schedule your employee shifts in 30 minute increments, select 30 minutes as the Interval value.

10. Click **Submit**.

MODIFYING HISTORICAL DATA

After loading your historical data, you can modify the values of Contacts Offered and Average Handle Time to generate different forecast results based on the modified values. You can also modify values after performing forecasts to obtain different forecasts of required agents. The historical values for data are always displayed, regardless of modifications, for comparison.

Modifying Average Handle Time

You can modify the Average Handle Time value for an interval, a day, or several days simultaneously. When you select a modification to apply to a value, either the Historic or Current value, it is applied as the new Current value. You cannot change the Daily Average Handle Time, but you can use it to modify the Average Handle Time of other intervals.

The following procedures outline how to

- Modify the Average Handle Time parameter on the forecast grid
- Modify an interval's Average Handle Time parameter
- Modify the Average Handle Time parameter using the Historic Daily Average Handle Time parameter

The following procedures take place in an active Forecasting tool window.

To modify the Average Handle Time parameter on the forecast grid

1. Click **Modify...=>Average Handle Time**.
   Alternatively, select an interval row, click the cell for Current Average Handle Time, and click the **...** button.
   See Figure 45.

2. Under **Specify the Average Handle Time value(s)**, specify how you want to modify Average Handle Time:

   - Increase or decrease Average Handle Time by a specific number of seconds
   - Increase or decrease Average Handle Time by a specific percentage
   - Set the Average Handle Time to a specific number of seconds

3. Under **Apply the changes to the following data source**, specify if you want to have the modification applied to the original value or the current grid value.

4. Under **Apply to days**, select the days for which you want to modify Average Handle Time.

5. Under **Apply to media type**, select the media types for which you want to modify **Average Handle Time**.

6. Click **Apply**.

To modify an interval's Average Handle Time parameter

1. Select an interval row, click the cell for **Current Average Handle Time**.

2. Set the Average Handle Time parameter for the interval.

To modify the Average Handle Time parameter using the Historic Daily Average Handle Time parameter

1. Click the **...** button after Historic Daily Average Handle Time.

2. Under **Specify the Average Handle Time value(s)**, specify how you want to modify the Historic Daily Average Handle Time:

   - Increase or decrease Average Handle Time by a specific number of seconds
   - Increase or decrease Average Handle Time by a specific percentage
   - Set the Average Handle Time to a specific number of seconds

3. Under **Apply to days**, select the interval(s) for which you want to apply the modified Historic Daily Average Handle Time.

4. Click **Apply**.

Figure 45: Average Handle Time window

Modifying Contacts Offered

You can modify the Contacts Offered value for one or several time intervals simultaneously. When you select to modify a value, either Historic or Current, it is applied as the new Current value.

This section explains how to:

- Modify the Contacts Offered parameter on the forecast grid
- Modify an interval's Contact Offered parameter

The following procedures take place in an active Forecasting tool window.

To modify the Contacts Offered parameter on the forecast grid

1. Click **Modify...=>Contacts Offered**.
   See Figure 46.

2. Under **Specify how you want to change the Contacts Offered value(s)**, specify how you want to modify Contacts Offered:

   - Increase or decrease Contacts Offered by a specific number of calls

   - Increase or decrease Contacts Offered by a specific percentage

   - Set the Contacts Offered to a specific number of call

3. Under **Apply the changes to the following data source**, specify if you want to modify the original value or the current grid value.

4. Under **Apply to times**, select the days and time interval for which you want to modify Contacts Offered.

5. Under **Apply to media** type, select the media types for which you want to modify Contacts Offered.

6. Click **Apply**.

To modify an interval's Contacts Offered parameter

1. Select an interval row, click the cell for **Current Contacts Offered**.

2. Set the Current Contacts parameter for the interval.

Figure 46: Contacts Offered window

Modifying the weekly total for Contacts Offered

You can modify the Contacts Offered values for an entire week simultaneously. Modifying these values changes the number of Contacts Offered while maintaining the same proportion of calls across all time intervals. For example, if you increase the weekly total by 10 percent, an interval with 10 calls will change to 11. However, an interval with zero calls will remain zero.

The following procedure takes place in an active Forecasting tool window.

To modify the Contacts Offered parameter on the forecast grid

1. Click **Modify...=>Weekly total**.
   See Figure 47.

2. Under **Specify how you want to change the weekly total**, specify how you want to modify Contacts Offered over the week:
   - Increase or decrease the weekly total of Contacts Offered by a specific number of contacts
   - Set the weekly total of Contacts Offered to a specific number of contacts

3. Under **Apply to totals**, specify if you want to modify the original values or the current grid values.

4. Click **Apply**.

Figure 47: Weekly total for Contacts Offered window

PERFORMING FORECASTS

When you perform a forecast, you receive the required agents based on both the historical and current values. If you adjust any of the values in your historical data, you must perform the forecast again.

NOTE: It is recommended that you save your forecast as an Excel file to preserve your settings to use or compare with the next forecast you make.

To run a forecast

1. Specify the Service Level %, Service Level Time, Wrap Up Time, and Agent Efficiency % you expect for the queue or queue group.

2. Click **Perform forecast**.
   You can perform what-if scenarios on the historical data using different Service objectives statistics until you are satisfied with the forecast.

EXPORTING FORECASTS

After performing a forecast, you can export it as a Microsoft Excel spreadsheet or export the forecast to Workforce Scheduling.

Saving forecasts as Excel files

After you generate forecast data you can export it to a Microsoft Excel .xlsx worksheet. If your forecast has different media types, each media type will have its own worksheet in the .xlsx file.

To export a forecast as an Excel file

1. Click **Export Forecast**.

2. Click **Microsoft Excel**.

3. Click **Export**.
   The forecast opens in a Microsoft Excel spreadsheet you can modify and save.

Exporting forecasts to Workforce Scheduling

If you are licensed for Workforce Scheduling, after you generate forecast data, you can export it into a Workforce Scheduling schedule.

When scheduling for agents who handle a particular media type, it is recommended that you export forecasts that use solely data from that media type. For example, if you are forecasting based on historical data from an email queue, the forecast should be exported into a Workforce Scheduling schedule that only handles email ACD interactions.

To export a forecast into a Workforce Scheduling schedule

1. Click **Export Forecast**.

2. Select **Workforce**.

3. For each media type, select the schedule for which to apply the forecast.
   NOTE: Each media type must be exported to a different schedule.

4. Click **Export**.

Chapter 7
INTERACTIVE CONTACT CENTER

Supervisors and Interactive Contact Center

Agents and Interactive Contact Center

Employee and agent control

Extension control

Queue control

INTERACTIVE CONTACT CENTER

Interactive Contact Center is a feature that enables supervisors to control the availability of agents, extensions, and queues, and enables agents to control their own availability.

Access to Interactive Contact Center abilities is determined by security role settings. Employees must be associated with the 'May control my real-time status in Interactive Contact Center' security role setting in order to change their state using applicable MiContact Center Business client applications.

SUPERVISORS AND INTERACTIVE CONTACT CENTER

Using Interactive Contact Center, supervisors can

- Control the availability of agents and ACD queues
- Log agents on and off of the system
- Have agents leave their agent groups and join other agent groups. Agent groups are assigned to queues so, in this way, agents can be moved from one queue to another as needed
- Have extensions leave their Ring Groups and join other Ring Groups
- Place agents in Make Busy
- Place agents in Do Not Disturb
- Place extensions into Do Not Disturb
- Place queues in Do Not Disturb
- Cancel Work Timer
- Cancel Reseize Timer

An employee's agent can be assigned to multiple agent groups, which can be associated to multiple queues. In order to move the agent from one queue to another queue, the supervisor has the agent leave one agent group and join another agent group.

AGENTS AND INTERACTIVE CONTACT CENTER

Using Interactive Contact Center, agents can

- Log themselves on and off of the system
- Remove themselves from agent groups and place themselves into other agent groups. Agent groups are assigned to queues so, in this way, agents can move themselves from one queue to another as needed
- Place themselves in Make Busy
- Place themselves in Do Not Disturb

Every time agents leave their desks they must set themselves into either Make Busy or Do Not Disturb and apply the applicable reason code. This enables supervisors to track agents' Do Not Disturb and Make Busy activity in reports.

EMPLOYEE AND AGENT CONTROL

Using Interactive Contact Center and Contact Center Client, you can control agents on the following monitors:

- Agent State by Position and Employee State by Position
- Agent State by Time and Employee State by Time
- Agent Shift

Agent control gives you control over individual agents. Monitor control gives you control over all of the agents on a monitor. All of the agents on the monitor are affected simultaneously by the action you take.

If you have Context Sensitivity enabled for monitors, the Agent Control and Monitor Control tabs display in the Contact Center Client ribbon when you have any of the above monitors open. You can perform actions using either a right-click and select method within the monitor or by selecting an agent or an empty cell (monitor control) and accessing the action menu in the Agent or Monitor Control tab views. (See Figure 48.)

Using Interactive Contact Center and Ignite (WEB), you can control agents and employees in the following monitors:

- Employee State
- Agent State

NOTE: Context sensitivity and monitor control are not supported with Ignite (WEB). You can only alter the state for one employee or agent at a time.
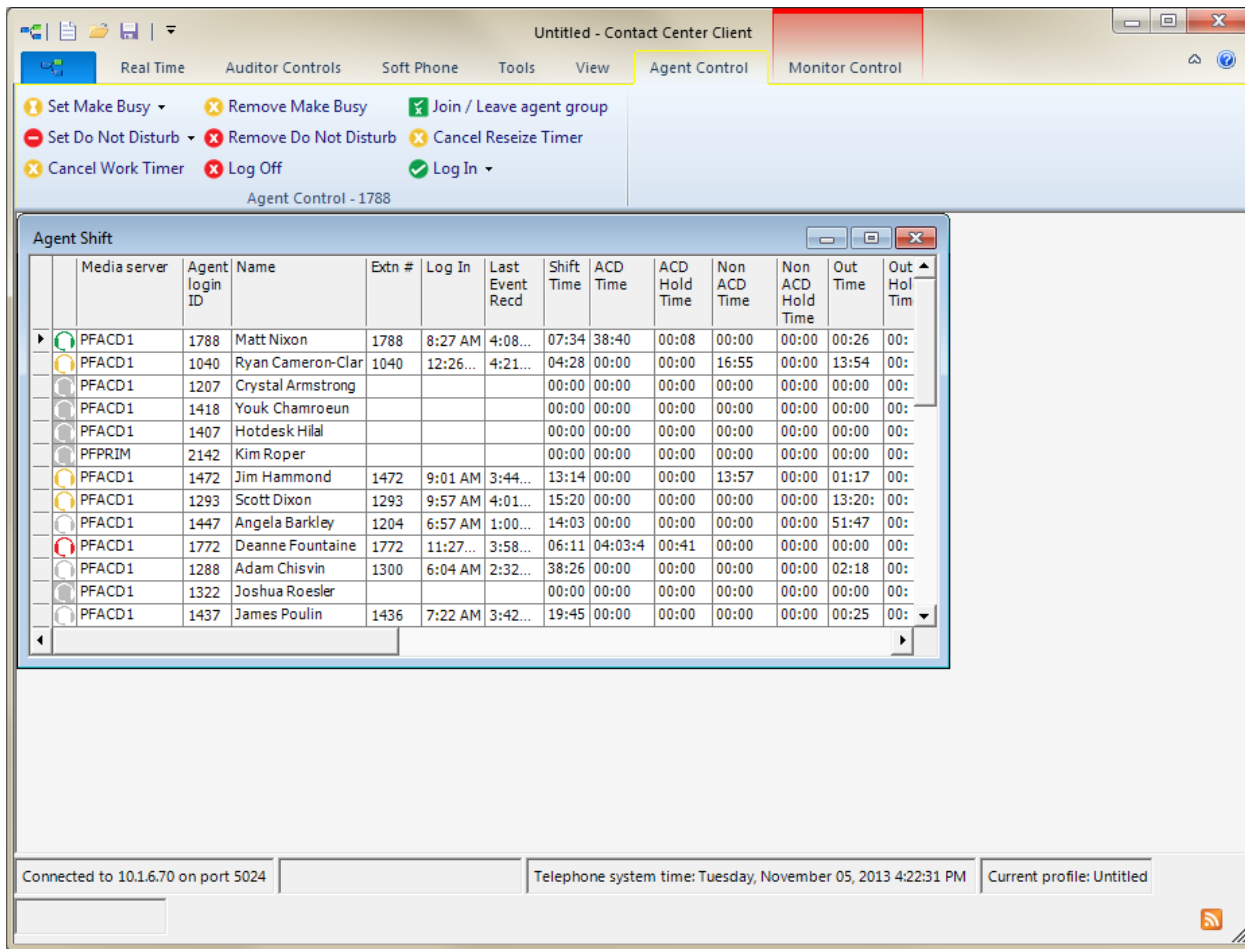
Figure 48: Agent Shift - Agent Control tab options

AGENTS AND AGENT GROUP PRESENCE

Agents can be assigned to multiple agent groups, which are associated with different queues. When agent groups are created, an employee's agents are assigned a default group presence, either Present or Absent. To handle interactions the employee can make themselves present in their agent groups using either Contact Center Client or Ignite.

It is important to note that agents may join or leave agent groups but not queues. Agents become absent from a queue indirectly if they leave all agent groups associated with that queue. An agent who is present in an agent group which is associated to all queues would be disassociated from all queues simultaneously if they became absent in their agent group

HIDING THE MONITOR CONTROL OPTION

Interactive Contact Center enables you to manage the presence of all devices in a monitor using Monitor Device Control. If you do not want to use monitor control, you can hide this option so it is not accessible.

To hide the Monitor control option

1. In Contact Center Client, click **File=>Options**.
2. Under **Device control**, clear the **Display monitor device control option** check box.
3. Click **OK**.

LOGGING ON AN AGENT - CONTACT CENTER CLIENT

NOTE:

- An ACD Hot Desking Agent must enter an extension number each time the agents logs on to the ACD routing system using Interactive Contact Center. The agent cannot rely on the extension number last used when logging on. This is because the ACD data stream unifies the agent ID and the extension. After a Hot Desking Agent logs on or off of the ACD routing system using Interactive Contact Center, sometimes the Interactive Contact Center agent controls are not available to the agent for two to five minutes.
- You will be unable to log on an agent to the system if there are no available user licenses.
- If your contact center participates in the use of PINs, supervisors with the correct Class of Service do not require an agent's PIN to interactively log in a Hot Desking Agent.
- Depending on security roles and telephone switch settings, employees who are licensed as Advanced Supervisor or System Administrator may not be prompted to enter a PIN when logging into Interactive Contact Center, Softphone, or PhoneSet Manager.
- If a Hot Desking Agent logs into an extension that serves as the overflow point for a Ring Group, calls to that Ring Group will not be offered to the extension and will remain queued or ringing until abandoned or answered.
- Hot desking users logging into a Ring Group extension must also be a member of the Ring Group to ensure accurate reporting.

You log employee voice agents in and out in either an open Employee or Agent Monitor in Contact Center Client. Multimedia agents are not logged in with voice agents.

To log in an agent in an open Employee monitor

- Right-click the cell of an employee and click **Employee control=>Log in=>**voice agent. Alternatively, select the employee cell in an open monitor, click **Log in** from the **Employee Control** tab on the Contact Center Client ribbon, and select the voice agent.
  NOTE: When you log in an employee's voice agent, you must enter the extension for the agent. See the procedure below.

To log in an agent by extension in an open Employee monitor

1. Right-click the cell of an employee and click **Employee control=>Log in=>By extension**.
2. If the employee has multiple voice agents, select the agent to log in from the drop-down list.
3. Type the **Agent's extension**.
4. Click **OK**.

To log in an agent in an open Agent monitor

- Right-click the cell of a voice agent who is not logged into and click **Agent Control=>Log in=>**voice agent. Alternatively, select the agent cell in an open monitor and click **Log in** from the Contact Center Client ribbon.
  NOTE: When you log in a voice agent, you must enter the extension for the agent. See the procedure below.

To log in an agent by extension in an open Agent monitor

1. Right-click the cell of a voice agent and click **Agent control=>Log in=>By extension**.
2. If the employee has multiple voice agents, select the agent to log in from the drop-down list.
3. Type the **Agent's extension**.
4. Click **OK**.

LOGGING OFF AN AGENT - CONTACT CENTER CLIENT

You can log off an employee from all media in an Employee monitor or Agent monitor. Logging off an agent logs off all of the employee's voice agents and sets the employee's multimedia agents to Absent in all their agent groups. If the employee is logged into their soft phone in Contact Center Client, they will also be logged out of the soft phone.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To log off all of an employee's agents in an open Employee monitor

- Right-click the cell of an employee and click **Employee control=>Log off**. Alternatively, select the employee cell in an open monitor and click **Log Off** from the **Employee Control** tab on the Contact Center Client ribbon.

To log off an agent in an open Agent monitor

NOTE: Logging off an employee's agent logs off all of the employee's agents simultaneously.

- Right-click the cell of an agent and click **Agent control=>Log off**. Alternatively, select the agent cell in an open monitor and click **Log Off** from the **Agent Control** tab on the Contact Center Client ribbon.

To log off all employees' agents in an open Employee monitor

1. Right-click the monitor and click **Monitor control=>Log off**.
   Alternatively, click the **Monitor Control** tab in the Contact Center Client ribbon and select **Log Off**.
2. Click **Yes**.

To log off all agents in an open Agent monitor

1. Right-click the monitor and click **Monitor control=>Log off**.
   Alternatively, click the **Monitor Control** tab in the Contact Center Client ribbon and select **Log Off**.
2. Click **Yes**

LOGGING ON AN AGENT - IGNITE (WEB)

When you log on an agent in Ignite (WEB), you make them available to receive voice interactions.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To log on a voice agent

1. In the monitor, select the agent you want to log on.
2. Click **State=>Available**.
3. Enter the agent's extension and PIN (if enabled) and click **Login**.
   NOTE: This step is not required if the agent is set to automatically log in when the 'Available' state is selected.

LOGGING OFF AN AGENT - IGNITE (WEB)

When you log off an agent in Ignite (WEB), you make them unavailable to receive all media interactions, including voice, email, chat, SMS, and open media.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To log off an agent

1. In the monitor, select the agent you want to log off.
2. Click **State=>Offline**.

JOINING AND LEAVING AGENT GROUPS - CONTACT CENTER CLIENT

After logging into Contact Center Client, agents can use Interactive Contact Center to control their presence status in agent groups. Optionally, supervisors can use Interactive Contact Center to control the presence status of agents in specific agent groups.

NOTE:

- An agent's ACD hot desk line remains in service while they are logged in as an ACD hot desk user even if they are not present in any ACD groups and not receiving ACD calls.

To join an agent to or have an agent leave an agent group in an open Employee monitor

1. Right-click the cell of an employee and click **Employee control=>Join/Leave Agent Group=>[Agent]**.
   Alternatively, select the cell of an employee and in the **Employee Control** tab of the Contact Center Client ribbon, click **Join/Leave agent group=>[Agent]**.
2. Select the agent group(s) to which you want the employee's agent(s) to join or deselect the agent group(s) to have the employee's agent(s) leave the agent groups.
3. Click **OK**.

To join an agent to or have an agent leave an agent group in an open Agent monitor

1. Right-click the cell of an agent who is logged on and click **Agent control=>Join/Leave Agent Group**.
   Alternatively, select the cell of an agent and click **Join/Leave Agent Group** from the Agent Control tab in the Contact Center Client ribbon.

2. Select the agent group(s) to which you want the agent(s) to join or deselect the agent group(s) to which you want the agent(s) to leave.

3. Click **OK**.

JOINING AND LEAVING AGENT GROUPS - IGNITE (WEB)

After signing into Ignite (WEB) and logging into their phone, agents can use interactive Contact Center to control their presence in agent groups. Optionally, supervisors can use Interactive Contact Center to control the presence status of agents in specific agent groups from within the Agent and Employee State monitors in Ignite (WEB).

The following procedures take place in either an Agent State or Employee State monitor in Ignite (WEB).

To join an agent to an agent group

1. In the monitor, select the agent for which you want to modify agent group presence.

2. Click **Agent Groups**.

3. Hover over the agent group's avatar and select **Join All**.

4. Click **Update**.

To remove an agent from an agent group

1. In the monitor, select the agent for which you want to modify agent group presence.

2. Click **Agent Groups**.

3. Hover over the agent group's avatar and select **Leave All**.

4. Click **Update**.

To join an agent to or remove an agent from all agent groups

1. In the monitor, select the agent for which you want to modify agent group presence.

2. Click **Agent Groups**.

3. To join an agent to all agent groups, click **Join All=>Update**.

4. To remove an agent from all agent groups, click **Leave All=>Update**.

To make an agent available or unavailable to answer interactions of a specific media type

1. In the monitor, select the agent for which you want to modify agent group presence.

2. Click **Agent Groups**.

3. To become available to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in blue.

4. To become unavailable to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in grey.

5. Click **Update**.

PLACING EMPLOYEES IN MAKE BUSY - CONTACT CENTER CLIENT

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing employees into Make Busy places both employees and all of their agents into Make Busy.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To place an employee in an open Employee monitor in Make Busy

- Right-click the cell of an employee and click **Employee control=>Set Make Busy=>**reason code. Alternatively, select an empty cell in an open monitor and click **Set Employee Make Busy=>**reason code from the **Employee Control** tab in the Contact Center Client ribbon.

To place all employees in an open Employee monitor in Make Busy

1. Right-click the monitor and click **Monitor control=>Set Make Busy=>**reason code. Alternatively, select an empty cell in an open monitor and click **Set Make Busy=>**reason code from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

To place an employee in an open Agent monitor in Make Busy

- Right-click the cell of an agent and click **Agent control=>Set Employee Make Busy=>**reason code. Alternatively, select the agent cell in an open monitor and click **Set Employee Make Busy=>**reason code from the Agent Control tab in the Contact Center Client ribbon.

To place all employees in an open Agent monitor in Make Busy

1. Right-click the monitor and click **Monitor control=>Set Employee Make Busy=>**reason code. Alternatively, select an empty cell in an open monitor and click **Set Make Busy=>**reason code from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

REMOVING EMPLOYEES FROM MAKE BUSY - CONTACT CENTER CLIENT

Removing employees from Make Busy removes both employees and all of their agents from Make Busy.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To remove an employee in an open Employee monitor from Make Busy

- Right-click the cell of an employee whose agents are in Make Busy and click **Employee control=>Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Employee Control** tab in the Contact Center Client ribbon.

To remove all employees in an open Employee monitor from Make Busy

1. Right-click the cell of an employee who is in Make Busy and click **Monitor control=>Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

To remove an employee in an open Agent monitor from Make Busy

- Right-click the cell of an agent in Make Busy and click **Agent control=>Remove Make Busy**. Alternatively, select the agent cell in an open monitor and click **Remove Make Busy** from the **Agent Control** tab in the Contact Center Client ribbon.

To remove all employees in an open Agent Monitor from Make Busy

1. Right-click the cell of an employee and click **Monitor control=>Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

PLACING EMPLOYEES IN BUSY - IGNITE (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing an employee into Busy places them in Busy across all media types for which they answer interactions. While in Busy, they can receive transferred multimedia interactions, however, inbound multimedia interactions will not be routed to them. They can also receive Non ACD voice interactions and pick interactions waiting in queue.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To place an employee in Busy

1. In the monitor, select the employee you want to place in Busy.

2. Click **State=>Busy…**.

3. Choose a Busy code.

REMOVING EMPLOYEES FROM BUSY - IGNITE (WEB)

Removing employees from Busy re-enables them to answer inbound multimedia interactions and ACD calls.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Busy

1. In the monitor, select the employee you want to remove from Busy.

2. Under **State**, select an alternate state, or, click **X** button next to **Busy...** to remove the busy code.
    NOTE: Select **Available** if you want to make them available to receive interactions.

PLACING EMPLOYEES IN DO NOT DISTURB - CONTACT CENTER CLIENT

NOTE:

- If an agent on an ACD calls puts themselves into MKB or DND, Work Timer events are not received for that call.

- Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing employees into Do Not Disturb places employees and all of their agents into Do Not Disturb.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To place an employee in an open Employee monitor in Do Not Disturb

- Right-click the cell of an employee and click **Employee Control=>Set Do Not Disturb=>**reason code. Alternatively, select the employee cell in an open monitor and click **Set Employee Do Not Disturb=>**reason code.

To place all employees in an open Employee Monitor in Do Not Disturb

1. Right-click the monitor and click **Monitor control=>Set Do Not Disturb=>**reason code. Alternatively, select an empty cell in an open monitor and click **Set Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

2. Click **Yes**.

To place an employee in an open Agent monitor in Do Not Disturb

- Right-click the cell of an agent who is logged on and click **Agent control=>Set Employee Do Not Disturb=>**reason code. Alternatively, select the agent cell in an open monitor and click **Set Do Not Disturb=>**reason code from the Agent Control tab in the Contact Center Client ribbon.

To place all employees in an open Agent monitor in Do Not Disturb

1. Right-click the monitor and click **Monitor control=>Set Do Not Disturb=>**reason code. Alternatively, select an empty cell in an open monitor and click **Set Do Not Disturb** from the Monitor Control tab in the Contact Center Client ribbon.

2. Click **Yes**.

REMOVING EMPLOYEES FROM DO NOT DISTURB - CONTACT CENTER CLIENT

Removing employees from Do Not Disturb removes employees and all of their agents from Do Not Disturb.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To remove an employee in an open Employee monitor from Do Not Disturb

- Right-click the cell of an employee who is in Do Not Disturb and click **Employee control=>Remove Do Not Disturb**. Alternatively, select the employee cell in and click **Remove Do Not Disturb** from the **Employee Control** tab in the Contact Center Client ribbon.

To remove all of a monitor's employees in an open Employee monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control=>Remove Do Not Disturb**. Alternatively, select an empty cell in an open monitor and click **Remove Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

To remove an employee in an open Agent monitor from Do Not Disturb

- Right-click the cell of an agent who is in Do Not Disturb and click **Agent control=>Remove Do Not Disturb**. Alternatively, select the agent cell in an open monitor and click **Remove Do Not Disturb** from the **Agent Control** tab in the Contact Center Client ribbon.

To remove all of a monitor's employees in an open Agent monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control=>Remove Do Not Disturb**. Alternatively, select an empty cell in an open monitor and click **Remove Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

PLACING EMPLOYEES IN DO NOT DISTURB - IGNITE (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing an employee into Do Not Disturb places them in Do Not Disturb across all media types for which they answer interactions. While in Do Not Disturb, they are unable to receive inbound multimedia interactions and internal voice interactions, including transfers.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To place an employee in Do Not Disturb

1. In the monitor, select the employee you want to place in Do Not Disturb.
2. Under **State**, click **Do Not Disturb…**.
3. Choose a DND code.

REMOVING EMPLOYEES FROM DO NOT DISTURB - IGNITE (WEB)

Removing employees from Do Not Disturb re-enables them to receive interactions for all applicable media types.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Do Not Disturb

1. In the monitor, select the employee you want to remove from Do Not Disturb.
2. Under **State**, select an alternate state, or, click **X** button next to **Do Not Disturb...** to remove the DND Reason code.
   NOTE: Select **Available** if you want to make them available to receive interactions.

CANCELING WORK TIMER FOR EMPLOYEES - CONTACT CENTER CLIENT

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

In an Employee monitor or Agent monitor, you can cancel Work Timer for one or more employees. The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To cancel Work Timer in an open Employee monitor

- Right-click the cell of an employee who is in Work Timer and click **Employee control=>Cancel Work Timer**. Alternatively, select the employee cell in an open monitor and click **Cancel Work Timer** in the appropriate media section of the **Employee Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for all employees in an open Employee monitor

- Right-click the monitor and click **Monitor control=>Cancel Work Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Work Timer** in the media type's section of the **Monitor Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for an employee in an open Agent monitor

- Right-click the cell of an agent who is in Work Timer and click **Agent control=>Cancel Work Timer**. Alternatively, select the agent cell in an open monitor and click **Cancel Work Timer** from the **Agent Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for all employees in an open Agent monitor

- Right-click the monitor and click **Monitor control=>Cancel Work Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Work Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

CANCELING WORK TIMER FOR EMPLOYEES - IGNITE (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Work Timer

1. In the monitor, select the employee you want to remove from Work Timer.
2. Click **State** and select an alternate state.
   NOTE: Select **Available** if you want to make them available to receive interactions.

CANCELING THE RESEIZE TIMER FOR EXTERNAL HOT DESK AGENTS

If an external hot desk user is unavailable and the ACD path attempts to deliver a call to them the ACD routing system will initiate the Reseize Timer, preventing further ACD call delivery attempts until the timer expires or is canceled by the agent or supervisor. Value settings for reseize timers are a minimum of four seconds, a default of 180 seconds, and a maximum of 60 minutes. These values are configured on the ACD routing system. When an agent is in the Reseize Timer state, the applicable real-time monitors in Contact Center Client display the Make Busy icon as well as text denoting the agent's current state as 'Reseize Timer'.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To cancel Reseize Timer for an employee's voice agent in an open Employee monitor

- Right-click the cell of an employee who is in Reseize Timer and click **Employee control=>Cancel Reseize Timer**. Alternatively, select the employee cell in an open monitor and click **Cancel Reseize Timer** in the appropriate media section of the **Employee Control** tab in the Contact Center Client ribbon.

To cancel Reseize Timer for all employee voice agents in a monitor in an open Employee monitor

- Right-click the monitor and click **Monitor control=>Cancel Reseize Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Reseize Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

To cancel Reseize Timer for an employee's voice agent in an open Agent monitor

- Right-click an agent who is in Reseize Timer and click **Agent control=>Cancel Reseize Timer**. Alternatively, select the agent cell in an open monitor and click **Cancel Reseize Timer** in the appropriate media section of the **Agent Control** tab in the Contact Center Client ribbon.

To cancel all of the voice agents on a monitor in the Reseize Timer state in an open Agent monitor

- Right-click the monitor and click **Monitor control=>Cancel Reseize Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Reseize Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

EXTENSION CONTROL

Using Interactive Contact Center and Contact Center Client, you can control extensions on the following monitors:

- Extension State by Position
- Extension Now

Extension Control gives you control over individual extensions. Monitor Control gives you control over all the extensions on a monitor. All of the extensions on the monitor are affected by the action you take. You can perform actions using either a right-click and select method within the monitor or by selecting an extension or an empty cell (monitor control) and accessing the action menu in the Extension or Monitor Control tabs in the ribbon. (See Figure 49.)
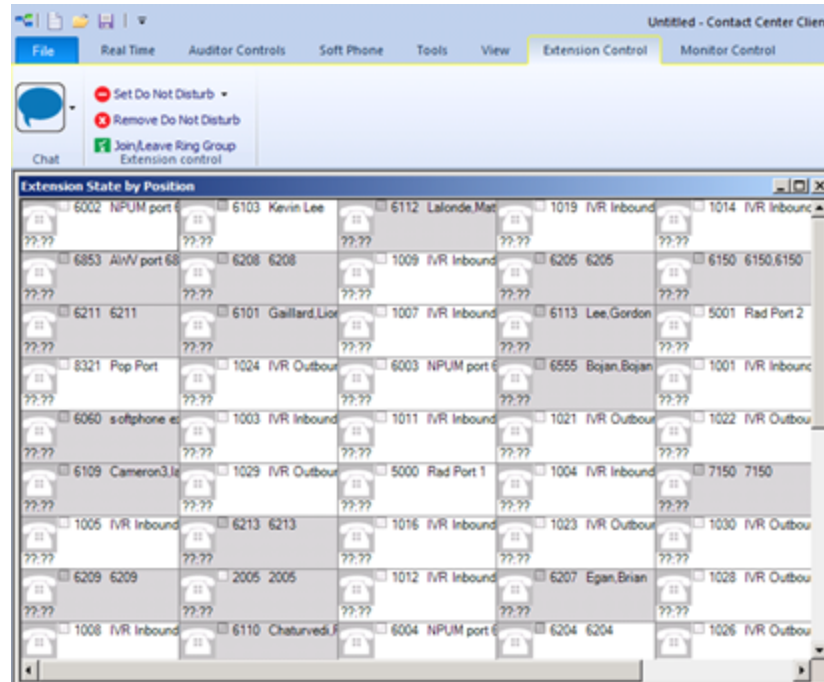
Figure 49: Extension State by Position – Extension Control tab

RING GROUP PRESENCE

If you are licensed for Ring Groups, extensions can join and leave Ring Groups via Interactive Contact Center.

Extensions can be assigned to multiple Ring Groups. Within a Ring Group, an extension can be set to Present, enabling it to receive calls, or Absent, ensuring that calls are not offered to the extension. By default, extensions are set to Present. Supervisors can manually change the extension presence in Contact Center Client.

JOINING AND LEAVING RING GROUPS

Interactive Contact Center can be used to control the presence of extensions in Ring Groups.

The following procedures take place in an open Extension monitor in Contact Center Client.

To join an extension to or remove an extension from a Ring Group

1. Right-click the cell of an extension and click **Extension control=>Join/Leave**.
   Alternatively, select the cell of an extension and in the **Extension Control** tab of the **Contact Center Client** ribbon, click **Join/Leave**.
2. Select the Ring Group(s) to which you want the extension to join or deselect the Ring Group(s) to have the extension leave the Ring Group(s).
3. Click **OK**.

PLACING AN EXTENSION IN DO NOT DISTURB

The following procedures take place in an open Extension monitor in Contact Center Client.

To place an extension in Do Not Disturb

- Right-click the cell of an extension and click **Extension control=>Set Do Not Disturb=>reason code**. Alternatively, select the Extension Control tab and select Set Do Not Disturb=>reason code.

To place all extensions into Do Not Disturb in an open monitor

1. Right-click the cell of an extension and click **Monitor control=>Set Do Not Disturb=>reason code**.
   Alternatively, select the **Monitor Control** tab and select **Set Do Not Disturb=>reason code**.
2. Click **Yes**.

REMOVING AN EXTENSION FROM DO NOT DISTURB

The following procedures take place in an open Extension monitor in Contact Center Client.

To remove an extension from Do Not Disturb

- Right-click the cell of an extension in Do Not Disturb and click **Extension control=>Remove Do Not Disturb**.
  Alternatively, select the **Extension Control** tab and select **Remove Do Not Disturb**.

To remove all extension from Do Not Disturb in an open monitor

- Right-click the cell of an extension and click **Monitor control=>Remove Do Not Disturb**. Alternatively, select the **Extension Control** tab and select **Remove Do Not Disturb**.

QUEUE CONTROL

You can manually place queues in or out of Do Not Disturb using the Queue Now monitor in Contact Center Client.

Queues can be automatically set to open and close or go in and out of Do Not Disturb using queue schedules and queue control plans. These are administrative settings. For more information see the *MiContact Center Business Installation and Administration Guide*

MANUALLY CONTROLLING QUEUES

Queue control enables you to control individual queues. Monitor control enables you to control all of the queues on a monitor.

The Monitor Options tab displays in the ribbon for the Queue Now monitor. You can perform actions using either a right-click and select method in the open monitor or by accessing the action menu in the Monitor Options ribbon. (See Figure 50.)

NOTE: Manual queue control overrides administrative settings for queue schedules and queue control plans.
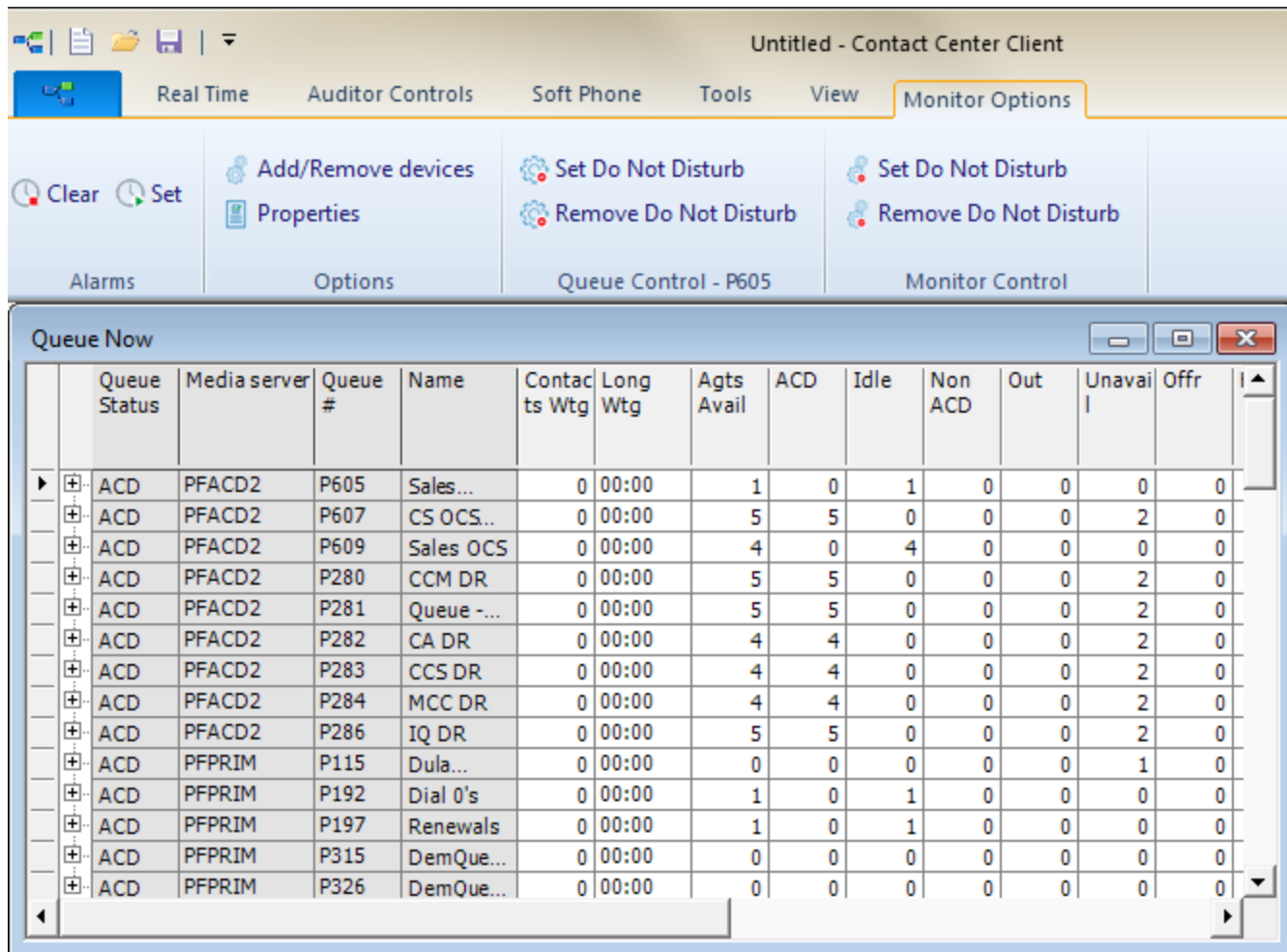
Figure 50: Queue Now monitor - Monitor Options tab

Placing queues in Do Not Disturb

Using manual queue control, you can place queues in and remove queues from Do Not Disturb on the Queue Now monitor. A contact will not enter a queue that is in Do Not Disturb. Instead the contact is sent to an unavailable answer point if one is configured for the queue.

NOTE: Putting a Ring Group into Do Not Disturb removes the presence of all of its members.

To place a queue in Do Not Disturb

- Right-click the cell of an active queue and click **Queue control=>Set Do Not Disturb**. Alternatively, select the queue in an open Queue Now monitor and click **Set Do Not Disturb** from the Monitor Option tab in the Contact Center Client ribbon. See Figure 51.
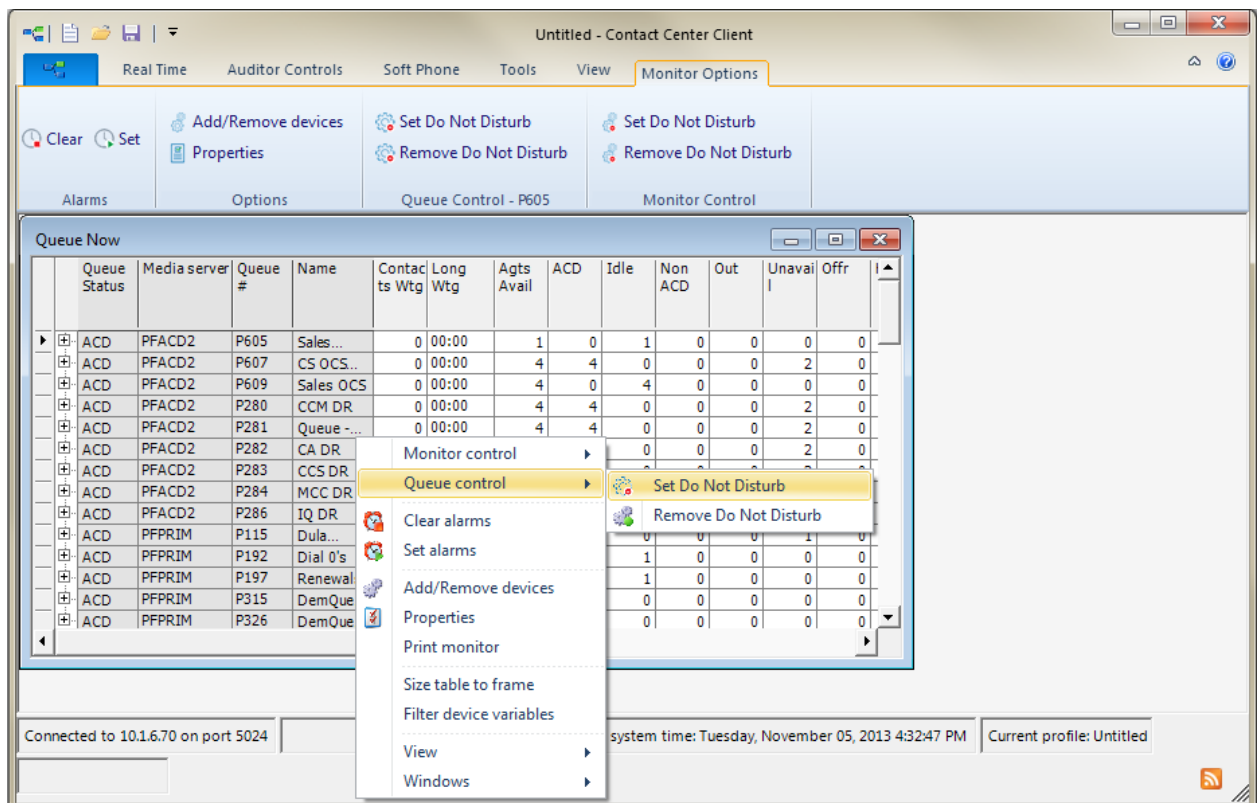
Figure 51: Placing a queue in Do Not Disturb

To place all of the queues on a monitor in Do Not Disturb

- Right-click the monitor and click **Monitor control=>Set Do Not Disturb**. Alternatively, select an open Queue Now monitor and click **Set Do Not Disturb** from the Monitor Option tab in the Contact Center Client ribbon.

Removing queues from Do Not Disturb

To remove a queue from Do Not Disturb

- Right-click the cell of a queue that is in Do Not Disturb and click **Queue control=>Remove Do Not Disturb**. Alternatively, select the queue in an open Queue Now monitor and click **Remove Do Not Disturb** from the Monitor Option tab in the Contact Center Client ribbon.

To remove all of the queues on a monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control=>Remove Do Not Disturb**. Alternatively, select an open Queue Now monitor and click **Remove Do Not Disturb** from the Monitor Option tab in the Contact Center Client ribbon.

Chapter 8
INTERACTIVE VISUAL QUEUE

INTERACTIVE VISUAL QUEUE

Interactive Visual Queue is a Contact Center Client real-time monitor that enables supervisors to both monitor and control the content in contact center queues. With Interactive Visual Queue monitors open, supervisors can monitor the contents of queues and queue groups, easily move interactions between queues, assign interactions to agents, and proactively remove unwanted interactions from the queues.

Interactive Visual Queue includes a Queued media grid and an Abandoned media grid. In the Queued media grid, supervisors and agents can view calls within queues and then use a drag-and-drop operation to move calls from busy queues to less active queues. In the Abandoned media grid, supervisors can view abandoned call information, including the caller name, phone number, and time of the abandoned call. Agents can use the Abandoned media grid to call back abandoned callers.

Ring Groups are not supported with Interactive Visual Queue and any queue groups displayed in Interactive Visual Queue will not display calls in the Ring Group queues.

The following sections explain how to use Interactive Visual Queue to monitor call activity, redirect calls, manage abandoned calls, configure alarms, and view callback information. For information on using Interactive Visual Queue to manage multimedia interactions, see the *Multimedia Contact Center Installation and Deployment Guide*.

ACCESSING INTERACTIVE VISUAL QUEUE

You access Interactive Visual Queue by logging on to Contact Center Client and then opening the Real-time toolbar.

To open an Interactive Visual Queue monitor

1. Log on to Contact Center Client.

2. In the Contact Center Client ribbon, click **Real time**.

3. Click **Interactive Visual Queue**.
   The Add/Remove device IDs window opens.

4. Select a queue from the Queues list and click **OK**.
   See Figure 52.

   NOTE: Virtual queue groups are shown in the Queue groups list.
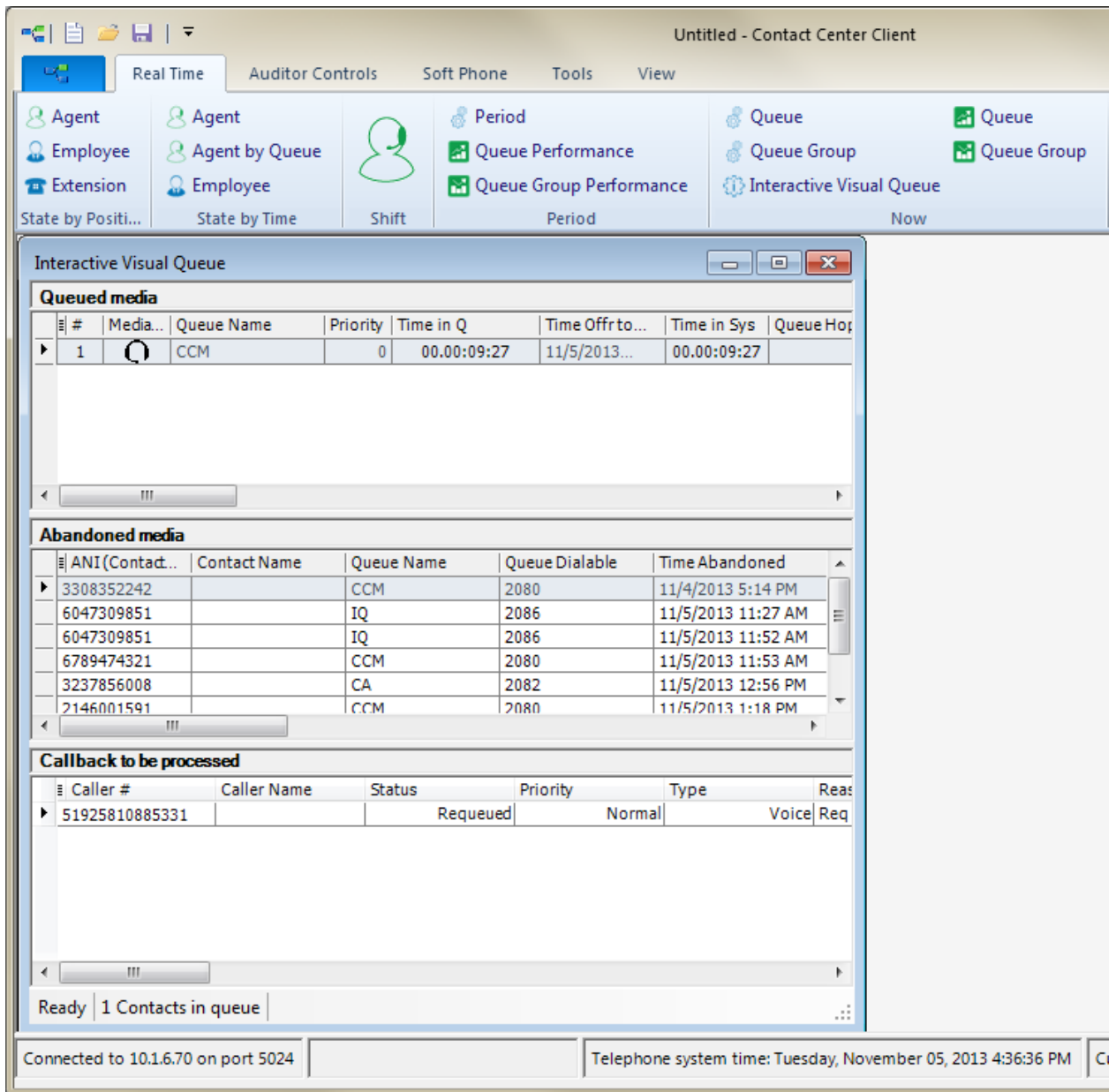
Figure 52: Interactive Visual Queue monitor

INTERACTIVE VISUAL QUEUE MONITOR GRIDS

The Interactive Visual Queue monitor includes the Queued media grid and the Abandoned media grid. The Queued media grid lists the calls that are currently in the selected queues or queue groups. The Abandoned media grid lists abandoned calls. The calls are listed in order of priority and the columns can be sorted. You can configure the column headings and specify which columns are displayed. Depending on licensing, Interactive Visual Queue includes the Callback to be processed grid, which lists callbacks.

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NOTE: The abandoned calls column in the Interactive Visual Queue monitor displays all abandoned calls except those abandoned while ringing an agent or extension. The abandoned column in the Queue Now monitor does not peg short abandons as abandoned calls, but does peg calls that are abandoned while ringing an agent or extension if they do not peg as a short abandon. Because of these differences, you may notice discrepancies between the abandoned call information in these two monitors.

The following list provides descriptions of the column headings available in the Queued media grid:

- *Position (#)* displays the answer position relative to other interactions in the queue
- *Media icon* displays the media type
- *Queue Name* is the name of the queue
- *Queue Dialable* displays:
    - Voice—the dialable number of the queue
    - Chat—Queue Auto Response User Name
    - Email—Email address of the queue
    - SMS--the dialable number of the queue
- *Priority* is the priority of the interaction in the queue (the lower the number, the higher the priority)
- *Time in Queue* is the interaction's total time in the current queue
- *Time Offered to System* is the time the interaction first entered the system
- *Time in System* is the interaction's total time in the system
- *Queue Hops* is the number of times an interaction has changed queues
- *ANI (Contact ID)* displays:
    - Voice—caller # / ANI
    - Chat—Chat email address from pre-chat form
    - Email—From email address
    - SMS—caller # / ANI
- *Subject* displays
    - Voice—blank
    - Chat—Chat subject from pre-chat form
    - Email—Email subject
    - SMS—blank
- *Is Callback* indicates if the queued media is a callback request (voice only)
- *Service level countdown* provides a countdown in seconds when the contact will exceed the target time to meet the service level
- *Contact Name* is the name associated with the contact (if available)
    - Voice—caller ID
    - Chat—Chat name from pre-chat form
    - Email—Email "From" name, if available
    - SMS—caller #
- *Time Offered to Queue* is the time the contact entered the current queue

- *DNIS (To Address)* displays
    - Voice—DNIS Number
    - Chat—blank
    - Email—receiver's email address
    - SMS—blank
- *To Name* displays
    - Voice—DNIS Name, if configured in YourSite Explorer for the associated DNIS number
    - Chat—blank
    - Email—Email "To" name, if available
    - SMS—blank
- *Collected Information* displays the single or series of collected results provided by IVR Routing. Collected information requires IVR Routing and, optionally, Remote Database Verification or CTI Developer Toolkit
- *Queue Reporting* is the queue's reporting number

The following list provides descriptions of the column headings available in the Abandoned media grid:

- *ANI (Contact ID)* displays caller # / ANI
- *Contact Name* is the caller ID associated with the contact (if available)
- *Queue Name* is the name of the queue
- *Queue Dialable* displays the dialable number of the queue
- *Time Abandoned* is the time at which the contact abandoned the queue
- *Time Since Abandoned* is the elapsed time since the contact abandoned the queue
- *Last Callback Employee* is the employee name and employee ID associated with the most recent callback attempt
- *Last Callback Time* is the time at which the most recent callback was attempted
- *Time Since Last Callback* is the elapsed time since the most recent callback attempt
- *Time Offered to Queue* is the time the contact entered the current queue
- *Time in Queue* is the contact's total time in the current queue
- *Time Offered to System* is the time the contact first entered the system
- *Time in System* is the contact's total time in the system
- *Queue Hops* is the number of times a contact has changed queues
- *Is Callback* indicates if the queued media is a callback request (voice only)
- *Service level countdown* provides a countdown in seconds when the interaction will exceed the target time to meet the service level
- *DNIS (To Address)* displays the DNIS number
- *To Name* displays the DNIS name, if configured in YourSite Explorer for the associated DNIS number
- *Subject* displays DNIS

- *Collected Information* displays the single or series of collected results provided by IVR Routing. Collected information requires IVR Routing, Verified Collected Digits and, optionally, Remote Database Verification or CTI Developer Toolkit
- *Queue Reporting* is the queue's reporting number
- *Media icon* displays the media type

The following list provides descriptions of the column headings available in the Callback to be processed grid:

- *Caller #* displays the phone number provided by the contact
- *Caller Name* displays the contact's name
- *Status* displays the state of the callback
    - New request
    - In progress
    - Requeued
    - Completed
    - Unknown
- *Priority* the importance level of the callback
    - Voice—Normal
    - Web—Normal
    - Abandoned—Low
- *Type* displays the type of callback
    - Voice
    - Web
    - Abandoned
- *Reason* displays the callback's reason for its current status
- *Attempted Calls to Agent* displays the number of times the agent attempted the callback
- *Last Time Agent Attempted* displays the last time the agent attempted the callback
- *Request Time* the specific time at which the callback is scheduled to be processed; this field is populated when the callback is requeued
- *Time Received* displays the specific time the caller submitted the callback request
- *Web IP Address* displays the IP address of the contact who submitted the callback request
- *Last Attempted Call To Client* displays the specific time the last callback attempt to the caller was made
- *Attempted Calls To Client* displays the number of times the callback was attempted
- *Client Available From* displays the earliest time the contact is available to receive the callback
- *Client Available To* displays the latest time the caller is available to receive the callback
- *ANI* displays the phone number of the caller
- *DNIS* displays the phone number the caller dialed
- *Dialable* displays the number of the device that will handle the callback
- *Device Name* displays the name of the device that will handle the callback
- *Device Type* displays the type of device that will handle the callback – extension, agent, or queue

- *Recorded Message* displays a hyperlink to the voice callback request .wav file left by the caller
- *Area* displays the state, province, or other area the call originated from
- *Country* displays the country the call originated from
- *Endpoint* displays the endpoint attempting to perform the callback
- *Region* displays the region the call originated from

SORTING CONTACTS BY COLUMNS

Monitor columns can be used to sort contacts in Interactive Visual Queue. You can only sort by one column in a grid at a time. By default, the Queued media grid is sorted by Position number. Sort preferences are preserved in your Contact Center Client profile.

To sort contacts by columns in the Interactive Visual Queue monitor

- Click on the column heading by which you want to sort.
  To reverse the sort order, click on the column again.

REDIRECTING CALLS

A call can move between queues automatically (interflow) or manually (redirection).

Interflow

You can configure queue settings on the telephone system to automatically move a call from one queue to another after a specific duration. For example, you can configure your system to move a call from Queue 1 to Queue 2 if the call has not been answered within 30 seconds. Interflow occurs without any user interaction.

Redirection

Using Interactive Visual Queue, you can manually redirect a call from a queue to another queue or a dialable number.

There are two ways a call can be removed from the system. If a call is moved more than 10 times, either by redirection or by interflow, the call is dropped from the system. You can see the current number of times a call has moved between queues in the Queue Hops column. A call will also be automatically removed from the system if its total time in the system exceeds 24 hours. The Total Time column lists the call's duration in the system.

You can manually redirect a call in the Queued media grid using the following methods:

- Drag and drop a call between queues
- Use the right-click menu to move a call between queues
- Use the right-click menu to send a call to a specific dialable number

You may notice that the first two methods perform the same action. However, the second method is convenient when queue monitor is maximized and you want to move a call without having to resize one or more monitors.

NOTE: If you right-click and redirect a call to a device other than a queue, the call will no longer be considered an ACD call for reporting purposes. If you redirect a call using either of the other two methods, the call remains an ACD call.

When you manually redirect (drag and drop) a call in Interactive Visual Queue, MiContact Center Business changes the way the call is pegged on the Queue Performance reports. If you redirect a call before the short abandon time set for the queue, the call is pegged as *Unavailable*. If you redirect a call after the short abandon time set for the queue, the call is pegged as *Interflowed*. An internal ACD call is pegged as *Abandoned* if the call is redirected at any time.

REDIRECTING CALLS BETWEEN QUEUES

To redirect a call from one queue to another queue using a drag-and-drop operation

1. In the Queued media grid, click anywhere in the row of the call you want to move.
2. Use a drag-and-drop operation to move the call from its original queue monitor to a new queue monitor.

To redirect a call from one queue to another queue using the menu

1. In the Queued media grid, right-click the row of the call you want to redirect and click **Send to**. A list of available queues appears.

   NOTE: You can select multiple rows to move multiple calls to a new queue.

2. Click the name of the queue to which you want to move the call.

REDIRECTING VOICE INTERACTIONS TO SPECIFIC AGENTS

You can transfer voice interactions in queue directly to agents who are available or in Make Busy/Overloaded states. Agents in Do Not Disturb cannot receive transferred interactions and will not appear in the list of available agents.

To redirect voice interactions to agents

1. In the Queued media grid, right-click the row of the interaction you want to redirect and click **Send to=>Agent**.
   A list of available agents who can handle the voice interaction displays.

   NOTE: You can use the search button to locate a specific agent, either by name or reporting number.

2. Click the name of the agent to which you want to send the interaction.
3. Click **OK**.

REDIRECTING CALLS TO SPECIFIC NUMBERS

Using the Send to menu option, you can redirect calls in Interactive Visual Queue to any dialable number, including your own phone.

To redirect a call to a dialable number

1. In the Queued media grid, right-click the row of the call you want to redirect and click **Send to=>[Extension]**.
   When you click [Extension], it changes to a text box.
2. Type a number in the text box and press **Enter**.
   See Figure 53.

   NOTE: You cannot use the Extension option if you have multiple calls selected. Only one call can be sent to a dialable number at a time.
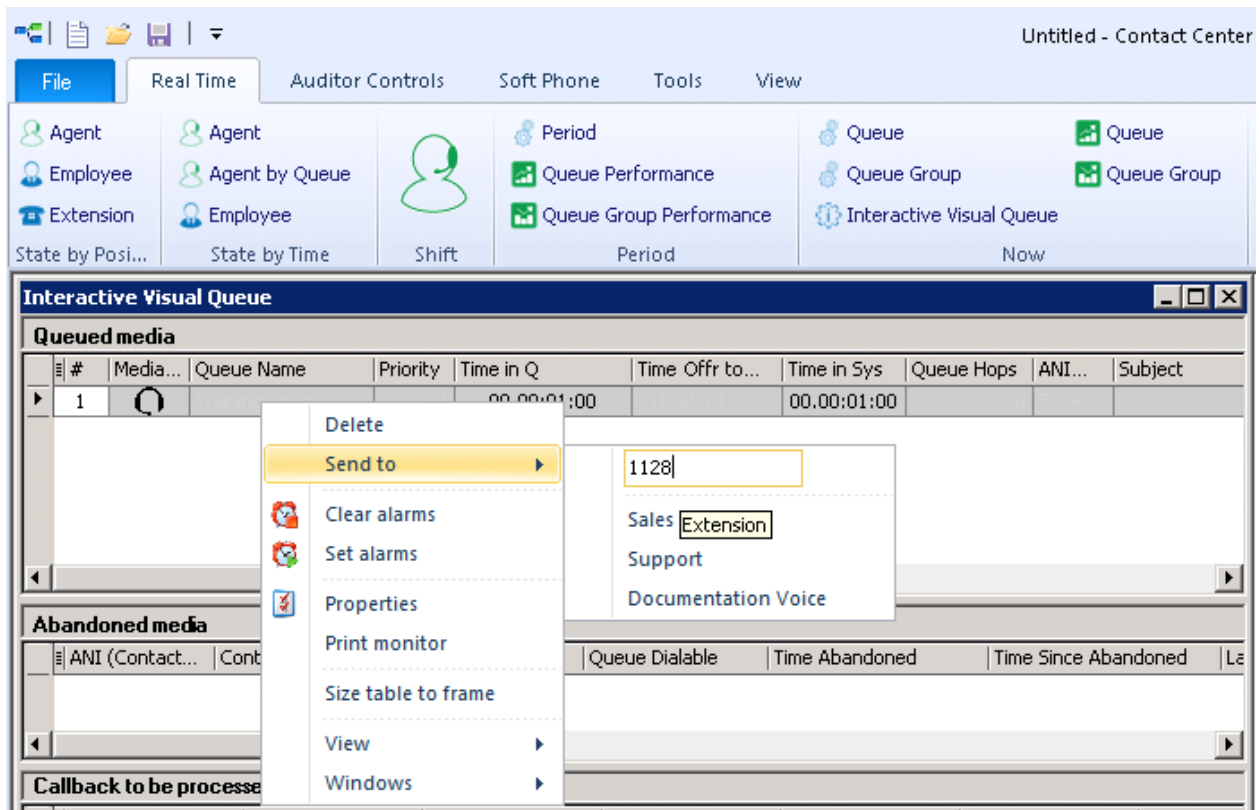
Figure 53: Redirecting a call to an extension

To redirect a call to your phone

1. In the Queued media grid, right-click the row of the call you want to redirect.

2. Click **Send to=>Me**
    NOTE: This option is only available when you have Contact Center Softphone installed and configured on your computer.

REMOVING CALLS

To remove a call from Interactive Visual Queue

1. Right-click the row of the call you want to remove.

2. Click **Delete**.
    The call is removed from Interactive Visual Queue.

NOTE: Deleting a call from an Interactive Visual Queue monitor will not remove it from the actual queue. This will just cause Interactive Visual Queue to stop tracking the call.

CALLING BACK ABANDONED CALLERS

The Abandoned media grid displays abandoned call information and enables agents to call back abandoned callers.

NOTE:

- Abandoned call information is automatically deleted from the Abandoned media grid after 24 hours.
- Abandoned calls cannot be transferred to agents.

To call back an abandoned caller

1. Right-click the row of the abandoned call you want to call back, and select **Call** to automatically dial the abandoned caller.
   NOTE: Each time an agent attempts to call back an abandoned caller, their name and ID are attached to the call record and display in the Last callback employee column of the Abandoned media grid.
2. After you have contacted the abandoned caller, right-click the row associated with that call, and select **Delete** to remove the abandoned call record from the Abandoned media grid.

CONFIGURING ALARMS

You set alarms on Interactive Visual Queue monitors similar to the way you set alarms on Contact Center Client monitors. The main difference is that some of the variables you can monitor, Caller Number, Caller Name, DNIS Number, DNIS Name, Collected Digits, and Collected Information, use a string for their value as opposed to a threshold boundary. For example, you can set an alarm that is triggered when a specific name appears in the Caller Name column.

The value you type for Caller Number or Caller Name alarms is a wildcard, which means the alarm will trigger if that value appears in any form. For example, if you configure a Caller Name alarm for the value *John*, the alarm will trigger for the values *John Smith*, *Johnathan*, *longjohn*, and so on.

To configure alarms:

1. Right-click an Interactive Visual Queue monitor and click **Set alarms**.
   The Set Alarms window appears.
2. Under **Performance variables**, select the variable you want to monitor.
   NOTE: You cannot set Alarm Thresholds for "Callback to be Processed" within the Interactive Visual Queue, but you can set them for "Queued Media" and "Abandoned Media".
3. Under **Alarm thresholds**, click Add value and select a boundary (or value) for the variable you selected as well as the alarm type(s) that will indicate when the variable exceeds those boundaries.
4. If you want to add further alarms for the variable, repeat step 3.
5. Click **OK** to save the alarms.

For more information on configuring monitor alarms, see "Setting alarms" on page 111.

UNDERSTANDING CALL PRIORITY

Each queue has a default priority level. When a call enters the system for the first time, the call adopts the default priority of whichever queue it enters. If all calls in a queue have the same priority, the position of the calls are based on each call's total time in the current queue. If a queue contains calls that have multiple priority levels, higher priority calls will have a higher position in the queue than lower priority calls.

As long as a call remains in a queue, it maintains its priority. However, if a call moves from one queue to another queue, the call's priority may change, based on the method used to move the call.

When you redirect a call manually, the call always adopts the default priority level of the destination queue. For example, suppose Queue 1 has a priority of 1 and Queue 2 has a priority of 15. When a call first enters Queue 1, it has a priority of 1. However, if you manually move that call to Queue 2, using either a drag-and-drop operation or the right-click menu, the call priority lowers to 15. The rules work the same in reverse. If you manually move a priority 15 call from Queue 2 to Queue 1, the call priority increases to 1 when it enters Queue 1.

Calls interflowed automatically retain the original call priority, or adopt the priority of the new queue based on telephone system settings.

VIEWING CALLBACK INFORMATION IN INTERACTIVE VISUAL QUEUE

When licensed for IVR, Interactive Visual Queue also provides the Callback to be processed grid, which displays all callbacks in the displayed queues in the Interactive Visual Queue monitor. Users can access the Callback to be processed grid to manage callbacks in queue. For more information, see "Managing callbacks in Interactive Visual Queue callback monitors" on page 174.

The following list provides descriptions of the column headings available in the Callback to be processed grid:

- *Caller #* displays the phone number provided by the contact
- *Caller Name* displays the contact's name
- *Status* displays the state of the callback
    - *New request*
    - *In progress*
    - *Requeued*
    - *Completed*
    - *Unknown*
- *Priority* the importance level of the callback.
    - *Voice*—Normal
    - *Web*—Normal
    - *Abandoned*—Low

- *Type* displays the type of callback
    - *Voice*
    - *Web*
    - *Abandoned*
- *Reason* displays the callback's reason for its current status
- *Attempted Calls to Agent* displays the number of times the agent attempted the callback
- *Last Time Agent Attempted* displays the last time the agent attempted the callback
- *Request time* displays the specific time at which the callback is scheduled to be processed; this field is populated when the callback is requeued
- *Time Received* displays the specific time the caller submitted the callback request
- *Web IP Address* displays the IP address of the contact who submitted the callback request.
- *Last Attempted Call To Client* displays the specific time the last callback attempt to the caller was made
- *Attempted Calls To Client* displays the number of times the callback was attempted
- *Client Available From* displays the earliest time the contact is available to receive the callback
- *Client Available To* displays the latest time the caller is available to receive the callback
- *ANI* displays the phone number of the caller
- *DNIS* displays the phone number the caller dialed
- *Dialable* displays the number of the device that will handle the callback
- *Device Name* displays the name of the device that will handle the callback
- *Device Type* displays the type of device that will handle the callback – extension, agent, or queue
- *Recorded Message* displays a hyperlink to the voice callback request .wav file left by the caller
- *Area* displays the state, province, or other area the call originated from
- *Country* displays the country the call originated from
- *Endpoint* displays the endpoint attempting to perform the callback
- *Region* displays the region the call originated from

MANAGING CALLBACKS IN INTERACTIVE VISUAL QUEUE CALLBACK MONITORS

Using Interactive Visual Queue's Callback to be processed grid, users can requeue, reject, and delete callbacks from monitors. Requeued callbacks are re-entered into their queue. Rejected callbacks are removed from the queue and will not be offered to employees. Deleted callbacks are removed from the current monitor, but are not removed from the system.

Users can also adjust a callback's priority. Callback priority determines the order of which callbacks will be offered to agents. Callbacks are offered to agents in order of their priority and then by the longest waiting callback of that priority. For example, High priority callbacks are offered before Normal priority callbacks, even if the Normal priority callbacks have been in queue longer.

The following procedures explain how to:

- Requeue a callback
- Reject a callback
- Delete a callback
- Change a callback's priority

To requeue a callback

1. Right-click a callback and select **Requeue**.
2. Select **Yes**.

To reject a callback

1. Right-click a callback and select **Reject**.
2. Select **Yes**.

To delete a callback

1. Right-click a callback and select **Delete**.
2. Select **Yes**.

To change a callback's priority

- Right-click a callback and select **Change priority=>[priority level]**.

Chapter 9

CONTACT CENTER PHONESET MANAGER AND CONTACT CENTER SOFTPHONE

Using Contact Center PhoneSet Manager and Contact Center Softphone

CONTACT CENTER PHONESET MANAGER AND CONTACT CENTER SOFTPHONE

The Contact Center PhoneSet Manager and Contact Center Softphone applications are designed for the 3300 ICP telephone system. They provide ACD agent functions and enable agents to use their desktop computers as IP-based phones.

USING CONTACT CENTER PHONESET MANAGER AND CONTACT CENTER SOFTPHONE

Contact Center PhoneSet Manager and Contact Center Softphone enable agents to use their desktop computers as IP-based phones. Contact Center PhoneSet Manager automates Mitel IP phone sets from the computer desktop. An agent who uses Contact Center PhoneSet Manager has a headset connected to a desk phone. Contact Center Softphone provides complete phone set functionality from the computer desktop. A computer and wired or wireless USB headset deliver calls to the agent.

STARTING CONTACT CENTER CLIENT

Contact Center Softphone and Contact Center PhoneSet Manager reside in Contact Center Client.

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

To start Contact Center Client

1. Open **Contact Center Client**.
2. If prompted, type your **Username** and **Password** and verify the **Enterprise Server** IP address.
3. If you use Secure Socket Layer, select **SSL**.
4. Optionally, select **Remember my credentials**.
5. Click **Login**.

SETTING UP THE SOFT PHONE

The functionality of Contact Center PhoneSet Manager and Contact Center Softphone is similar. For simplicity, we will use *soft phone* when referring to features and functionality common to both applications.

NOTE: Before you set up the soft phone on your client computer, ensure your network administrator has configured your soft phone as a 5020 IP phone on the telephone system.

To set up a client computer to use the soft phone

1. Consult your network administrator to confirm your soft phone extension number.

2. Ensure your headset is connected.

3. Configure sound and audio device properties.
   See "Configuring sound and audio device properties" on page 178.

NOTE: Contact Center Client's PhoneSet Manager function is not supported for use in conjunction with MiCollab SIP Softphone.

CONFIGURING SOUND AND AUDIO DEVICE PROPERTIES

To configure sound and audio device properties for Windows operating systems, you must set the PC speakers as the default audio device and adjust the volume of the PC speakers, headset speakers, and headset microphone.

OPENING THE SOFT PHONE

To open the soft phone

1. In the **Contact Center Client** ribbon, click **Soft Phone**

2. Click the **Soft Phone** icon in the toolbar ribbon.
   The Soft phone configuration window opens.

   See Figure 54.
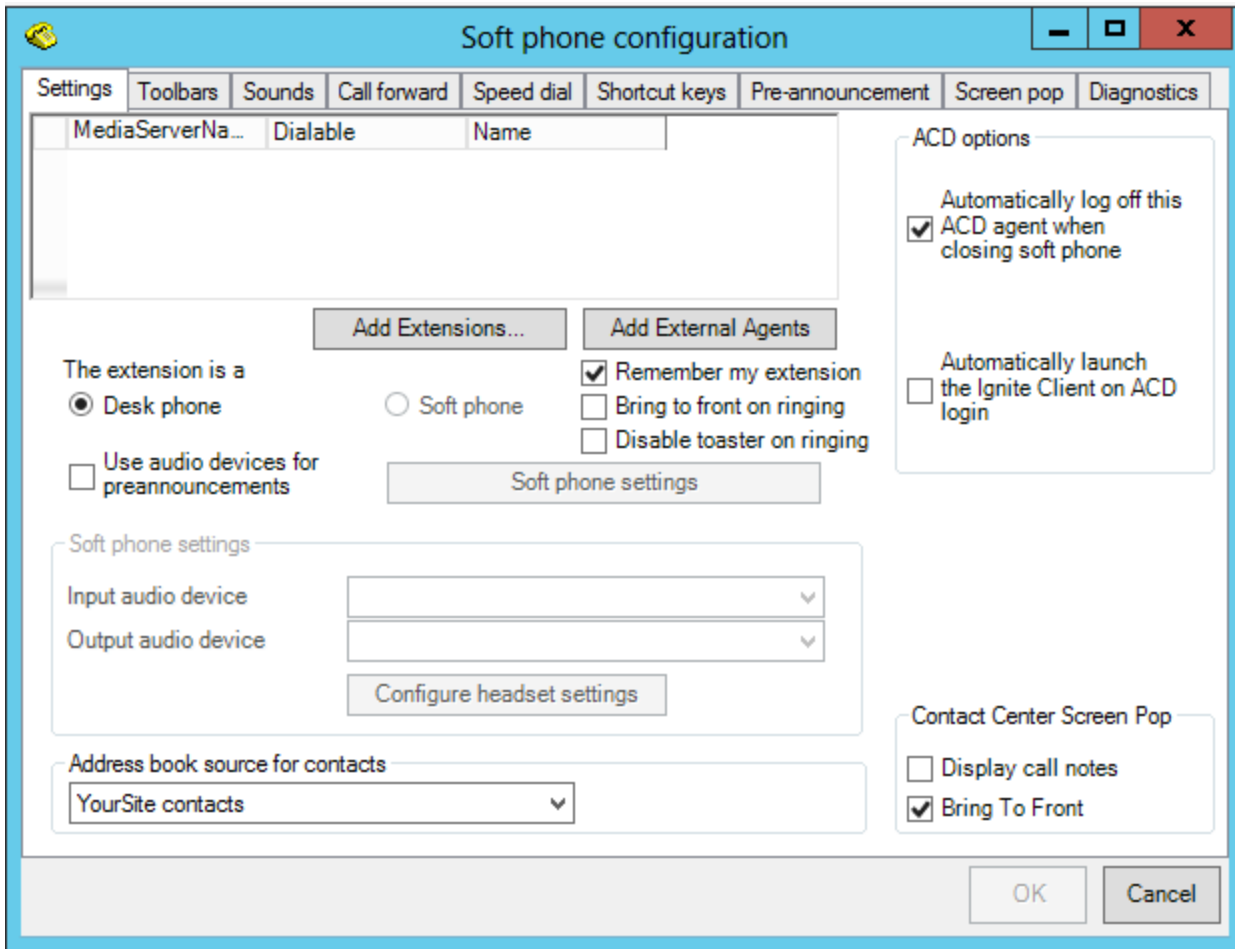
Figure 54: Soft phone configuration window

3. Click **Add Extensions** to search and select from all internal standard extensions, hot desk extensions, and external hot desk user extensions.

4. Click **Add External Agents** to search and select from all external hot desk agent extensions.

5. Select your phone extension from the list of extensions.

6. If you have Contact Center PhoneSet Manager, click **Desk phone**. If you have Contact Center Softphone, click **Soft phone**.

7. If you want to log on automatically to the soft phone with your phone extension the next time you open the current profile, select the **Remember my extension** check box.
You must save the current profile before you quit the soft phone for this option to work.

If you are a hot desk user who participates in the use of PINs, the PIN login dialog box opens. If you are a hot desk user who does not participate in the use of PINs, go to step 10.

NOTE: When logging in as an External Hot Desking Agent or a hot desking user who is not set up to use a PIN login, if the PIN entry window displays, do not enter a PIN; just click **Login**.

8. Type your **Login PIN**.
   If you want Contact Center Client to remember your Login PIN, select the Remember your credentials check box. This option is not available if your Contact Center Client profile is shared. Depending on their security role settings, employees may not be prompted to enter a PIN.

9. Click **Login**.
   NOTE: If the Login PIN you entered is invalid the login will fail and you will be asked to enter a valid Login PIN. If you exceed the configured number of failed login attempts, your PIN will lock and you will need to contact your System Administrator to reset your PIN.

10. If you want Contact Center Client to be the top-most window on ringing, select the **Bring to front on ringing** check box.

11. If you do not want the screen pop windows to display in Contact Center Client when calls are ringing on the desktop, select the **Disable toaster on ringing** check box.

12. If you selected Soft phone in step 6, under **Soft phone settings**, configure soft phone options.
    NOTE: For the relevant configuration information, contact your supervisor or system administrator.

13. After **Address book source for contacts**, select **YourSite contacts**.
    Contact Center PhoneSet Manager and Contact Center Softphone users can access YourSite database phone extensions or Global Address List phone numbers when they handle calls.

14. To automatically log off the agent from the telephone system when closing the soft phone, select the **Automatically log off this ACD agent when closing the soft phone** check box.

15. To automatically launch Ignite (DESKTOP) when logging into Contact Center Softphone or PhoneSet Manager, select the **Automatically launch the Ignite Client on ACD login** check box.
    NOTE: This option only applies to voice agents who use Ignite (DESKTOP) to handle multimedia interactions.

16. To synchronize online presence indicators with ACD agent states in real-time monitors, select the **Synchronize my Lync presence with my ACD state** check box.
    When this option is selected an agent's state changes in sync with Skype for Business presence.

17. To display call notes in the soft phone and on the Call Notes monitor, select the **Display call notes** check box.

18. Click **OK**.
    The Contact Center Client window displays the Soft Phone, Phone and Functions toolbars.
    See Figure 55.
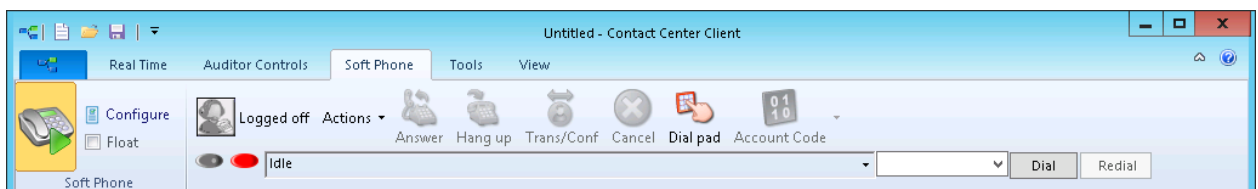
Figure 55: Soft phone toolbars

19. If you want to be able to position the soft phone toolbar elsewhere on your desktop, enable the **Float** check box.

20. To move the soft phone toolbar, hover the mouse over the perforated line on the left-side of the toolbar until the four-headed arrow displays. Then click, drag, and drop it to the desired position on your desktop. To re-anchor the toolbar to the ribbon, drag and drop it into position under the ribbon.

21. If you want to modify the soft phone configuration, click the **Configuration** icon in the toolbar to reopen the Soft phone configuration window.

Changing soft phone IP addresses

If you are required to change the IP address for your soft phone, consult the following procedure:

1. In the **Contact Center Client** ribbon, click **Soft Phone**.

2. Click the **Soft Phone** icon in the toolbar ribbon.

3. In the **Soft phone configuration** window, click **Soft phone settings**.

4. After **Use IP address:** select the new IP address from the drop-down list and click **OK**.
   NOTE: For information on what address to select, contact your supervisor or system administrator.

5. In the **Soft Phone configuration** window, under **'This extension is a'**, click **Desk phone** and then click **Soft phone**.
   NOTE: Clicking 'Desk phone' is required to unbind your soft phone from the previous IP address.

6. Click **OK**.

7. On the ribbon, click **Save**.

THUMBNAIL SOFT PHONE TOOLBAR

The thumbnail soft phone toolbar enables agents to quickly perform soft phone actions when other applications are open on the desktop. The thumbnail toolbar gives agents access to Answer, Hang up, Cancel, and Dial functions and is particularly helpful when the Contact Center Client application is minimized and you want to perform a quick soft phone action. To see the toolbar options, hover over it with your mouse. (Figure 56.)
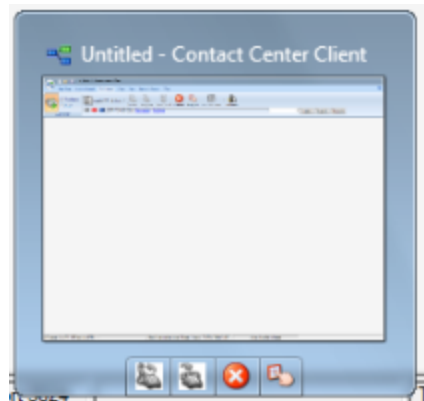
Figure 56: Thumbnail soft phone toolbar

NOTE:

- To enable the thumbnail soft phone toolbar, your Windows operating system must support Windows AERO functionality.
- Because of Windows limitations, this toolbar may not always display when Contact Center Client has focus on the desktop.

LOGGING ON TO THE ACD

Agents can log on to the ACD in a number of ways, such as selecting the Superkey button in Contact Center Softphone, or using the agent control function in Interactive Contact Center.

We recommend that soft phone users who are hot desking agents log on to the ACD using the soft phone Actions menu. This enables the soft phone to identify agents.

NOTE: If you are an External Hot Desking Agent or a hot desking user who logged in internally, logged out, and then chose to log back in externally, you will not be able to log on with the soft phone Actions menu. In order to access this functionality, you must first close and reopen the soft phone toolbar.

To log a standard agent onto ACD

- On the soft phone Functions toolbar, click **Actions=>Log on=>Agents** and select an agent ID.

To log an external hot desking user onto ACD

- On the soft phone Functions toolbar, click **Actions=>Log on=>Hot Desking Users**.

To log an External Hot Desking Agent on to ACD

- On the soft phone Functions toolbar, click **Actions=>Log on=>Agent ID**.

NOTE: When a hot desk agent logs in to the ACD a user license is taken from the available licensing pool and when the agent logs out the license is released back to the licensing pool. Agents are notified upon login attempt if the number of concurrent logins exceeds the number of available user licenses. If there are no available user licenses the login attempt will fail.

PHONE AND FUNCTIONS TOOLBARS

The Phone toolbar displays your

- Extensions (gray oval buttons)
- Hold button (red oval button)
- Superkey button (blue oval button, for Contact Center Softphone only)
- Current phone state (Idle, Dialing, Talking) box with a down arrow that displays a call details window
- Dial box (field for dialing extensions or phone numbers)
- Dial button (Contact Center PhoneSet Manager only)
- Redial button (Contact Center Softphone only)
- Cancel button (Contact Center Softphone only)
- Message button (for retrieving voice mail messages, Contact Center Softphone only)

The Functions toolbar displays

- Your current ACD state (Logged On/Off, in Make Busy, in Do Not Disturb)
- The ACD actions currently available
- Telephony buttons

PHONE FUNCTIONS

You can readily answer calls or forward them to extensions or phone numbers using the soft phone. You can select people from contact and speed dial lists, and perform the following actions: Redial (Contact Center Soft phone only), Transfer, Conference, Mute, Forward, Request help, Hold, Retrieve, Split, Swap, Camp on, Leave a message, Retrieve a message, Call me back, Hang up, and Cancel.

NOTE: External hot desk agents access the 'Answer' and 'Hang up' functions using their external device and not the soft phone toolbar.

Table 19 lists the soft phone telephony options and their corresponding meanings.

Table 19:   Agent actions

ICON		MEANING
	Account Code	tags a call with an Account Code
	Answer	answers a ringing call
	Auto answer	if enabled, answers a ringing call without you having to click Answer
	Call me back	notifies you as soon as the extension number you are trying to call is available
	Camp on	notifies an employee you are attempting to call with a series of audible beeps
	Cancel	terminates your connection to a caller
	Conference	connects three or more people together for an interaction
	Dial pad	enables you to dial a number using a keypad
	Forward	forwards a call to a phone number or extension
	Hang up	terminates a call
	Hold	places the current call on hold

Table 19:   Agent actions (continued)

ICON		MEANING
	Leave a message	leaves a message waiting notification on an employee's extension
	Mute	if you have Contact Center Softphone, disables your microphone so you can consult privately with another employee while on a call
	Request help	calls an employee who can click Answer and listen to an in-progress call without the caller knowing
	Retrieve	picks up a call that is held or camped on to your extension
	Speed dial	enables you to make a call to a specified number with one mouse click
	Split	disconnects one person from a conference call
	Swap	swaps between the current and the held party
	Transfer	forwards an in-progress call to another answer point
	Transfer/Conference	places a caller on hold and makes a consultation call
	Volume	if you have Contact Center Softphone, adjusts the volume of your speakers and/or microphone
	Call Notes	enables you to view the notes associated with the current call and add notes. Call notes are supported for inbound calls only.

CUSTOMIZING THE SOFT PHONE

The following section describes how you can further customize your soft phone.

Selecting audio devices

To select audio devices

1. Click **Configure** next to the phone icon in the Soft Phone ribbon.
2. After **Input audio device**, select an audio device for your microphone.
3. After **Output audio device**, select an audio device for your speakers or headset.
   NOTE: You can configure the soft phone to use the "Default Communication Device" by selecting the option. When idle or during a call or while on hold, you can switch the audio device and the configured "Default Communication Device" temporarily changes to an available device, which is usually the "Default Audio Device". After you switch back to the your audio device, it switches the "Default Communication Device" back to the configured device.
4. Click **OK**.

Specifying the address book source for contacts

To specify the address book the soft phone uses for contacts (the YourSite database)

1. Right-click the Phone toolbar and click **Configure**.
2. After **Address book source for contacts**, select **YourSite contacts**.
3. Click **OK**.

Resizing toolbar buttons

To resize toolbar buttons

1. Right-click the Phone toolbar and click **Configure**.
2. Click the **Toolbars** tab.
3. After **Functions toolbar**, select a size for displaying the Functions toolbar buttons.
4. After **Phone toolbar**, select a size for displaying the Phone toolbar buttons.
5. Click **OK**.

Displaying, hiding, and retiring toolbar buttons

You can display telephony buttons, hide them so they appear on the Functions toolbar only when required, and retire them for actions you rarely perform, such as Camp on and Request help.

To display telephony buttons

1. Right-click the Phone toolbar and click **Configure**.
2. Click the **Toolbars** tab.
3. Under **Selected buttons**, select the check boxes of the telephony buttons you want to display.
4. Click **OK**.

To hide telephony buttons

1. Right-click the Phone toolbar and click **Configure**.

2. Click the **Toolbars** tab.

3. Under **Selected buttons**, clear the check boxes of the telephony buttons you want to hide from view.

4. Click **OK**.

To retire telephony buttons

1. Right-click the Phone toolbar and click **Configure**.

2. Click the **Toolbars** tab.

3. Under **Selected buttons**, select the telephony buttons you want to retire and click the left arrow to add these buttons to the Available buttons list.

4. Click **OK**.

To restore telephony buttons

1. Right-click the Phone toolbar and click **Configure**.

2. Click the **Toolbars** tab.

3. Under **Available buttons**, select the telephony buttons you want to restore and click the right arrow to add these buttons to the Selected buttons list.

4. Click **OK**.

Repositioning toolbar buttons

To specify the order in which telephony buttons appear

1. Right-click the Phone toolbar and click **Configure**.

2. Click the **Toolbars** tab.

3. Under **Selected buttons**, select a telephony button.

4. Click the up or down arrow to change the position of the button relative to other buttons on the Functions toolbar.

5. Click **OK**.

Configuring sounds and notifications

You can configure sounds for individual phone events for incoming calls, secondary incoming calls, and/or the digits dialed on your primary extension, or on all extensions. A primary incoming call is a call you receive while you are in the idle state and are available to take the call. A secondary incoming call is a call you receive while you are on a call on another extension and are not available to take the call.

Every time you receive a call a pop-up window notifies you the call has arrived. You can disable the pop-up notification.

To configure a sound for a phone event

1. Right-click the Phone toolbar and click **Configure**.

2. Click the **Sounds** tab.

3. Select the **Incoming calls**, **Secondary incoming calls**, and/or **Play sounds when dialing digits** check boxes.

4. After **Phone events**, select a phone event.

5. After **Sound file name**, click **Browse** and select a sound file.

6. If you want to play the sound file when the phone event occurs on any of your extensions, click **Apply to all lines**.

7. Click **OK**.

To disable the call arrival pop-up notification

1. Right-click the Phone toolbar and click **Configure**.

2. Click the **Sounds** tab.

3. Under **Phone events**, click a phone line.

4. Clear the **Display pop-up notification for incoming calls** check box.

5. Click **OK**.

Enabling and disabling Contact Center Screen Pop

Depending on administrative settings, Contact Center Screen Pop can launch applications or webpages when calls are received and enable agents to automatically receive caller and account information via pop-ups on their desktops for incoming calls.

When you enable or disable Contact Center Screen Pop, the settings you select determine Contact Center Screen Pop accessibility on a per-agent profile basis.

To enable or disable Contact Center Screen Pop

1. Click **Soft Phone=>Configure**.
   The Soft phone configuration window opens.

2. Click the **Screen pop** tab.

3. To enable Contact Center Screen Pop, select the **Display Contact Center Screen Pop** check box.

4. To disable Contact Center Screen Pop, clear the **Display Contact Center Screen Pop** check box.

5. Click **OK**.

Making calls ring through your computer speakers

You can make calls ring through your computer speakers instead of your headset.

To make calls ring through your computer speakers

1. Right-click the Phone toolbar and click **Configure**.

2. Click the **Sounds** tab.

3. After **Play the rings sounds on** select the sound output device for your computer speakers.

Adjusting the volume of your speakers and microphone

If you have Contact Center Softphone, you can adjust the volume of your speakers and microphone.

To adjust the volume of your speakers

1. Right-click the Phone toolbar and click **Configure**.
2. Click the **Sounds** tab.
3. Adjust the volume by moving the speaker slider.

To adjust the volume of your microphone

1. Right-click the Phone toolbar and click **Configure**.
2. Click the **Sounds** tab.
3. Adjust the volume by moving the microphone slider.

Configuring call forward destinations

You can forward calls manually to pre-configured call forward destinations. In addition, you can configure and enable call forwarding so the telephone system forwards calls to other answer points when you are temporarily unavailable or away from the office. For example, you could specify all External call busy calls (external calls to your extension when you are unavailable) you receive be forwarded to a co-worker's extension. Rather than directing these calls to voice mail, the telephone system would forward these calls to your co-worker.

NOTE: MiContact Center Business and MiVoice Analytics Version 9.0 do not support Call Forward Always *from* Ring Groups. Call Forward Always *to* Ring Groups is supported.

To configure call forward destinations for calls you will forward manually

1. Right-click the Phone toolbar and click **Configure**.
2. Click the **Call forward** tab.
3. Under **Name**, type the name of the person to whom you will forward calls.
4. Under **Number,** type an extension or phone number (preceded by a number you dial to access an outside line).
5. Click **OK**.

To configure and enable call forward destinations for calls the telephone system will forward

NOTE: MiContact Center Business and MiVoice Analytics Version 9.0 do not support Call Forward Always *from* Ring Groups. Call Forward Always *to* Ring Groups is supported.

1. Right-click the Phone toolbar and click **Configure**.
2. Click the **Call forward** tab.
3. Specify the source for call forwarding.
4. Specify destinations for the following call types:
    - All calls (all calls you receive)
    - External call busy (external calls to your extension when you are unavailable)
    - External call no answer (external calls to your extension that you do not answer)
    - Internal call busy (internal calls to your extension when you are unavailable)
    - Internal call no answer (internal calls to your extension that you do not answer)
5. To activate the call forwarding rules immediately, select the **Enabled** check boxes of the call forwarding types to be activated.
6. Click **OK**.

Configuring speed dial numbers

When you pre-configure speed dial numbers in Contact Center Softphone, these contacts are available in drop-down lists adjacent to the Speed dial, Trans/Conf, and Request help buttons on the Functions toolbar.

You can display a button for each speed dial number or display one button with a down arrow that lists all of the speed dial numbers you have configured. You can speed dial calls manually to pre-configured extensions and phone numbers.

To configure a speed dial number

1. Right-click the Phone toolbar and click **Configure**.
2. Click the **Speed dial** tab.
3. Under **Name**, type the name of the person to whom you will speed dial calls.
4. Under **Number,** type an extension or phone number (preceded by a number you dial to access an outside line).
5. Click **OK**.

Configuring shortcut keys

You can assign a shortcut key to a telephony function to perform it with a simple keystroke. This enables you to perform telephony functions while the soft phone is minimized or another application is currently selected.

To configure a shortcut key for a telephony function

1. Right-click the Phone toolbar and click **Configure**.
2. Click the **Shortcut keys** tab.
3. Under **Shortcut key**, select a telephony function.
4. Click the down arrow, select **Ctrl**, **Alt**, **Shift**, or **Win**, and select a keyboard number, letter, or function from the list.
5. Click **OK**.

Configuring pre-announcement messages

Agents who have Contact Center PhoneSet Manager or Contact Center Softphone can record introductions that are played to callers (for example, 'Hi. This is Paul Jones in Customer Support. Could you please tell me your customer site key?') The introduction that is played is based on the queue the call arrives on and the time of day it is received. The recorded introduction provides customers with a consistent greeting and gives the agent extra time to retrieve customer information. You can stop pre-announcement messages at any time.

You can configure more than one pre-announcement rule. For each rule, you specify the conditions in which the soft phone will play a particular pre-announcement message. If one or more conditions is satisfied for a particular rule, the soft phone will play the associated pre-announcement message. You can order the rules on the Pre-announcement rules table to establish their priority. Pre-announcement rules are evaluated in the order shown in the table. If one pre-announcement rule is satisfied, the associated sound file is played and no other rules are evaluated.

To use pre-announcement messages with Contact Center PhoneSet Manager, you must have a Mitel ACD desk phone (for example, 5212) and a PCTI adaptor. The PCTI adaptor enables the audio being played from the agent PC and the audio from the agent desk phone to be mixed.

To connect a PCTI adapter to your computer for use with Contact Center PhoneSet Manager

1. Set the PCTI switch to **Both**.

2. Set the PCTI switch to **HeadSet**.

3. Plug the Mic/Audio cable of the headset into the appropriate Mic/Audio inputs on the PCTI adapter.

4. Unplug the handset from the deskphone and plug it into the handset plug on the PCTI adapter.

5. Plug the telephone input cable of the PCTI adapter into the telephone base.

6. Plug the computer input of the PCTI adapter into the appropriate Mic/Speaker inputs on the PC.
   NOTE: Ensure the headset is turned on, on the deskphone base.

To configure a pre-announcement rule for Contact Center PhoneSet Manager

1. Right-click the Phone toolbar and click **Configure**.

2. Under **This extension is a**, select **Desk phone**.

3. To use audio devices for pre-announcements, select **Use audio devices for pre-announcements** and specify the input and output audio device.

4. Click the **Pre-announcement** tab.

5. Click **Add rule**.
   The Add / Edit pre-announcement rule window opens.

6. Select the conditions that determine when the pre-announcement message will play.

7. Specify parameters for each condition.

8. Select or record a wave file to play when the above conditions are met.

9. Type a name for the pre-announcement rule.

10. If you want to hear ringing on your desk phone, select **Enable ringing sound in desk phone**.

11. Click **OK**.

To configure a pre-announcement rule for Contact Center Softphone

1. Right-click the Phone toolbar and click **Configure**.

2. Under **This extension is a**, select **Soft phone**.

3. Click the **Pre-announcement** tab.

4. Click **Add rule**.
   The Add / Edit pre-announcement rule window opens.

5. Select the conditions that determine when the pre-announcement message will play.

6. Specify parameters for each condition.

7. Select or record a wave file to play when the above conditions are met.

8. Type a name for the pre-announcement rule.

9. Click **OK**.

To re-order pre-announcement rules

1. Select a rule.

2. Click the up or down arrow to change the priority of the rule.

3. Click **OK**.

NOTE: You can alternately configure whisper announcements using agent workflows in IVR. See the *MiContact Center Business Installation and Administration Guide* for more information.

MAKING AND TERMINATING CALLS USING CONTACT CENTER PHONESET MANAGER

When you make calls, on the Functions toolbar you can readily select contacts you pre-configure in CCMWeb, or speed dial numbers you configure in Contact Center PhoneSet Manager. See "Configuring speed dial numbers" on page 190 and "Displaying, hiding, and retiring toolbar buttons" on page 186.

You can dial any extension number or phone number. Contact Center PhoneSet Manager typically uses your primary extension to make calls. You can optionally select a different extension on the Phone toolbar to make calls.

Making calls

To dial by phone number or extension number using Contact Center PhoneSet Manager

1. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the dial box and type a number or extension on the dial pad.

2. Click **Dial**.

3. If you want to view the call details window, click the down arrow adjacent to the box that displays your current phone state.
   See Figure 57.

To dial internally from a real-time monitor using Contact Center PhoneSet Manager

- From any real-time monitor, right-click an agent, employee, or extension cell and click **Call**.
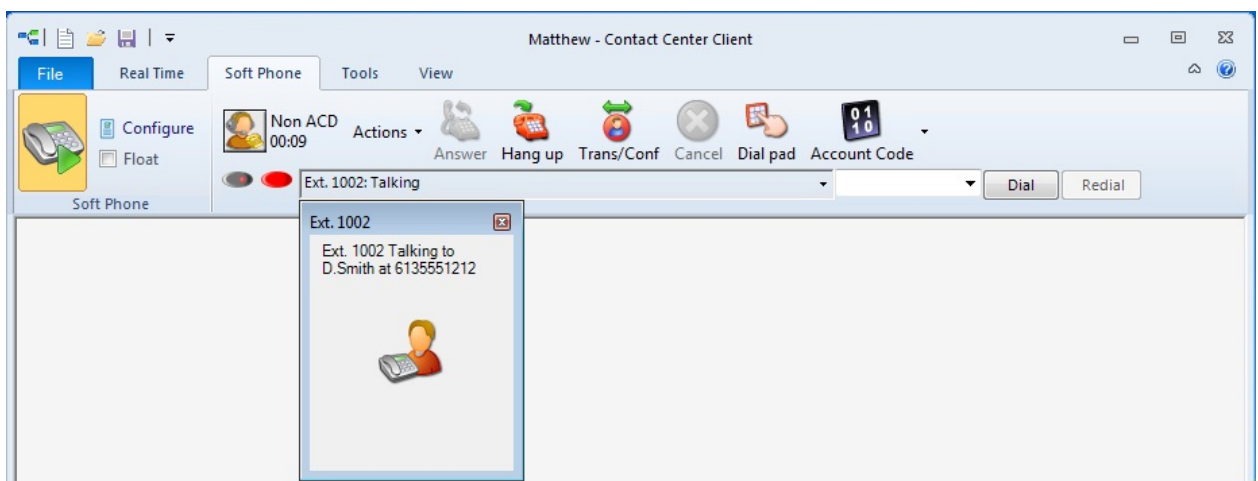
Figure 57: Making a call

Making calls to your contacts

To make a call to an extension in your contact list

1. Click the arrow adjacent to the dial box and click the **Contacts** tab.
2. Select a contact in the list.
3. Click **Dial**.

Making calls using speed dial

To dial using speed dial

- Click **Speed dial** and select a name in the list.

Terminating calls

To terminate a call

- Click **Hang up**.

FORWARDING AND ANSWERING CALLS USING CONTACT CENTER PHONESET MANAGER

You can forward calls manually to pre-configured call forward destinations without having to speak to the caller first. In addition, you can configure and enable call forwarding so the telephone system forwards calls to other answer points when you are temporarily unavailable or away from the office. See "Configuring call forward destinations" on page 189.

If a call is ringing on your extension and you click the Forward button, the call will be forwarded to the default call forward destination configured in the telephone system. If you click the down arrow adjacent to the Forward button, you can select an extension or phone number for call forwarding.

Forwarding calls

When a call is ringing on your extension, to forward the call using Contact Center PhoneSet Manager

1. Click **Forward**.
2. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Forward button and select a contact.
3. Click **Dial**.

Answering calls

When an agent receives a call with Contact Center PhoneSet Manager detailed caller information is displayed on the desktop. (See Figure 58.) Agents can choose to answer the call or forward it to another agent. Additionally, the display can provide access to call notes, which are notes an agent adds to the call before transferring it. See "Adding call notes to a call" on page 195.

If configured and available the following information is provided in the soft phone display

- **Caller name**—name of the caller
- **ANI**—telephone number of the caller
- **DNIS**—telephone number the caller dials
- **DNIS name**—the name associated to the DNIS number in YourSite database
- **Agent ID**— agent who transferred the call
- **Extension**—extension from which the call was transferred
- **Queue**—queue from which the call originated
- **Collect Caller Entered Digits**—digits the caller enters for identification purposes, such as a customer site key
- **Customer Collected Information**—information collected from a third party OBDC database
- **Call notes**—notes added by an agent
  NOTE: Call notes are supported for inbound calls only.

You can answer calls by right-clicking the Contact Center PhoneSet Manager system tray icon and selecting Answer, or by clicking the Answer toolbar button.
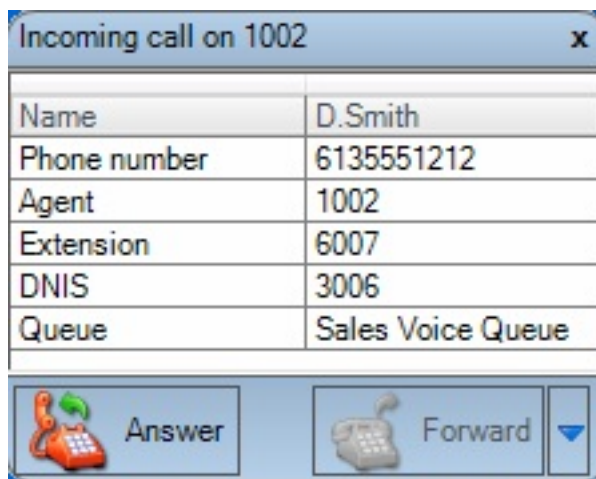
Figure 58: Contact Center PhoneSet Manager display

To answer a call using Contact Center PhoneSet Manager

- Click **Answer**.

HANDLING CALLS USING CONTACT CENTER PHONESET MANAGER

You can handle calls by right-clicking the Contact Center PhoneSet Manager system tray icon and selecting telephony functions, or by selecting telephony buttons on the Functions toolbar. The telephony buttons available depend on the action you last performed. You can configure the toolbar buttons so they are always visible, or visible only when required. See "Displaying, hiding, and retiring toolbar buttons" on page 186.

When you pre-configure speed dial numbers in Contact Center PhoneSet Manager, these contacts are available in drop-down lists adjacent to the Speed dial, Trans/Conf, and Request help buttons on the Functions toolbar. See "Configuring speed dial numbers" on page 190.

Placing calls on hold

To place a call on hold

- Click **Hold** (red oval button).

Retrieving calls

You can retrieve a held call, or retrieve a call when a call is camped on to your extension.

When an agent is on a call and another caller camps on to their extension, the Retrieve button is enabled. When the agent presses the Retrieve button, they can talk to the held party. From that point on, the agent uses the Swap button to switch back and forth between the two callers (current and held parties).

To retrieve a call

- Click **Retrieve**.

Adding call notes to a call

When employees are speaking with customers, they can add notes to calls to share with other employees involved in the call. This ensures all employees have context on calls and know what information has been provided to customers upon call transfer.

When a call is being transferred to an employee, the soft phone display shows the most recent note associated with the call. When the employee answers the call, Contact Center Client appears on top of all other open applications and displays the Call Notes monitor. The monitor includes all of the call notes associated with the current call.

Employees can add notes each time a call is transferred, and employees on conference calls can add notes simultaneously. Each set of notes includes the employee's name and a date/time stamp. When an employee completes a call and answers a new call or closes the Call Notes monitor, all call note information is saved and included in the Lifecycle reports. Call notes are not preserved when a call is parked.

NOTE:

- Call notes are supported for inbound calls only.
- On the Soft phone configuration window, you can clear the Enable call notes check box to hide the Call Notes monitor and prevent call notes from being displayed. Optionally, you can enable the Bring to front check box to ensure call notes display on top of all other windows when calls are received.
- You must have Contact Center PhoneSet Manager or Contact Center Softphone open in order to view or add call notes.
- Time stamps are based on the 3300 ICP telephone system clock.

To add a call note

1. As a call is ringing on your extension, on the soft phone display click **Answer** to answer the call.
   Contact Center Client appears on top of all open applications and displays the Call Notes monitor.

2. After **Enter a new call note**, type a note.
   Call notes can include a maximum of 100 characters.

3. Click **Add**.
   The call note is added to the Call notes text box and is included in the soft phone display upon call transfer.

Transferring calls

You can perform a blind transfer or a supervised transfer.

To perform a blind transfer

1. While on a call, click **Trans/Conf**.

2. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line if required). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.

3. Click **Dial**.

4. Click **Hang up**.

To perform a supervised transfer

1. While on a call, click **Trans/Conf**.

2. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.

3. Click **Dial**.
   The system places the caller on Hold.

4. Wait for the called party to answer. If you receive a busy signal or a voice mail greeting, click **Cancel** to return to the initial party. Otherwise, speak to the agent and identify the caller.

5. Click **Transfer** to transfer the call.

Conferencing calls

You can include up to eight people in a conference call. The following example illustrates a three-way conference call.

To set up a conference call

1. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line).

2. Click **Dial**.

3. After you speak with the person who answers, click **Trans/Conf** to add a person to an in-progress call.
   The system places the person on hold.

4. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.

5. Click **Dial**.

6. Speak to the person who answers.

7. Click **Conference** to initiate a three-way conference call.

To split a conference call

- Click **Split**.
  The last person you added to the conference call is placed on hold, and you can speak privately with the first person.

Consulting with people while on calls

To consult with a person while on a call

1. Click **Trans/Conf** to conference in the person.
   The system places the initial party on Hold.

2. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.

3. Click **Dial**.

4. After you consult with the person, either click **Conference** to conference in the person, click **Cancel** to hang up on the person, click **Transfer** to transfer the call to the person, or click **Swap** to talk to the initial party.

Requesting help while on calls

To request help while on a call

1. Click **Request help**.

2. On the dial pad, type the extension number of the employee you want to call. Otherwise, click the down arrow adjacent to the Request help button and select a contact.

3. Click **Dial**.
   The system calls the employee. The employee can click Answer and listen in on the call without the caller knowing and can click Conference to join the interaction at any time.

Using Camp on

The Camp on feature is available when you make a call to an extension and receive a busy signal because the employee is already on a call. Camp on notifies the employee you are attempting to call with a series of audible beeps.

NOTE:

- Callers cannot camp on to your extension if you have call forwarding or voice mail configured on the extension.

- You cannot camp on to an extension that is in Make Busy or Do Not Disturb.

To camp on to an extension

1. In the dial box, type an extension number.
2. Click **Dial**.
3. If you receive a busy signal, click **Camp on**.
   The employee you called will hear a series of beeps and can click Retrieve to place the caller on hold and speak with you. After speaking with you, the employee can click Swap to return to the caller.

Leaving and retrieving messages

The Leave a message feature is available when you make a call to an extension that is idle or on a call. You must use the dial pad to type a number when you are retrieving a message.

To leave a message

1. In the dial box, type an extension number.
2. Click **Dial**.
3. If the employee does not answer, click **Leave a message**.
   The telephone system leaves a message waiting notification on the employee's extension and the Contact Center Client icon flashes red and white in the employee's system tray.

To retrieve a message

1. Click **Dial pad** and type the number configured in the telephone system for message retrieval.
2. Press **Enter**.
   The automated attendant will ask you for your password.
3. Type your password on the dial pad.
4. Follow the instructions provided by the automated attendant to retrieve the message.

NOTE: If agents leave Call me back messages you must use your physical phone set to retrieve the messages.

Using Call me back

The Call me back feature is available when you make a call to an extension that is idle or on a call. When you select the Call me back button, the telephone system monitors the called employee's other extension. When the employee's other extension returns to idle, your phone rings. If you pick up the call, the employee's phone will ring. If you do not pick up the call, the callback will expire.

To leave a callback message

1. In the dial box, type an extension number.
2. Click **Dial**.
3. If the employee does not answer, click **Call me back**.
   The telephone system monitors the called employee's extension. Your phone will rings when the called employee's other extension returns to the idle state.
4. When your phone rings, click **Answer** to pick up the call and speak with the employee.

Tagging calls with Account Codes

If your system is set up to use Account Codes, you can apply them during a call. Classification Codes are a type of Account Code, but differ in that you can apply them during or after a call. Classification Codes can only to be applied to ACD calls. If you are set up to use Account Codes, you are not necessarily also set up to use Classification Codes.

To tag an in-progress call with an Account Code or a Classification Code

- Click the down arrow adjacent to the **Account Code** button and select a traditional Account Code or a Classification Code.

After hanging up, while in Work Timer mode, you can tag calls with Classification Codes.

To tag a call, after hanging up, with a Classification Code

1. Click the down arrow adjacent to the **Account Code** button.
2. Select **After Call Classification** and select the appropriate Classification Code from the drop-down list.

MAKING AND TERMINATING CALLS USING CONTACT CENTER SOFTPHONE

When you make calls, on the Functions toolbar you can readily select from contacts you pre-configure in CCMWeb, or speed dial numbers you configure in Contact Center Softphone. See "Configuring speed dial numbers" on page 190 and "Displaying, hiding, and retiring toolbar buttons" on page 186.

You can dial any extension number or phone number. Contact Center Softphone typically uses your primary extension to make calls. You can optionally select a different extension on the Phone toolbar to make calls.

Making calls

To dial by phone number or extension number

1. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the dial box and type a number or extension on the dial pad.
2. If you want to view the call details window, click the down arrow adjacent to the box that displays your current phone state.
   See Figure 59.

To dial internally from a real-time monitor

- From any real-time monitor, right-click an agent, employee, or extension cell and click **Call**.
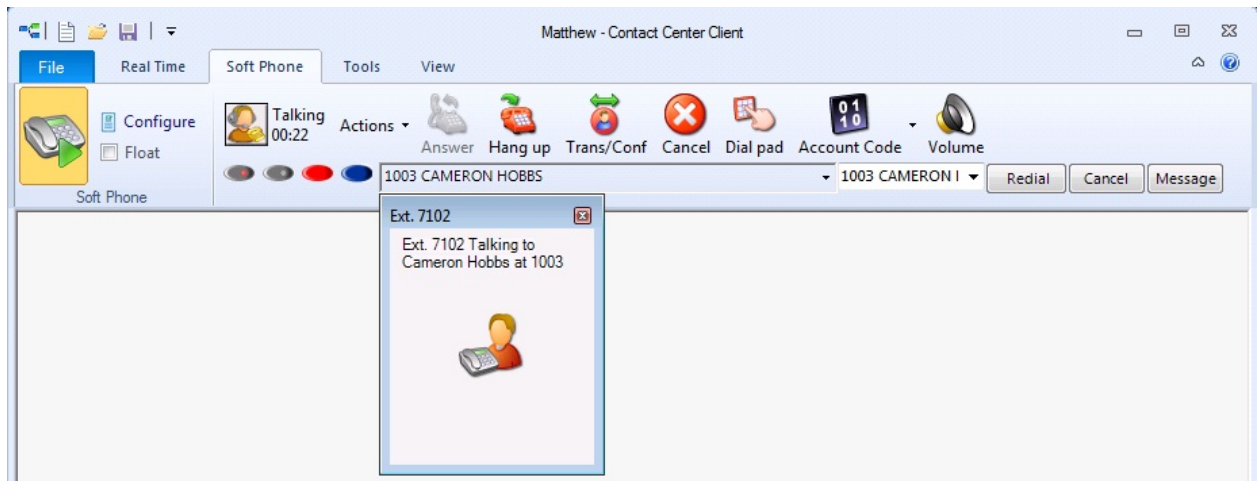
Figure 59: Making a call

Making calls to your contacts

To make a call to an extension in your contact list

1. Click the arrow adjacent to the dial box and click the **Contacts** tab.
2. Double-click a contact in the list.

Making calls to contacts who have called you recently

To make a call to a contact who has called you recently

1. Click the arrow adjacent to the dial box and click the **Recent** tab.
2. Double-click a contact in the list.

Making calls using speed dial

To dial using speed dial

- Click **Speed dial** and select a name in the list.

Redialing numbers

To dial the contact who last called you

- Click **Speed dial** and select a name in the list.

Terminating calls

To terminate a call

- Click **Hang up**.
  Alternatively, on the Phone toolbar, click **Cancel**.

FORWARDING AND ANSWERING CALLS USING CONTACT CENTER SOFTPHONE

You can forward calls manually to pre-configured call forward destinations without having to speak to the caller first. In addition, you can configure and enable call forwarding so the telephone system forwards calls to other answer points when you are temporarily unavailable or away from the office. See "Configuring call forward destinations" on page 189.

If a call is ringing on your extension and you click the Forward button, the call will be forwarded to the default call forward destination configured in the telephone system. If you click the down arrow adjacent to the Forward button, you can select an extension or phone number for call forwarding.

Forwarding calls

When a call is ringing on your extension, to forward the call

1. Click **Forward**.
2. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Forward button and select a contact.

Answering calls

When an agent receives a call with Contact Center Softphone, detailed caller information is displayed on the desktop. (See Figure 60.) Agents can choose to answer the call or forward it to another agent. Additionally, the display can provide access to call notes, which are notes an employee adds to the call before transferring it. See "Adding call notes to a call" on page 195.

If configured and available the following information is provided in the soft phone display

- **Caller name**—name of the caller
- **ANI**—telephone number of the caller
- **DNIS**—telephone number the caller dials
- **DNIS name**—the name associated to the DNIS number in YourSite database
- **Agent ID**— agent who transferred the call
- **Extension**—extension from which the call was transferred
- **Queue**—queue from which the call originated
- **Collect Caller Entered Digits**—digits the caller enters for identification purposes, such as a customer site key
- **Customer Collected Information**—information collected from a third party OBDC database
- **Call notes**—notes added by an agent
  Call notes are supported for inbound calls only.

You can answer calls by right-clicking the Contact Center Softphone system tray icon and selecting Answer, or by clicking the Answer toolbar button.
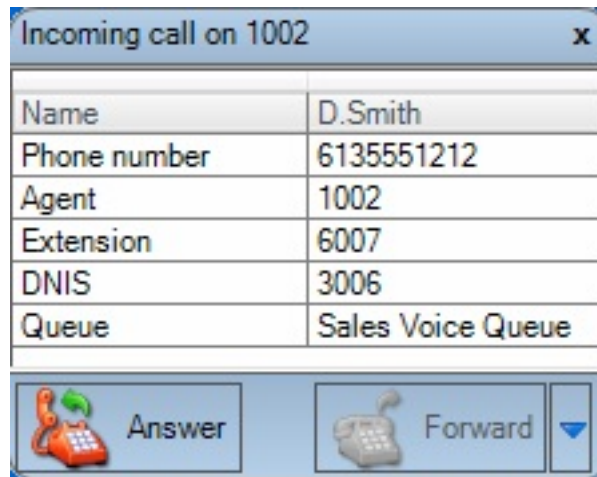
Figure 60: Contact Center Softphone display

To answer a call using Contact Center Softphone

- Click **Answer**.

HANDLING CALLS USING CONTACT CENTER SOFTPHONE

You can handle calls by right-clicking the Contact Center Softphone system tray icon and selecting telephony functions, or by selecting telephony buttons on the Functions toolbar. The telephony buttons available depend on the action you last performed. You can configure the toolbar buttons so they are always visible, or visible only when required. See "Displaying, hiding, and retiring toolbar buttons" on page 186.

When you pre-configure speed dial numbers in Contact Center Softphone, these contacts are available in drop-down lists adjacent to the Speed dial, Trans/Conf, and Request help buttons on the Functions toolbar. See "Configuring speed dial numbers" on page 190.

Placing calls on hold

To place a call on hold

- Click **Hold** (red oval button).

Retrieving calls

You can retrieve a held call, or retrieve a call when a call is camped on to your extension.

When an agent is on a call and another caller camps on to their extension, the Retrieve button is enabled. When the agent presses the Retrieve button, they can talk to the held party. From that point on, the agent uses the Swap button to switch back and forth between the two callers (current and held parties).

To retrieve a call

- Click **Retrieve**.

Using Mute

To use Mute

1. Click **Mute**.
   The system disables your microphone so you can consult privately with another employee.

2. To restore your microphone, click **Resume**.

Transferring calls

You can perform a blind transfer or a supervised transfer.

To perform a blind transfer

1. While on a call, click **Trans/Conf**.

2. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.

3. Click **Hang up**.

To perform a supervised transfer

1. While on a call, click **Trans/Conf**.

2. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.
   The system places the caller on hold.

3. Wait for the called party to answer. If you receive a busy signal or a voice mail greeting, click **Cancel** to return to the initial party. Otherwise, speak to the agent and identify the caller.

4. Click **Transfer** to transfer the call.

Conferencing calls

You can include up to eight people in a conference call. The following example illustrates a three-way conference call.

To set up a conference call

1. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line).

2. After you speak with the person who answers, click **Trans/Conf** to add a person to an in-progress call.
   The system places the person on hold.

3. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.

4. Speak to the person who answers.

5. Click **Conference** to initiate a three-way conference call.

To split a conference call

- Click **Split**.
  The last person you added to the conference call is placed on hold, and you can speak privately with the first person.

Consulting with people while on calls

To consult with a person while on a call

1. Click **Trans/Conf** to conference in the person.
   The system places the initial party on hold.
2. In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.
3. After you consult with the person, either click **Conference** to conference in the person, click **Cancel** to hang up on the person, click **Transfer** to transfer the call to the person, or click **Swap** to talk to the initial party.

Requesting help while on calls

To request help while on a call using Contact Center Softphone

1. Click **Request help**.
2. On the dial pad, type the extension number of the employee you want to call. Otherwise, click the down arrow adjacent to the Request Help button and select an employee.
   The system calls the employee. The employee can click Answer and listen in on the call without the caller knowing and can click Conference to join the interaction at any time.

Using Camp on

The Camp on feature is available when you make a call to an extension and receive a busy signal because the employee is already on a call. Camp on notifies the employee you are attempting to call with a series of audible beeps.

NOTE:

- Callers cannot camp on to your extension if you have call forwarding or voice mail configured on the extension.
- You cannot camp on to an extension that is in Make Busy or Do Not Disturb.

To camp on to an extension

1. In the dial box, type an extension number.
2. If you receive a busy signal, click **Camp on**.
   The employee you called will hear a series of beeps and can click Retrieve to place the caller on hold and speak with you. After speaking with you, the employee can click Swap to return to the caller.

Leaving and retrieving messages

The Leave a message feature is available when you make a call to an extension that is idle or on a call.

To leave a message

1. In the dial box, type an extension number.
2. If the employee does not answer, click **Leave a message**.
   The telephone system leaves a message waiting notification on the employee's extension and the Contact Center Client icon flashes red and white in the employee's system tray

To retrieve a message

1. In the dial box, type your voice mail access number.
   The automated attendant will ask you for your password.
2. In the dial box, type your password.
3. Follow the instructions provided by the automated attendant to retrieve the message.
   NOTE: After you have checked your messages, you must clear them manually. They will not be automatically cleared.

To clear a message

1. On the Phone toolbar, click **Message**.
2. After **CALL ME BACK?**, click **Yes**.
3. Click **Erase**.
   The telephone image displays **NO MORE MESSAGES**.

Using Call me back

The Call me back feature is available when you make a call to an extension that is idle or on a call. When you select the Call me back button, the telephone system monitors the called employee's other extension. When the employee's other extension returns to idle, your phone rings. If you pick up the call, the employee's phone will ring. If you do not pick up the call, the callback will expire.

To leave a callback message

1. In the dial box, type an extension number.
2. If the employee does not answer, click **Call me back**.
   The telephone system monitors the called employee's extension. Your phone will rings when the called employee's other extension returns to the idle state.
3. When your phone rings, click **Answer** to pick up the call and speak with the employee.

Tagging calls with Account Codes

If your system is set up to use Account Codes, you can apply them during a call. Classification Codes are a type of Account Code, but differ in that you can apply them during or after a call. Classification Codes can only to be applied to ACD calls. If you are set up to use Account Codes, you are not necessarily also set up to use Classification Codes.

To tag an in-progress call with an Account Code or a Classification Code

- Click the down arrow adjacent to the **Account Code** button and select a traditional Account Code or Classification Code

After hanging up, while in Work Timer mode, you can tag calls with Classification Codes

To tag a call, after hanging up, with a Classification Code

1. Click the down arrow adjacent to the **Account Code** button.
2. Select **After Call Classification** and select the appropriate Classification Code from the drop-down list.

CONTROLLING YOUR AVAILABILITY

You can log yourself on or off, cancel Work Timer, cancel Reseize Timer, and place yourself in or remove yourself from Make Busy with reason or Do Not Disturb with reason using the soft phone.

To log on to the ACD

- Click **Actions=>Log on** and select an agent ID.

To log off of the ACD

- Click **Actions=>Log off**.

To set Make Busy with reason

- Click **Actions=>Set Make Busy** and select a Make Busy Reason Code.

To remove Make Busy with reason

- Click **Actions=>Remove Make Busy**.

To set Do Not Disturb with reason

- Click **Actions=>Set Do Not Disturb** and select a Do Not Disturb Reason Code.

To remove Do Not Disturb

- Click **Actions=>Remove Do Not Disturb**.

To cancel Work Timer

- Click **Actions=>Cancel Work Timer**.

To cancel Reseize Timer

- Click **Actions=>Cancel Reseize Timer**.

MAKING AND HANDLING CALLS USING CONTACT CENTER CLIENT

You can open an agent, employee or extension monitor, or the Queue Now monitor and either right-click an agent and select telephony functions or access telephony functions by selecting an agent and accessing the options in the Contact Center Client ribbon. For example, when you are on a call you can consult with an idle employee by right-clicking the employee's cell and clicking Transfer/Conference, or by sending the employee an instant message. (See Figure 61.)
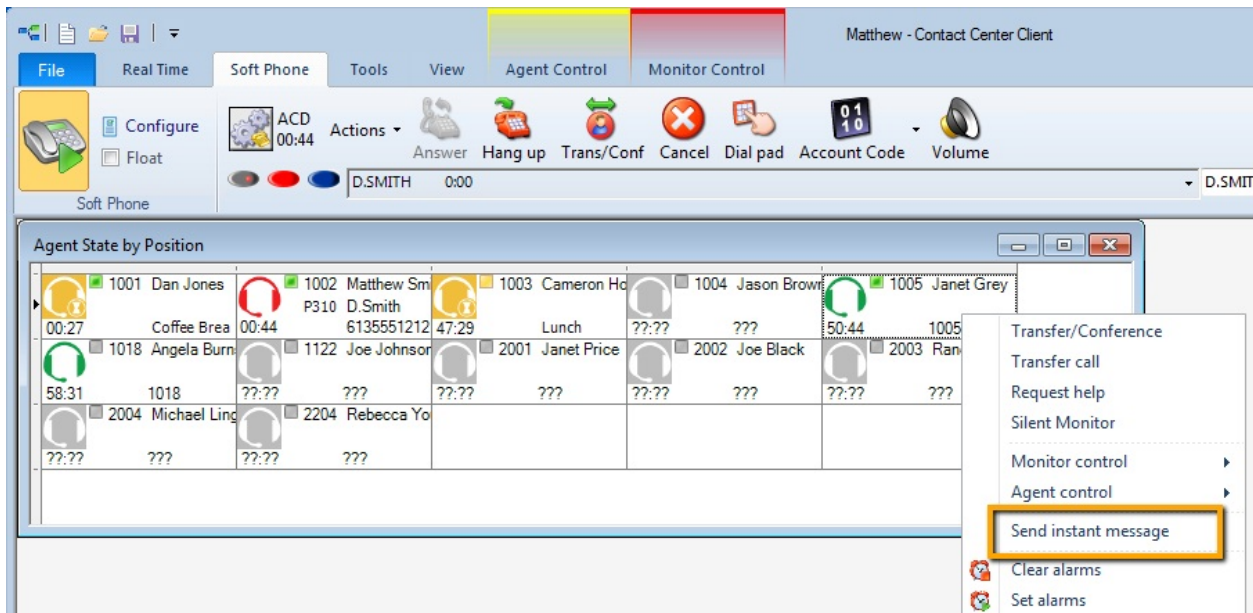
Figure 61: Consulting with a person while on call

Making calls

To call an agent using Contact Center Client

- Right-click the cell of an idle agent and click **Call**.

Alternatively:

1. Select an idle agent in an open monitor.
2. Click the **Softphone** button under the **Agent Control** tab in the Contact Center Client **Real Time** ribbon.
3. Choose the **Call** menu item.

Forwarding calls

If a call is ringing on your extension, to forward the call using Contact Center Client

- Right-click the cell of an idle agent and click **Forward**.

Answering calls

If a call is ringing on another agent's extension, to pick up the call using Contact Center Client

- Right-click the cell of the agent and click **Pick up**.

Adding call notes

When agents are speaking with customers, they can add notes to calls to share with other contact center employees involved in the call. This ensures agents and supervisors have context on calls and know what information has been provided to customers upon call transfer. If the call is transferred, call notes are preserved. Call notes are not preserved when calls are parked. See "Adding call notes to a call" on page 195.

NOTE:

- Before adding call notes, ensure the 'Display call notes' option is enabled in the Softphone configuration window. This option is disabled by default.
- Call notes are supported for inbound calls only.

To add a call note

1. As a call is ringing on your extension, on the soft phone display click **Answer** to answer the call.
   Contact Center Client appears on top of all open applications and displays the Call Notes monitor.

2. After **Enter a new call note**, type a note.
   Call notes can include a maximum of 100 characters.

3. Click **Add**.
   The call note is added to the Call notes text box and is included in the soft phone display upon call transfer.

Recording calls

There are occasions when a user wants to temporarily stop recording a call for confidentiality reasons, or, if the call is not currently being recorded, the user may want to start recording if the interaction becomes hostile or sensitive in nature and a call record may be required. On the Agent State by Time, Agent State by Position, Agent State by Queue by Time, and Extension Now monitors, the Call recording option enables you to start, stop, and restart call recording at any time during a call, using MiVoice Call Recording functionality. Requirements for this on-demand call recording feature are Contact Center PhoneSet Manager or Contact Center Softphone, and the MiVoice Call Recording Connector.

To record a call

- Right-click the associated cell of an agent or extension and select **Call Recording=>Start Recording**.

To stop recording a call

- To stop recording, right-click the cell and select **Call Recording=>Stop Recording**.

Alternatively:

1. Select the cell of an agent or extension in a monitor whose call you want to record.

2. In the Contact Center Client **Real Time** ribbon, under the **Agent Control** tab, select **Start Recording** from the drop-down list in the **Call Recording** column.

3. To stop recording, select **Stop Recording** from the drop-down list in the **Call Recording** column.
   See Figure 62.
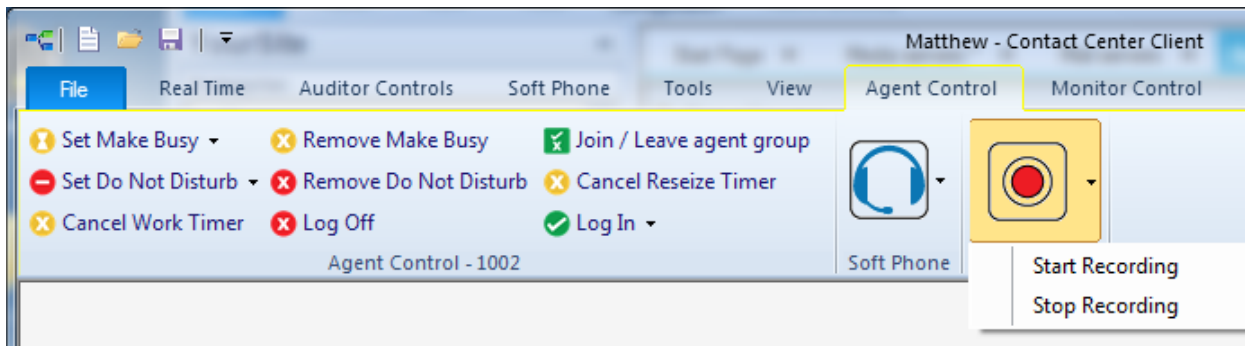
Figure 62: Call recording

Silent monitoring calls

Silent monitoring is the process of listening to the voice interactions of internal or external calls between agents or extensions and callers. Silent monitoring enables you to track call handling techniques and determine where improvements can be made in individual performance. If required, supervisors can conference into the call they are silently monitoring to talk to the customer. For more information, see "Conferencing calls" on page 196 for Contact Center Softphone or see "Conferencing calls" on page 203 for Contact Center PhoneSet Manager.

Silent monitoring is a MiVoice Business feature leveraged by MiContact Center Business. With MiVoice Business 7.0+, supervisors can select an agent or extension for silent monitoring at any time, but the monitoring does not begin until the agent or extension answers or makes a call. The monitoring is maintained so long as the agent or extension remains on the call. The supervisor hears everything the agent hears during the course of the call, including conferences and voicemail. If the agent moves to a call on another line, silent monitoring will follow the agent over to that line. Up to six supervisors can silently monitor an agent or extension. MiVoice Business 7.0+ also enables supervisors to coach agents on call. For more information, see "Coaching agents and extensions on a call with customers" on page 210.

Silent Monitor can be accessed through Contact Center Client or, if programmed on your 3300 media server, through entering a Feature Access Code (FAC) on your phone or in MiCollab Client. For more information about silent monitor and its features and enhancements, consult your Mitel MiVoice Business documentation.

NOTE:

- The monitoring extension and the extension being monitored must coexist on the same telephone system.
- The monitoring extension must be permitted by security role to interactively control other agents.
- The monitoring extension's soft phone toolbar must be open.

The following procedures explain how to

- Silently monitor a call using Contact Center Client
- Silently monitor a call using Contact Center Client and a Feature Access Code

The following procedures take place in an open real-time agent or extension monitor

To silently monitor a call using Contact Center Client

- Right-click the cell of an agent or extension and select **Silent Monitor**.

Alternatively:

1. Select the cell of an agent or extension in a monitor whose call you want to silent monitor.
2. In the Contact Center Client **Real Time** ribbon, under the **Agent Control** or **Extension Control** tab, click the **Softphone** button and click **Silent Monitor**.
   NOTE: If the telephone system settings are incorrect or the monitoring extension and the extension being monitored are on separate telephone systems, you will be unable to Silent monitor and will instead see 'Not Allowed' when you right-click the cell. If the extension you want to monitor is not currently on a call, you will see 'Waiting' when you right-click the cell.

To silently monitor a call using Contact Center Client and a Feature Access Code

1. In the **dial box**, type the **Feature Access Code** followed by the agent or extension number.
2. Click **Dial**.

Coaching agents and extensions on a call with customers

Supervisors can communicate with agents or extensions they are silently monitoring while they are on a call with a customer through Whisper Coach. Whisper Coach is a feature of silent monitor, enabling supervisors monitoring agents to talk to the agent and coach them through their call, without letting the customer hear what the supervisor is saying. Supervisors can also coach agents who are not actively handling a call. If required, supervisors can conference into an active call while coaching to talk to the customer. For more information, see "Conferencing calls" on page 196 for Contact Center Softphone or see "Conferencing calls" on page 203 for Contact Center PhoneSet Manager.

Once a supervisor starts silent monitoring an agent, they have the option of toggling coaching on and off through their IP hardset or the Contact Center Softphone toolbar. Whisper Coach is not automatically disabled when the agent completes the call or switches to a different call. If the supervisor does not stop coaching, the Whisper Coach feature automatically activates the next time the agent makes or answers a call. Only one supervisor can whisper coach an agent at a time. A supervisor can also whisper coach another supervisor, including supervisors actively whisper coaching an agent. If a supervisor whisper coaches another supervisor who is coaching an agent, the supervisor will hear the coached supervisor and the agent, but only the coached supervisor will hear you.

For more information on Whisper Coach, consult your Mitel documentation.

The following procedures explain how to

- Whisper to an agent or extension that you are silent monitoring with Contact Center PhoneSet Manager
- Stop whispering to an agent or extension that you are silent monitoring with Contact Center PhoneSet Manager
- Whisper to an agent or extension that you are silent monitoring with Contact Center Softphone
- Stop whispering to an agent or extension that you are silent monitoring with Contact Center Softphone

To whisper to an agent or extension that you are silent monitoring with Contact Center PhoneSet Manager

- On your hardset, press **Coach On**.

To stop whispering to an agent or extension that you are silent monitoring with Contact Center PhoneSet Manager

- On your hardset, press **Coach Off**.

To whisper to an agent or extension that you are silent monitoring with Contact Center Softphone

- In the **Softphone** toolbar, click **Coach On**.
  See Figure 63.
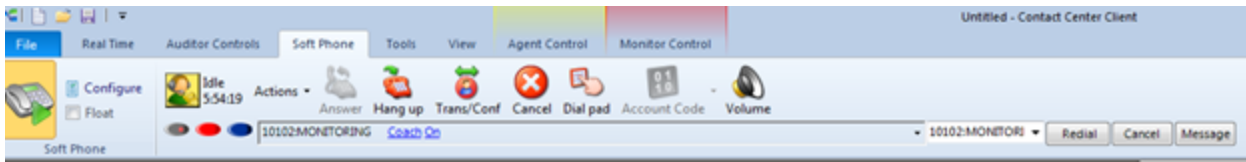
Figure 63: Softphone coach on

To stop whispering to an agent or extension that you are silent monitoring with Contact Center Softphone

- In the **Softphone** toolbar, click **Coach Off**.

Transferring calls

To perform a blind transfer using Contact Center Client

- While on a call, right-click the cell of an idle agent and click **Transfer call**.

Alternatively:

1. Select the cell of an idle agent in a monitor.
2. In the Contact Center Client **Real Time** ribbon, under the **Agent Control** tab, click the **Softphone** button and click **Transfer call**.

Consulting with employees while on calls

To consult with an employee while on a call using Contact Center Client

1. Right-click the cell of an idle agent and click **Transfer/Conference**.
   The system places the initial party on hold.
2. In the dial box, type an extension or phone number. Otherwise, click the down arrow adjacent to the Transfer/Conference button and select a contact.
3. Click **Dial**.
4. After you consult with the employee, either click **Conference** to conference in that person, click **Transfer** to transfer the call to the employee, click **Swap** to talk to the other party, or click **Cancel** to end the consultation call.

Requesting help while on calls

To request help while on a call using Contact Center Client

- Right-click the cell of an idle agent and click **Request help**.
  The system calls the employee. The employee can click Answer in the soft phone and listen
  in on the call without the caller knowing. The employee can click Conference in the soft phone
  to join the interaction at any time.

Chapter 10

MiCOLLAB CLIENT AND IGNITE INTEGRATION

MiCollab Basic and Ignite integration (DESKTOP)

MiCollab Client and Ignite user interface (DESKTOP)

Handling voice contacts with the MiCollab Client and Ignite integration

MiCOLLAB AND IGNITE INTEGRATION (DESKTOP)

MiCOLLAB AND IGNITE INTEGRATION (DESKTOP)

NOTE: The MiCollab and Ignite integration described in this section only applies to Ignite (DESKTOP). Ignite (WEB) integrates with MiCollab for inbound and outbound call handling and supports supervised transfers and conferences from MiCollab Client. Users requiring the full range of MiCollab and Ignite integration features are recommended to use Desktop Ignite.

Ignite is a flexible, intuitive, and efficient tool for handling email, chat, and SMS interactions and for performing basic call handling. Ignite enables agents to handle multiple interactions simultaneously, see the agent groups of which they are members, receive screen pop notifications of incoming interactions, set Account Codes and Classification Codes, view personal performance statistics and those of the queues and queue groups for which they answer, affect personal state indicators, and be advised of the presence of other agents in their agent group(s).

In this integration, Ignite can be used for basic call handling. (See "Handling calls in Ignite" on page 253.) More sophisticated scenarios, such as supervised transfers and conferencing, require MiCollab Client. For instructions related to the voice handling abilities of the MiCollab Client application, refer to the MiCollab Client documentation available on Mitel Online or via the Webhelp within the MiCollab Client.

The MiCollab Client and Ignite integration offers Enterprise presence (Non ACD) and extended ACD presence indicators, informing co-workers of your real-time availability.

Contact Center Client is used as a supervisory tool in this integration, enabling real-time monitoring and alarming, forecasting, data mining, agent and ACD queue control, abandoned caller callbacks, and efficient call handling by moving items from busy to less active queues.

NOTE: MiCollab cannot initiate Whisper Coach. For this feature supervisors require either PhoneSet Manager, Contact Center Softphone, or a hard set.

This chapter describes voice handling using Ignite and MiCollab Client. For information regarding handling email, chat, SMS, and open media interactions using Ignite, see the *Multimedia Contact Center Installation and Deployment Guide*.

For installation and configuration details, see the *MiContact Center Business Installation and Administration Guide*.

The MiCollab and Ignite integration described in this section only applies to Ignite (WEB). Ignite (WEB) integrates with MiCollab for inbound and outbound call handling and supports supervised transfers and conferences from MiCollab Client.

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In this integration, Ignite can be used for basic call handling. (See "Handling calls in Ignite" on page 253.) More sophisticated scenarios, such as supervised transfers and conferencing, require MiCollab Client. For instructions related to the voice handling abilities of the MiCollab Client application, refer to the MiCollab Client documentation available on Mitel Online or via the Webhelp within the MiCollab Client.

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This chapter describes voice handling using Ignite and MiCollab Client. For information regarding handling email, chat, SMS, and open mediainteractions using Ignite, see the *Multimedia Contact Center Installation and Deployment Guide*.

For installation and configuration details, see the *MiContact Center Business Installation and Administration Guide*.

MiCOLLAB BASIC AND IGNITE INTEGRATION (DESKTOP)

There are some features described in this chapter that do not apply for customers running the MiCollab Basic application. Refer to the following list of exceptions:

- Agents must use their deskphone for hot desking and cannot hot desk log in from MiCollab Client.
- Instant messaging is not supported.
- Extended ACD presence is not supported.

MiCOLLAB CLIENT AND IGNITE USER INTERFACE (DESKTOP)

Ignite, when started, automatically docks to the MiCollab Client application, creating one client interface for voice and multimedia. See (Figure 64.)
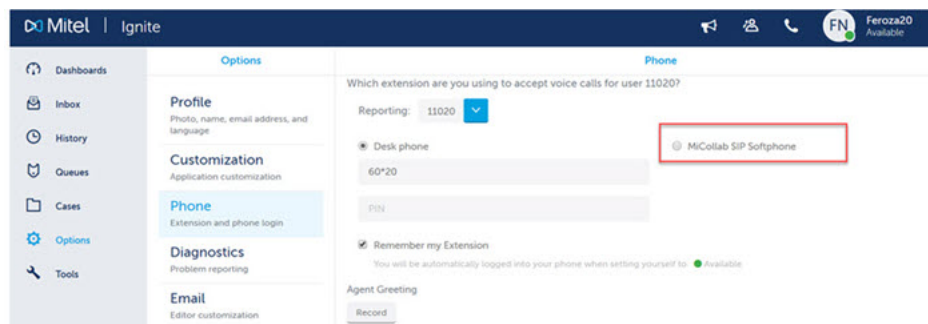
Figure 64: MiCollab Client and Ignite integration

The MiCollab Client and Ignite integration offers you the flexibility to access as much or as little of the interface as needed in order to optimize desktop real estate.

For example, you can choose to collapse the main Ignite window and only access the Ignite Sidebar and MiCollab Client (recommended for voice-only agents) or expand the Ignite panes if you will also handle non-voice media. If you are transferring a call, it is beneficial to check recipient agent availability before transferring. (See Figure 65.)

Given enough space on the screen, MiCollab Client automatically docks to the right of the Ignite window. If there is not enough space to the right, MiCollab Client docks to the left of the Ignite window. If the agent repositions the MiCollab Client on the desktop, Ignite will automatically re-dock to MiCollab Client in its new position.

You can minimize and restore the MiCollab Client and Ignite applications independently or together. When both windows are full size, you can minimize the individual application. When the Ignite window is collapsed, minimizing the MiCollab Client window also minimizes Ignite.
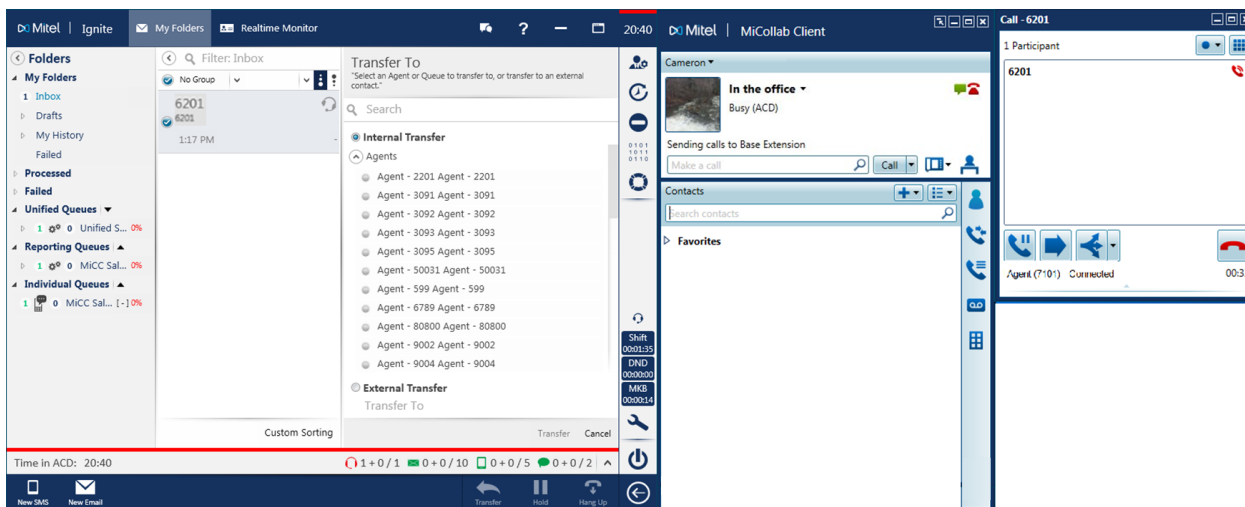
Figure 65: Accessing agent availability in the Ignite Transfer window when transferring a call

HANDLING VOICE INTERACTIONS WITH THE MiCOLLAB CLIENT AND IGNITE INTEGRATION

The following table lists agent actions and the application in which they are performed.

Table 20:   Agent actions by application

AGENT ACTION	MiCOLLAB CLIENT	IGNITE (DESKTOP)	IGNITE (WEB)
Voice ACD log on and log off	✓	✓	✓
Set or remove Make Busy with Reason Code		✓	✓

Table 20:   Agent actions by application (continued)

AGENT ACTION	MiCOLLAB CLIENT	IGNITE (DESKTOP)	IGNITE (WEB)
Set or remove Do Not Disturb with Reason Code		✓	✓
Cancel Work Timer		✓	✓
Chat (IM)	✓		
Join/Leave Agent Group		✓	✓
Answer	✓	✓	✓
Auto Answer *	✓		✓
Hang Up	✓	✓	✓
Conference	✓		✓
Merge			
Cancel	✓		✓
Account Code		✓	✓
Classification Code		✓	✓
Call me back	✓		
Call forwarding	✓		
Camp on	✓		
Forward	✓		
Leave a message	✓		
Mute	✓		
Retrieve	✓		✓
Split	✓		
Silent Monitor	✓		
Transfer (blind)	✓	✓	✓
Transfer (supervised)	✓		✓
Transfer/Conf	✓		✓

Table 20:   Agent actions by application (continued)

AGENT ACTION	MiCOLLAB CLIENT	IGNITE (DESKTOP)	IGNITE (WEB)
Volume	✓		
Dial Pad	✓		✓
Dial Contacts	✓		✓
ACD Hot desk login	x (with MiVoice Business 6.0 SP3+) and with SIP		✓

*For the auto answer feature to work for an agent using a deskphone, the deskphone must have an auto answer key appearance set and auto answer must be enabled in the agent's Class of Service. For an agent using a MiCollab softphone, auto answer must be enabled using the MiTAI browser.

The following features continue to be available in Contact Center Client (Contact Center Softphone or Contact Center PhoneSet Manager) but are not currently supported in the MiCollab Client and Ignite integration:

- Whisper Coach
- Custom ring tones
- Speed Dial
- Call notes
- External Hot Desking Agents

If these features are necessary to your business, you can continue to use Contact Center Softphone or Contact Center PhoneSet Manager but these applications do not support an integration with Ignite.

AGENT STATE INDICATORS

MiCollab Client displays Enterprise presence (Non ACD) and extended ACD presence.

Extended ACD presence displays in MiCollab Client for all agents who are members of the same agent group(s) as the logged in employee. These states are:

- Logged out
- Not available for ACD (not present in any agent groups)
- Available for ACD (logged in and idle)
- Busy <reason> (logged in and busy)
    - Busy – Outbound (making an outbound call)
    - Busy – ACD (receiving an ACD call)
    - Busy <Make Busy reason code name> (in MKB, including system MKB)
    - Busy – Non-ACD (receiving a Non ACD call, such as a consultation call (pre-transfer) or a direct call to their agent DN)
- Do Not Disturb - <DND reason code name> (logged in and in DND)
- Unknown – this indicator may display following an MiContact Center Enterprise Service restart

Agent state indicators enable you to determine agent availability and display in both MiCollab Client and Ignite. When transferring calls, you can check the agent state indicator to see if the receiving agent is available before completing the transfer.

NOTE: Ignite may remove voice agent presence if communication between the MiCollab Client and the MiCollab Client Server is lost. If this occurs, agents must manually reset presence once communication is restored.

Ignite displays the agent's overriding state and the time spent in that state. If the length of time exceeds 24 hours, Ignite displays by days:hours:minutes:seconds. See "Getting started with Ignite (DESKTOP)" on page 222 for an example of the Ignite Sidebar interface.

Agent overriding states, and their associated colors, include:

- Ringing (Red)
- ACD (Red)
- ACD Hold (Red)
- Non-ACD/Outbound (Blue)
- Work Timer (Yellow)
- DND (Red)
- Make Busy (Yellow)
- Not present in any agent group (Yellow)
- Idle (Green)
- Unknown (Gray)
- Logged out (Gray)

MiCOLLAB CLIENT

Voice handling instructions for MiCollab Client are described in the MiCollab Client documentation available on Mitel Online or via the Web help within the MiCollab Client.

Logging into MiCollab Client

If you start Ignite before logging into MiCollab Client, you will be prompted to register and log in your voice agents in MiCollab Client before signing into Ignite. We recommend you start and log into MiCollab Client before starting and logging into Ignite.

To log into MiCollab Client as a Hot Desking Agent

1. Right click on the **Agent** in the **Active Calls** window.
2. Select **Hot-Desk In**.
   A new dialog window opens.
3. In the **Base DN** text box, enter your base extension.
4. If your business uses PINs, enter your PIN.
5. Click **Hot-Desk In**. Your hot desk agent is now logged in and your base extension is out of service.
   NOTE: By default, Ignite is configured to detect voice agent logout. If you are running Ignite and you exit MiCollab Client, your employee and all associated agents are signed out of Ignite.

IGNITE

Ignite is used by agents to handle all types of media, including voice, email, chat, SMS, and open media.

Note: The Desktop Ignite application is not supported on MiCC Business for Open SIP. Agents must use Web Ignite for all agent functionality.

Ignite is available as either a desktop or Web version. They share much of the same functionality but also offer unique agent and supervisor experiences enabling you to choose the application that suits your individual needs. In our documentation, we refer to desktop Ignite and its features as Ignite (DESKTOP) and Web Ignite and its features as Ignite (WEB) or, where appropriate, as DESKTOP or WEB only.

If you want access to the following features, we recommend using Ignite (DESKTOP):

- Fully supported integration with MiCollab Client, including:
  - State indicator collaboration (state changes in either Ignite or MiCollab are reflected in each application)
  - Ability to dock Ignite to MiCollab Client and minimize/maximize both applications simultaneously
  - Auto-logout from MiCollab Client when agent logs out of Ignite

- Recording and implementing pre-announce and agent greetings
- Requesting help from other agents or supervisors while on a call
- Viewing agents' Inbox contents
- Being notified by email of Enterprise Server alarms
- Using the 'Next Longest button' to access longest-waiting Chat and SMS interactions with a single click
- Grouping, sorting, and organizing interactions using the card and grid views

If you want access to the following features, we recommend using Ignite (WEB):

- Accessing Ignite from any supported, Web-enabled device
    - Full support for tablets (Apple, Android, and Microsoft)
    - Partial support for mobile phones (Apple, Android, and Microsoft), including the ability to log in and out, view dashboards, change ACD state, set and remove Make Busy and Do Not Disturb, remove Work Timer, and interact with agent states via dashboards
- Viewing multiple windows simultaneously to enable greater, immediate access to different types of information
- Switching between desktop, tablet, and mobile device, while maintaining consistent access to all relevant information
- Logging into Ignite, without necessarily being available in queues, enabling employees to access Ignite without being presented with ACD calls
- Accessing supervisor-light version of Contact Center Client's Interactive Contact Center capabilities, including interacting with agent states and agent group presence, and moving interactions from queues to agents, based on agent availability and queue activity levels

NOTE: Using MiCollab Client in conjunction with Ignite, to handle voice interactions, but without integration functionality, such as collaborative state updates, docking, minimizing/maximizing together, click to IM other agents and supervisors, and MiCollab Client auto-logout when logging out of Ignite

In this chapter we discuss Ignite as a voice handling system in conjunction with MiCollab Client and, as such, suggest you refer to the *Multimedia Contact Center Installation and Deployment Guide* if you want to access detailed Ignite instructions related to media other than voice.

Getting started with Ignite (DESKTOP)

The Ignite user interface contains a Folders pane, a List pane, and a Preview pane that displays information about an active call. The Status bar displays agent status, and the Action bar and Sidebar contain controls for various call handling operations. See Figure 66.
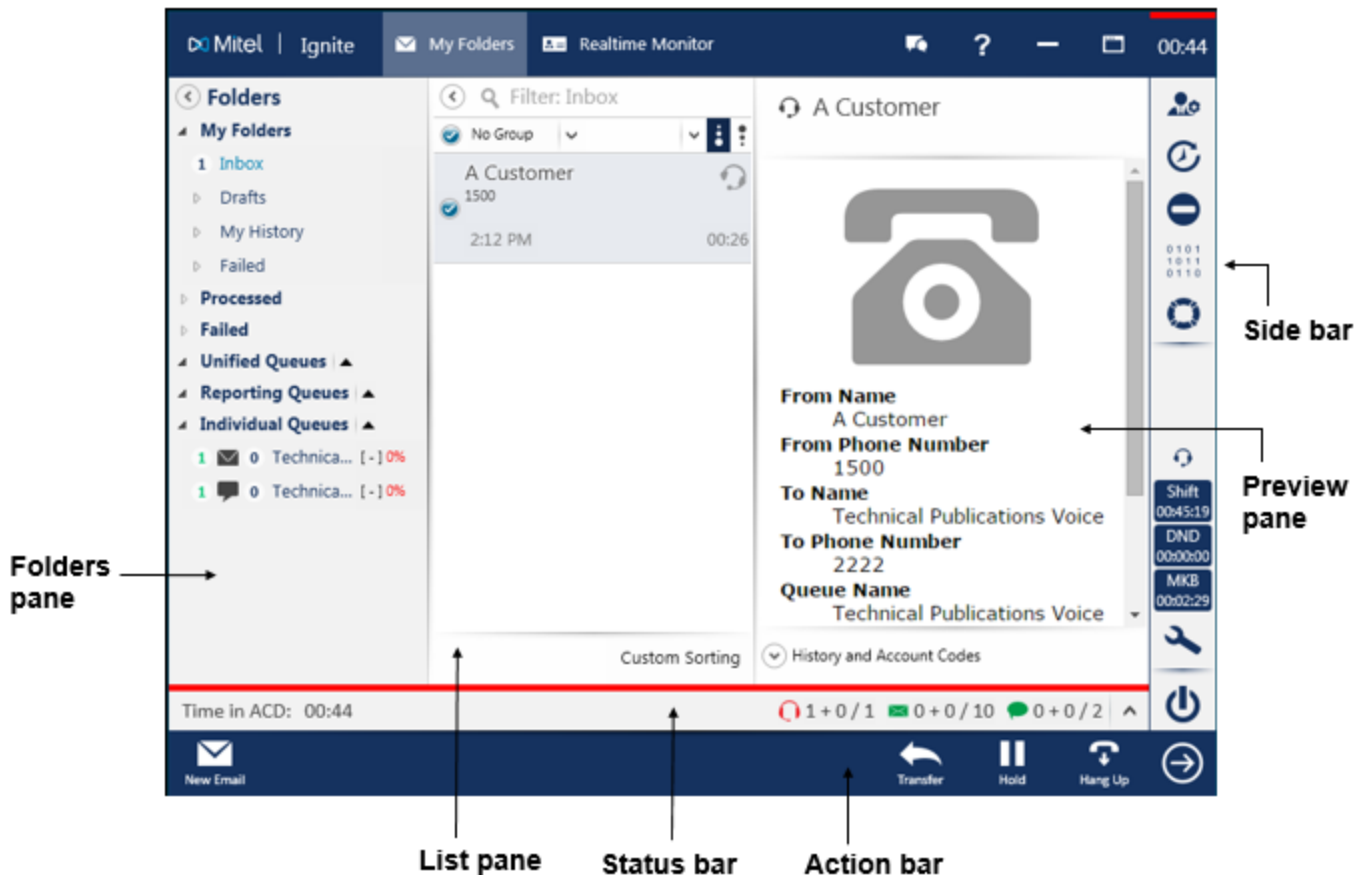
Figure 66: Ignite user interface

You can choose to collapse the main Ignite window and only access the Ignite Sidebar or expand the Ignite panes if you also handle non-voice media. Additional options for personalizing the Ignite interface are available to agents. See "Configuring agent profiles in Ignite (DESKTOP)" on page 226.

The following sections describe how agents can use Ignite to:

- View agent state and statistics
- Access agent handling statistics
- Log in and out
- Configure agent profiles, including recording and managing agent greetings
- View and adjust Agent Group Presence
- Set and remove Make Busy and Do Not Disturb status
- Handle calls and perform in-call actions, such as transferring calls, tagging calls with Account Codes and Classification Codes, and requesting help
- Remove Work Timer (if enabled for the queue)

See "MiCollab Client and Ignite user interface (DESKTOP)" on page 215 for a view of the overall Ignite user interface for voice agents. See Figure 67 for a detailed view of the Ignite Sidebar, where the majority of voice agent actions take place.
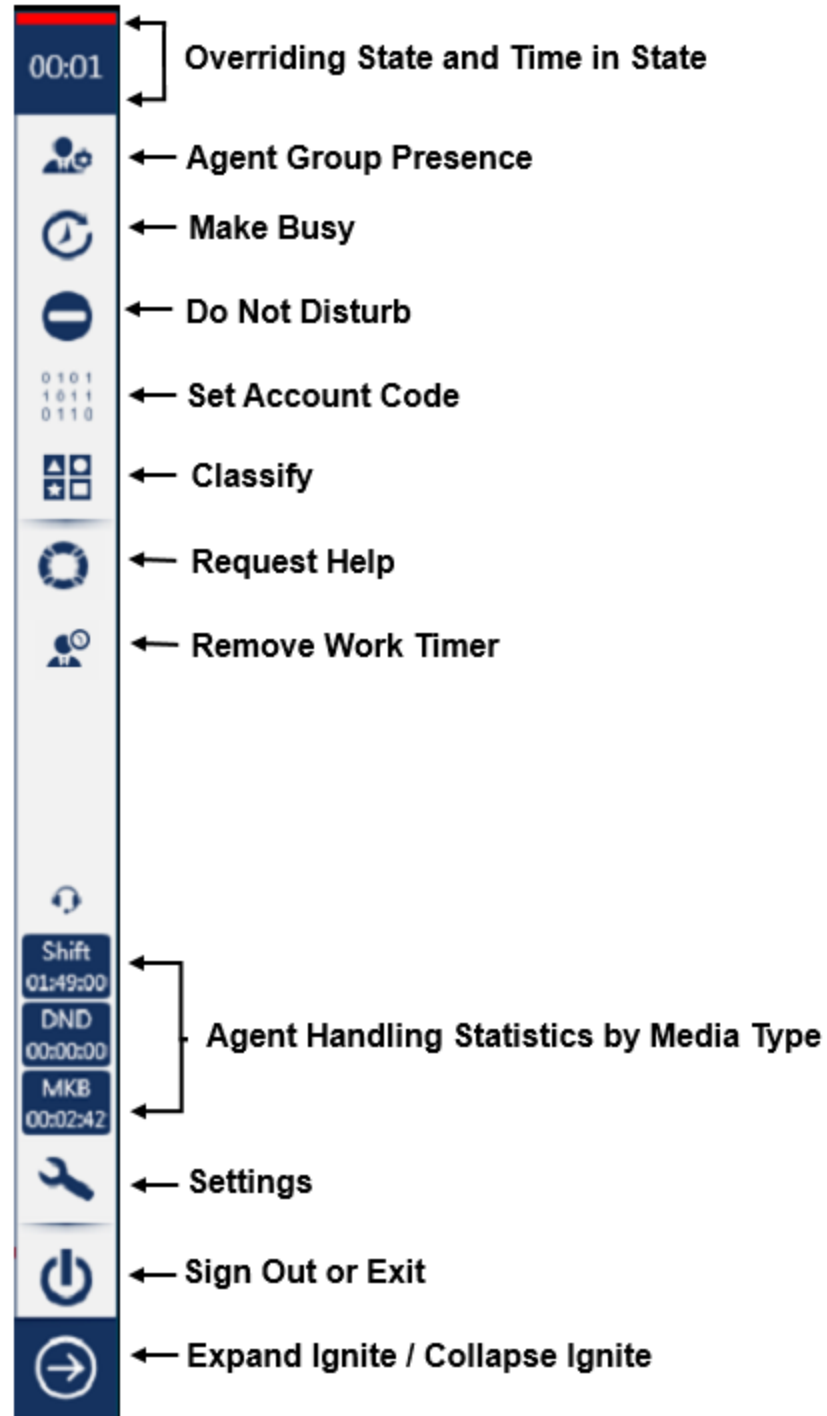
Figure 67: Ignite Sidebar

Viewing agent state and statistics in the Status bar (DESKTOP)

The Status bar displays the employee's overriding state, including:

- **Time in Ringing** – Displays when an employee has interactions ringing in the Inbox
- **Time in ACD** – Displays when an employee has placed ACD interactions in reply mode
- **Time in ACD Hold** – Displays when an employee has placed ACD interactions on hold
- **Time in Non ACD** – Displays when an employee is handling Non ACD interactions
- **Time in Non ACD Hold** – Displays when an employee has placed Non ACD interactions on hold
- **Time in Outbound** – Displays when an employee has placed an outgoing call
- **Time in Work Timer** – Displays after the employee has handled an interaction, provided none of the employee's agents are in an ACD, Non ACD, Outbound, Make Busy, or Do Not Disturb state
- **Time in Do Not Disturb** – Displays when the employee is in a Do Not Disturb state
- **Time in Make Busy** – Displays when an employee is in a Make Busy state
- **Time Logged in Not Present** – Displays when an employee is not present in any of their agent groups
- **Time in Reseize Timer** – Displays when an call fails to route to an employee
- **Time in Idle** – Displays when an employee does not have contacts in the Inbox

An overriding state is a state that supersedes other states. States higher in the list override the states appearing lower in the list. Note that all of the employee's agents are considered when the system calculates overriding state.

The oldest length for a state supersedes other times for the same state if an agent is handling multiple interactions. For example, if an employee had two emails in ACD, the displayed value in the status bar would be the time of the oldest email. When the oldest email is completed, the displayed value in the status bar would switch to the other email's Time in ACD.

You can display agent handling statistics by clicking the ^ button on the right-hand side of the Status bar. Ignite's Status bar also contains statistics on agent performance as it relates to handling multimedia interactions. See the *Multimedia Contact Center Installation and Deployment Guide* for more information.

NOTE: The Status bar is only visible to employees with associated voice, email, chat, SMS, or open media agents.

Accessing agent handling statistics by media type (DESKTOP)

Agents can view statistics related to their performance via the Sidebar. If you are enabled for media types other than voice, you can toggle between media-specific statistics using the icon directly above the statistic display. Select the headphone icon for voice, the envelope icon for email, the interaction icon for chat, or the phone icon for SMS statistics.

By default, the Sidebar displays Shift Time, DND Time, and MKB Time. However, you can select any three agent shift statistics from the Sidebar Stats tab under the Settings menu. See "Sidebar Stats settings (DESKTOP)" on page 227 for more information.

If the statistic name is too long to display in full, you can hover over the statistic and read the tooltip or left-click the statistic to view the full name in the fly-out menu.

Logging into and out of Ignite (DESKTOP)

You can open Ignite from the Windows Start menu, Programs menu, Taskbar, or from a Desktop shortcut.

We recommend that agents using Ignite in conjunction with MiCollab Client log into their voice agent in MiCollab Client before logging into Ignite. If you choose to log into Ignite prior to logging into MiCollab Client, you will be prompted during the Ignite login process to register your voice agent in MiCollab Client.

Depending on administrative settings, agents may find that, after logging into their phone and into Ignite, they are placed in Make Busy across all agent capabilities. After logging into Ignite the agent can remove Make Busy and become available to receive ACD calls.

When you log in to Ignite, you become available to answer interactions for your associated queues and will receive items based on routing rules and your agent workload.

To log into Ignite

1. Start **Ignite**.
2. Enter your **Username** and **Password**.
   NOTE: If your system uses Windows Authentication, you will be logged in automatically.
3. If you want the system to remember your login credentials, click **Remember Me**.
4. Click **Login**.

To log out of Ignite and restart the program to the login screen

- In the **Sidebar**, click the **Sign Out or Exit** button and select **Sign Out**.
  The agent is logged out of Ignite, and Ignite restarts to the login screen.

To log out of Ignite and close the application

- In the **Sidebar**, click the **Sign Out or Exit** button and select **Exit Application**.
  NOTE: You can also close Ignite from the Sign In screen by clicking the **Exit Application** button.

  The agent is logged out of Ignite, and the application closes.

Configuring agent profiles in Ignite (DESKTOP)

When you make manual adjustments to Ignite, the system stores the changes in your profile. When you close Ignite, your profile is automatically saved. When you reopen Ignite with your user name, Ignite loads your most recent profile settings. If Ignite shuts down suddenly, for example, due to a power outage and subsequent computer restart, Ignite uses your last saved profile when restarted.

To reset your profile to the default settings

- Press and hold **Ctrl+R** as you click the **Login** button in Ignite. Continue to hold **Ctrl+R** until you are logged in to Ignite.

In addition to auto-settings, Ignite offers the following configuration options via the Settings button in the Sidebar.

General settings (DESKTOP)

By clicking the Settings button in the Sidebar and then clicking the General settings tab, you can customize Ignite display and behavior.

- **Launch MiCollab Client if installed but not running when signing into Ignite:** This setting is selected by default and automatically opens MiCollab Client, if not currently running, when an agent signs into Ignite.
NOTE: You will be prompted to register and log in your voice agents in MiCollab Client before signing into Ignite.
- **Always show Sidebar:** This setting is checked by default. If unchecked, you will not have access to the options listed below and you will need to use the arrow icon to show or hide the Sidebar.
- **Expand Ignite when a multimedia item is accepted:** This setting is checked by default. When selected, if the main Ignite window is collapsed and an email, chat, SMS, or open media is accepted via the toaster, the main Ignite window automatically expands. If not selected, Ignite will not automatically expand when an email, chat, SMS, or open media is accepted and the agent must expand it manually by clicking the arrow at the bottom of the Sidebar.
- **Expand Ignite when a voice item is accepted:** This setting is not checked by default and if the main Ignite window is collapsed and a call is accepted via the toaster, Ignite does not automatically expand. We recommend deselecting this setting as the main Ignite window is not essential for handling voice interactions. If selected, if the main Ignite window is collapsed and a call is accepted via the toaster, Ignite automatically expands.
- **Collapse Ignite on startup:** This setting is not checked by default. When you start Ignite, the main window will not collapse. If this check box is selected, only the Ignite Sidebar displays at startup. You can use the arrow icon at the bottom of the Sidebar to expand the main Ignite window. If this setting is not selected, when you start Ignite the main window and the Sidebar will display.
- **Collapse Ignite when inbox is emptied:** This setting is not checked by default. When selected, and your inbox empties, the main Ignite window collapses. If not selected, the main Ignite window does not collapse when your inbox has been emptied.

Sidebar Stats settings (DESKTOP)

By clicking the Settings button in the Sidebar and then clicking the Sidebar Stats settings tab, you can select which three agent handling statistics you want to display in the Ignite Sidebar.

You can select which queues are visible by clicking the Settings button in the Sidebar and clicking Queue Selection. You are still offered interactions for the queues to which you are assigned, even though they may not be visible.

Ignite can display a maximum of 64 queues. If your profile is new, from an upgrade, or has been restored from a reset, Ignite automatically loads the maximum number of queues, starting with Unified Queues and then Individual Queues. Queues under Reporting Queues are never loaded by default.

Agent greeting settings

The Agent Greeting feature enables agents to record messages (as .wav files) that play automatically to callers when the agent answers an inbound ACD call. The greeting can provide a consistent experience for each caller and free the agent from having to repeat the same introductory phrase for every call.

Agents can record multiple greeting messages in Ignite and assign them to different queues or use the same recorded greeting on all queues. The agent greeting is a two-way playback, where both the caller and the agent hear the recording.

Agents record and manage their greetings on the Agent Greeting tab on the Settings page.

NOTE:

- When the agent greeting is playing, the caller is able to hear the agent speaking. To prevent the caller from hearing the agent or other contact center background noise during the agent greeting, mute the agent's headset for the duration of the greeting.
- Administrative settings determine whether you have access to Agent greeting functionality. If your contact center is not enabled for agent greetings, the Agent Greeting tab will not display in Ignite.

On the Agent Greeting tab, you can:

- Record greetings
- Assign greetings to specific queues
- Designate a recording as the default greeting
- Play or re-name an existing greeting
- Re-record or delete an existing greeting

Recording agent greetings (DESKTOP)

When you click the Record button to create a recording, the system's Record Agent Greeting workflow is triggered. The Record Agent Greeting workflow instructs the system to call your DN and prompts you to record and save a greeting.

NOTE: When recording messages, your voice agent is in a Non ACD state, and is not offered calls from any incoming queues.

To record your first agent greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Hover over the **Add New Recording** label to make the **Record** button visible on the right-hand side.
3. Click the **Record** button.
4. Enter a name for the recording and click **OK**.
   The Record Agent Greeting workflow is triggered and instructs the system to call your DN.
5. Answer the incoming call and follow the system prompts to record and save your greeting.
   The new greeting displays under the Default Recording heading.

By default, the system selects the first recording as your default recording. The default recording is played on all incoming calls, regardless of the originating queue, unless there is a specific recording assigned to the queue. For more information, see "Assigning a recorded greeting to a queue (DESKTOP)" on page 228.

You can record additional greetings and designate any one of your saved recordings as the default recording, or you can choose not to use a default recording.

To record additional greetings

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Click on the down arrow beside the **Advanced Options** heading to expand the section.
3. Hover over the **Add New Recording** label to make the **Record** button visible on the right-hand side.
4. Click the **Record** button.
5. Enter a name for the recording and click **OK**.
   The Record Agent Greeting workflow is triggered and instructs the system to call your DN.
6. Answer the incoming call and follow the system prompts to record and save your greeting.
   The new recorded message displays under the Recordings heading.
7. Repeat steps 3 to 6 to record additional greetings.

Assigning a recorded greeting to a queue (DESKTOP)

By default, the recording listed under the Default Recording heading on the Agent Greeting tab is played on all incoming calls, regardless of the originating queue. However, you can assign different recordings to different queues if you want to customize your greeting for certain inbound calls.

NOTE: If you do not have a designated default recording, you must assign a recording to each queue explicitly. If there is no default recording, and a queue does not have a recording assigned to it, no greeting is played to customers on incoming calls from that queue.

The Queues section of the Agent Greeting (under Advanced Options) lists all of the queues to which you are assigned. The recorded greeting that plays on incoming calls from a queue is shown to the right of the queue name.

To assign a recording to a queue

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.

2. Click on the down arrow beside the **Advanced Options** heading to expand the **Advanced Options** section.

3. Under the **Queues** heading, select the queue to which you want to assign a recording by selecting the check box beside it.

   - You can search for a specific queue by typing the name in the **Search** box.

   - You can filter the list of queues to show only the queues that do not have the default recording assigned to them by clicking the **Only Show Non-Default** option.

4. Click the **Apply Recording** button.
   The Apply Recording window opens. The selected queue is displayed at the top, and a list of available recordings displays below.

5. Hover over the recording you want to assign to the queue to make the check mark visible on the right-hand side.

6. Click on the check mark to apply the selection.
   The check mark turns green and the new recording displays beside the selected queue in the Queues list on the main Agent Greeting tab.

7. To remove the custom greeting from the queue and revert back to using the default recording, click the **X** button beside the recording you just assigned to the queue.
   The Default Recording label displays beside the queue.

Managing recorded greetings (DESKTOP)

You can review, modify, and delete existing recordings in Ignite. You can:

- Play a greeting
- Re-record a greeting
- Rename a greeting
- Designate a greeting as the default greeting
- Delete a greeting

To play a greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.

2. To select a non-default greeting, click the down arrow beside the **Advanced Options** heading to expand the section.

3. Under the **Recordings** section, hover over the name of the recording in the list to make the row of icons visible on the right-hand side.

4. Click the **Play** button (second icon from the left).
   The system plays the recorded greeting on your PC.

To re-record a greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.

2. Click on the down arrow beside the **Advanced Options** heading to expand the section.

3. Under the **Recordings** section, hover over the name of the recording in the list to make the row of icons visible on the right-hand side.

4. Click the **Record** button.
   The Record Agent Greeting workflow is triggered and instructs the system to call your DN.

5. Answer the incoming call and follow the system prompts to record and save your greeting.
   The changes are saved to your existing recording.

NOTE: You can also re-record the default greeting. Hover over the greeting listed under the **Default Greeting** header and click the **Record** button (as noted above) to re-record the greeting.

To rename a greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.

2. Click on the name of the recording you want to rename (either in the **Default Greeting** section or the **Recordings** section).
   The name field becomes editable.

3. Type the new name of the recording in the name field, then click **Rename**.
   The recording displays in the list with the new name.

To designate a greeting as the default greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.

2. Hover over the name of the recording in the list to make the row of icons visible on the right-hand side.

3. Click the **Pin** button to make the greeting the default greeting.
   The newly-designated greeting displays in the Default Recording section.

4. To clear the default recording designation, hover over the name of the default recording to make the row of icons visible, and click the **Pin** button.
   The greeting is removed from the Default Recording section.

To delete a greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.

2. Hover over the name of the recording in the list to make the row of icons visible on the right-hand side.

3. Click the **Trash** button to delete the greeting.
   The system displays a confirmation dialog.

4. Click **Yes** to confirm that you want to delete the greeting.
   The greeting is removed from the system.

Agent greeting settings (WEB)

The Agent Greeting feature enables agents to record messages (as .wav files) that play automatically to callers when the agent answers an inbound ACD call. The greeting serves to provide a consistent experience for each caller and free the agent from having to repeat the same introductory phrase for every call.

Web Ignite allows the agents to record a single default agent greeting that can be assigned to all queues. The agent greeting is two-way playback, that is both the caller and the agent hear the recording.

Agents record and manage their default greeting on the **Options > Agent Greeting** page.

NOTE:

- When the agent greeting is playing, the caller can hear the agent speaking. To prevent the caller from hearing the agent or other contact center background noise while the agent greeting plays, mute the agent's headset for the duration of the greeting.
- Administrative settings determine whether you have access to Agent Greeting functionality. If your contact center is not enabled for agent greetings, the Agent Greeting options will not display in Ignite.

Recording agent greetings (WEB)

When you click the **Record** button to create a recording, the system's *Record Agent Greeting* workflow is triggered. The Record Agent Greeting workflow instructs the system to call the dialed number and prompts you to record and save a greeting.

NOTE: When recording messages, your voice agent is in a non-ACD state, and is not offered calls from any incoming queues.

To record a greeting :

1. In the **Active Greeting** section, go to **Options** > **Agent Greeting** and click **Record**.
2. Enter a *greeting name* in the **Record Greeting** dialog box that appears.
   Note: Only digits, letters, dash, underscore, space, period, and apostrophe characters are allowed.
3. Click **Ok**. The Record Agent Greeting workflow is triggered and instructs the system to call to the dialed number.
4. Answer the incoming call and follow the system prompts to record and save your greeting. While recording, the Agent Greeting page is disabled and a **RECORDING IN PROGRESS** message and a spinner icon are displayed.
5. After successful recording and saving of the greeting, **DOWNLOAD GREETING** messages appears.
6. After the greeting is downloaded, the Agent Greeting page enables, the downloaded greeting becomes the *Active Greeting* and is loaded in the audio player.

To record additional greetings :

1. If there is no Active Greeting, follow procedure described in the preceding section.

2. If there is an Active Greeting, click **Record**. A dialog will appear asking you whether to record a new greeting or re-record the Active Greeting.

3. If you click **New**, a new greeting is recorded. Follow the procedure described in the section "To record a greeting".

4. If you click **Existing**, the Recording Agent Greeting workflow will be triggered automatically and will use the same greeting name that you have entered for the existing greeting. The rest of the procedure is the same as described in the section "To record a greeting".

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Managing recorded greetings (WEB)

After selecting a greeting, perform the following actions in Web Ignite:

- Play a greeting
- Download a greeting
- Re-record a greeting
- Rename a greeting
- Designate a greeting as the default greeting
- Remove default greeting
- Delete a greeting

To select a greeting

To perform any actions on a greeting, you must select that meeting so that it becomes the Active Greeting.

1. In the **Active Greeting** section, click **Search**. **Search Greeting** dialog box opens.
2. The recent last 10 used greetings are listed under the **Agent Greeting History** section. You can delete any greetings from the history by clicking the **Delete From History** icon
3. You can also search for a specific greeting by typing the name in the **Search** box.
   By default, only the first 15 greetings are displayed.To view additional greeting, click **SEE MORE**.
4. Select the greeting that you want to be an Active Greeting. The selected greeting is now the Active Greeting.

To play a greeting

1. Execute **To Select a greeting**.
   The Active Greeting is automatically loaded in the audio player.
2. Click **Play** in the audio player.

To download a greeting

1. Execute **To Select a greeting**.
   The Active Greeting is automatically loaded in the audio player.
2. Click **Download** in the audio player.

To re-record a greeting

1. See the section *To record additional greetings*.

To rename a greeting

1. Execute **To Select a greeting**.
2. Click **Rename**.
   The Rename Greeting dialog box opens.
3. Enter a name for the greeting and click **Save**.

To delete a greeting

1. Execute **To Select a greeting**.

2. Click **Delete** .
   A confirmation alert is displayed.

3. Click **OK**.

To designate a greeting as the default greeting

1. Execute **To Select a greeting**.

2. Click **Set as default greeting**
   A confirmation alert is displayed.

3. Click **OK**.

To remove default greeting

1. In **Default Greeting** section, click **Clear Default Greeting**
   A confirmation alert is displayed.

2. Click **OK** to confirm removal of the greeting.

Assigning a recorded greeting to a queue (WEB)

By default, the greeting listed under the **Default Greeting** section is played for all the incoming calls. However, you can customize the greetings for inbound calls by assigning different greetings to different queues.

NOTE: If you do not have a designated default greeting, you must assign a greeting to each queue explicitly. If there is no default greeting and a greeting is not assigned to the queue, then no greeting is played to customers for incoming calls for that queue.

The **Configure Queue Greeting** section lists all the queues to which greetings are assigned. The greeting that plays on incoming calls from a queue is shown to the right of the queue name.

NOTE: If there is no greeting assigned to a queue and there is a default greeting, the default greeting will be used and tagged as"(Default Greeting)".

To assign a recording to a queue

1. Select the checkbox beside the queue to assign the greeting.
   By default, only the first 15 queues are displayed. You can view additional queues by clicking the **SEE MORE** link.

   You can also search for a specific queue by typing the name in the Search box.

2. Click **Assign**. The **Search Greeting** dialog opens.

3. By default, the last ten used greetings are listed under the **Agent Greeting History** section. Click **Delete From History** to delete the greetings from the history.

4. You can also search for a specific greeting by typing the name in the Search box. By default, only the first 15 greetings are display. You can see additional greeting by clicking the **SEE MORE** link.

Removing a recorded greeting from a queue (WEB)

1. Select a queue or multiple queues from which you want to remove the assigned greeting.
   NOTE: At least one of the selected queues must have an assigned greeting; otherwise the **Clear Greeting** button remains disabled.

2. Click **Clear Greeting** .

GETTING STARTED WITH IGNITE (WEB)

The following sections provide a walkthrough of Ignite's interface. While this section contains some procedures for viewing and orienting Ignite, agents can access in-depth information on how to use Ignite by following the cross-references throughout.

The following sections describe how agents can use Ignite to:

- View agent state and state statistics
- Access agent handling statistics
- Launch Ignite
- Sign in and sign out
- Reconnect Ignite
- Post feedback and view forums
- Report performance issues
- Configure Ignite dashboards
- Configure agent profiles
- Manage agent group presence and agent status
- Handle calls and perform in-call actions, such as transferring calls, tagging calls with Account Codes and Classification Codes, and requesting help
- Remove Work Timer (if enabled for the queue)

Viewing agent state and state statistics (WEB)

The agent state section of the Avatar displays the employee's overriding state, including:

- **Ringing** – Displays when an employee has interactions ringing in the Inbox
- **ACD** – Displays when an employee is handling ACD interactions
- **ACD Hold** – Displays when an employee has placed ACD interactions on hold or have themselves been placed on hold during an ACD call
- **Non ACD** – Displays when an employee is handling Non ACD interactions
- **Non ACD Hold** – Displays when an employee has placed Non ACD interactions on hold or have themselves been placed on hold during a Non ACD call
- **Outbound** – Displays when an employee has placed an outgoing call
- **Outbound Hold** – Displays when an employee has placed an outgoing call on hold or have themselves been placed on hold during an Outbound call
- **Work Timer** – Displays after an employee has handled an interaction, provided none of an employee's agents are in an ACD, Non ACD, Outbound, Make Busy, or Do Not Disturb state
- **Do Not Disturb** – Displays when the employee is in a Do Not Disturb state
- **Busy** – Displays when an employee is in a Make Busy state
- **Away (Not Present)** – Displays when an employee is not present in any of their agent groups
- **Offline** – Displays when an employee is signed in, but their agents are logged out
- **Reseize Timer** – Displays when a call fails to route to an employee
- **Available** – Displays when an employee does not have inbound interactions in the Inbox

An overriding state is a state that supersedes other states. States higher in the list override the states appearing lower in the list. Note that all an employee's agents are considered when the system calculates the overriding state.

The oldest length for a state supersedes other times for the same state if an agent is handling multiple interactions. For example, if an employee had two emails in ACD, the displayed value in the status bar would be the time of the oldest email. When the oldest email is completed, the displayed value in the status bar would switch to the time of the other email.

Agent states by media are available in the Inbox. For more information, see "Viewing agent handling statistics (WEB)" on page 235.

Viewing agent handling statistics (WEB)

The Inbox contains agent handling statistics for each of the media types the agent handles. Figure 68 displays agent handling statistics across media types.
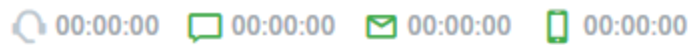
Figure 68: Inbox agent handling statistics (Average Handling Time)

Each media type's icon indicates the corresponding state of the employee's agents. Table 21 outlines the different states.

Table 21:   Agent states

STATE	VOICE	CHAT	EMAIL	SMS	OPEN MEDIA	DESCRIPTION
Ringing						An ACD interaction ringing on an agent, waiting to be handled
ACD						An agent handling an ACD interaction
ACD Hold						An agent who has placed an ACD interaction on hold
Idle						An agent logged on and waiting to receive an interaction
Non ACD		--	--	--	--	An agent involved in an incoming Non ACD interaction or agent originated voice interaction

Table 21: Agent states (continued)

STATE	VOICE	CHAT	EMAIL	SMS	OPEN MEDIA	DESCRIPTION
Non ACD Hold	🎧	--	--	--	--	An agent who has placed a Non ACD voice interaction on hold
Outbound	🎧	--	--	--	--	An agent on an outgoing voice interaction
Outbound Hold	🎧	--	--	--	--	An agent who has placed an outgoing voice interaction on hold
Do Not Disturb	🎧	💬	✉	📱	🔀	An agent who has activated Do Not Disturb and is not available to receive any ACD or Non ACD voice interactions
Make Busy	🎧	💬	✉	📱	🔀	An agent who is not available to receive ACD interactions but can receive transferred interactions and voice interactions dialed directly to the agent
Work Timer	🎧	💬	✉	📱	🔀	An agent who is completing post-contact work, such as paperwork, and is unavailable to receive interactions of that media type
Offline	🎧	💬	✉	📱	🔀	An agent unavailable to handle interactions
Away (Not Present)	🎧	💬	✉	📱	🔀	An agent whose presence is removed from an agent group or media type

The Inbox offers five different types of handling statistics:

- **Workload (current + Work Timer / maximum)** -- Displays active interactions, and any Work Timer states, against the maximum number of interactions an agent can be pushed per media type, as defined by the agent's Workload. Note that Work Timer states count against Workload, and will affect whether agents are pushed interactions.

- **ACD (Count / Duration**) -- Displays the number of ACD interactions the agent has handled for a media type, and the time spent handling interactions of that media type

- **Non-ACD (Count / Duration)** -- Displays the number of Non ACD interactions the agent has handled for a media type, and the time spent handling the interaction

- **Average Handling Time (hours:mins:secs)** – The average time the agent has taken to handle interactions of each media type

- **Unavailable %** -- Displays the percentage of time the agent is unavailable during the shift, including Do Not Disturb, Make Busy, Unknown, and Work Timer states, and when the agent is logged in but not available to receive ACD interactions

By clicking the More button, agents can change the statistics being displayed. (See Figure 69.)
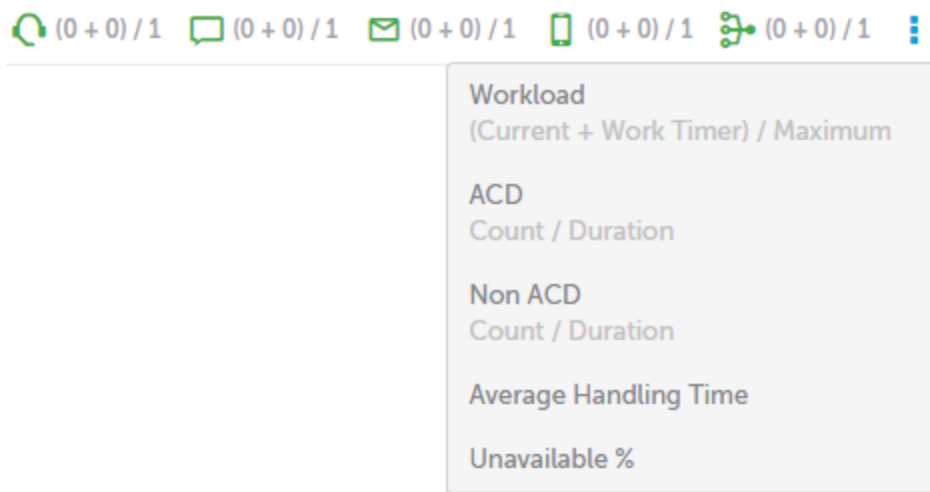
Figure 69: Inbox real-time statistics

Launching Ignite (WEB)

Once Ignite is launched you can sign into the application. See "Signing into and out of Ignite (WEB)" on page 238.

NOTE:

- The intended users of Ignite (WEB) are employees connected either locally on the LAN or to the network via VPN.

- Ignite (WEB) does not support Compatibility Mode.

- Ignite (WEB) requires JavaScript be enabled on your browser. For more information, consult your browser documentation.

- When configuring screen pop notifications to be used with Ignite (WEB), you can execute only web URLs. Direct file execution (for example, .EXE or .BAT files) does not work in Ignite (Web) as the browser considers it as a security risk.

Launch Ignite by typing the following URL into a supported web browser:

- **http://<EnterpriseServerName >/Ignite**
  OR

- **http://<EnterpriseServerIP>/Ignite**
  NOTE: If your system uses SSL, type 'https' in place of 'http' and insert a valid domain or FQDN in place of an IP address.

For a list of supported web browsers, contact your supervisor or system administrator. Ignite supports default browser configuration settings.

NOTE:

- We recommend that you do not use the Ignite (WEB) and Ignite (DESKTOP) applications simultaneously.

- Editing responses across multiple, open browsers simultaneously is not supported.

- If you are drafting an email response and change browsers, hit 'Refresh' to pull down your drafted content.

Signing into and out of Ignite (WEB)

NOTE: After signing into Ignite and becoming Available, you may be placed in Busy across all agent capabilities. This is an administrative configuration. To remove Busy, see "Setting and removing Busy/Make Busy in Ignite" on page 249.

Your default sign-in state is Offline. This means you are signed into Ignite but your ACD agents are logged out. You cannot receive ACD interactions until your state is Available. To change states, see "Adjusting agent states in Ignite (WEB)" on page 249.

If you are enabled for voice, you can set Ignite to log you into your phone. See 'To sign into Ignite and log into the phone', below. Otherwise, we recommend you log into your phone before signing into Ignite so that your agents may become Available.

Logging out of the phone or exiting MiCollab will only log out the voice agent (multimedia agents are not affected). Logging out of Ignite will log out all agents (voice and multimedia) and may requeue items in the Inbox, depending on administrative configurations. To avoid losing work on these items, agents should finish their replies or transfer inbox items to a queue before logging out.

The following procedures explain how to

- Sign into Ignite
- Sign into Ignite and log into the phone
- Sign out of Ignite

To sign into Ignite

1. Launch a supported web browser and type: **http://EnterpriseServerName>/Ignite**.
   OR

   http://<Enterprise Server IP>/Ignite.

   NOTE: If your system uses SSL, type 'https' in place of 'http' and insert a valid domain or FQDN in place of an IP address.

2. Enter your **Username** and **Password**.
   NOTE: If you use Windows Authentication, enter your DOMAIN\Username and your domain password.

3. Click **Sign in**.

To sign into Ignite and log into the phone

NOTE:

- This feature is supported for hot desk and external hot desk agents only

- You can set or change phone settings from Ignite's Options page.

1. Launch a supported web browser and type: **http://EnterpriseServerName>/Ignite**.
   OR

   http://<Enterprise Server IP>/Ignite.

   NOTE: If your system uses SSL, type 'https' in place of 'http'.

2. Enter your **Username** and **Password**.
   NOTE: If you use Windows Authentication, enter your DOMAIN\Username and your domain password.

3. Click **Sign in**.

4. On the **Log in to a phone** dialog window, specify your **Extension** and **PIN** (if applicable).

5. To log into your phone once your sign-in is complete, select the **Automatic login** checkbox and click **Login**.
   NOTE:
   - Clicking 'Save' dismisses the dialog window and signs you in as Offline. However, the phone information is saved to your profile and you are logged into your phone once your state is Available.
   - Clicking 'Cancel' dismisses the dialog window and signs you in as Offline across all media types.

To sign out of Ignite

- Click your avatar and select **State=>Log out**.
  NOTE:
  - Voice agents on active calls are not logged out until the call is complete.
  - Directly closing the browser does not log you out of Ignite (Web); you must manually log out of Ignite (Web).

Reconnecting Ignite (WEB)

If Ignite experiences connectivity issues, a 'Reconnecting' message displays. If Ignite cannot reconnect within the time allotted, a 'Connection lost' dialog pops with the option to Reconnect.

Once the connection is reestablished Ignite refreshes and functionality is restored.

To reconnect Ignite

- Under **Connection lost**, click **Reconnect**.

Posting feedback and viewing our forums (WEB)

Mitel has partnered with UserVoice, a third-party service, to host customer suggestions on https://micontactcenter.uservoice.com. When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Our forums enable you to send feedback directly to the people building the product. While we cannot comment on every suggestion, feedback is analyzed and considered for future releases.

NOTE: Please do not use the forums to submit product defects. To submit product defects, please contact your administrator or dealer.

To post feedback and view our forums

- Click the **Feedback** button
  OR

  Access the following URL: **https://micontactcenter.uservoice.com**.

Your Ignite profile (WEB)

Ignite provides each user with a profile, associated to the username used to log into Ignite. You can adjust several of the profile's default settings to customize your Ignite experience.

Ignite remembers your changes to the following elements:

- History
- Favorited queues
- Dashboard
- Default landing page
- Phone settings, including Extension, PIN, and automatic login to your phone
- Automated diagnostics reporting
- Filter selection preference

You cannot delete your profile; however you can reset the above to Ignite's default settings.

The following procedures explain how to:

- Set an avatar image
- Clear or change your avatar image
- Specify your language preference

- Set Ignite's default landing page
- Configure notification display duration
- Configure phone settings, including Extension, PIN, and automatic log-in to the phone
- Enable automated diagnostics reporting from Ignite
- Reset your profile to Ignite's default settings

To set an avatar image

1. Click **Options=>Profile**.
2. Click **Change Photo**.
3. Under **Upload**, click to upload a photo or drag-and-drop a photo to the space provided.
4. Click **Save**.

To clear or change your avatar image

1. Click **Options=>Profile**.
2. Click **Change Photo** and select **Clear**.
3. To change the image, follow the steps in 'To set an avatar image,' above.

To specify your language preference

1. Click **Options=>Profile**.
2. After **Language**, select a language from the drop-down.
3. Click **Save**.

To set Ignite's default landing page

1. Click **Options=>Customization**.
2. Under **Default landing page**, select a page from the drop-down.
3. Click **Save**.

To configure the notification duration (in seconds)

An agent can configure the durations (in seconds) for the following notifications: new interactions, follow up, and info/error messages displayed on the Ignite screen.

To configure Notification display duration

1. Click **Options=>Customization** to view the options.

2. Under **Notification Settings**, set the **Interaction toaster display time (seconds)** in the range 5 - 60 seconds; default value is 5 seconds.

3. Under **Notification Settings**, set the **Follow up toaster display time (seconds)** in the range 5 - 60 seconds; default value is 10 seconds.

4. Under **Notification Settings**, set the **Info/ error toaster display time (seconds)** in the range 5 - 60 seconds; default value is 5 seconds.

5. Click **Save**.

NOTE: Notification durations can also be reset in Reset Application Options.

To configure phone settings

NOTE: These settings enable login to your phone from Ignite. This feature is supported for hot desk and external hot desk agents only.

1. Click **Options=>Phone**.

2. Specify your **Extension** and, if applicable, **PIN**.

3. To be logged into your phone after making yourself Available, select the **Automatic login** checkbox.

4. Click **Save**.
   The next time you sign into Ignite and set your state to Available, you will be logged into your phone.

To enable automated diagnostics reporting from Ignite

NOTE: You can send on-demand reports in addition to automated reporting. See "Reporting performance issues in Ignite (WEB)" on page 242.

1. Click **Options=>Diagnostics**.

2. Under **Continuously send diagnostics information**, toggle the switch to blue.

To reset your profile to Ignite's default settings

1. Click **Options=>Customization**.

2. Under **Factory reset**, click **Reset Application Options**.

3. When prompted, click **Reset**.

NOTE: Resetting your profile to Ignite's default settings resets the **Clear quick reply templates view after insert** option.

Reporting performance issues in Ignite (WEB)

You can report performance issues in Ignite on-demand, to be reviewed by a supervisor or system administrator. Reports include log lines from your browser and any details you enter.

On-demand reports are sent in addition to Ignite's automated diagnostics reporting. For information on enabling automated diagnostics reporting, see "Your Ignite profile (WEB)" on page 240.

Supervisors looking to access diagnostics reports should consult 'Accessing diagnostics reports sent from Ignite (WEB)' in the *Multimedia Contact Center Installation and Deployment Guide*

To report a performance issue in Ignite

1. Click **Options=>Diagnostics**.
2. In the field provided, describe the issue experienced.
3. Click **Send**.

Configuring Ignite (WEB) dashboards

Real-time monitoring of employees, agents, queues, and callback requests is available via the dashboards in Ignite (WEB). You can create multiple dashboards, customize the widgets that display in each, and give them meaningful names to indicate their purpose.

NOTE: The real-time monitors in Ignite (WEB) are known as 'widgets' in the dashboard user interface.

Adding and configuring dashboards

Upon first use of Ignite (WEB), a default dashboard is created, containing the Employee State widget only. You can rename this dashboard and include additional widgets to display.

Adding and configuring dashboard widgets

The following widgets can be added to dashboards:

- **Employee State**—Displays employee presence and shift information
- **Callback Requests**—Displays a list of callback requests
- **Queue Now**—Displays queue and queue group statistics
- **Agent State**— Displays agents organized by time spent in the following states: ACD, Idle, Non-ACD, Unavailable, Not Present, and Offline
- **Web Browser**— Displays the website content that is embedded in the widget

To add widgets to a dashboard

1. In a dashboard, click **Add Widget**.
2. Select the widget you want to add to the dashboard.
3. Repeat steps 1-2 to select additional widgets if desired.
4. Click **Save**.
5. If you want to add more widgets after saving, select the dashboard to which you want to add widgets and click the **Edit Dashboard** button.

When a dashboard is in edit mode, you can edit the content within widgets, collapse widgets, change the widgets' location on the dashboard, or remove widgets from the dashboard.

NOTE: When you are editing a Web Ignite Dashboard that includes a Web Browser widget you will not see the webpage in the widget while in edit mode.

NOTE: You can collapse or expand the widget at any time (you do not have to be in edit mode).

The following procedure describes the editable features that are common to all widgets.

To modify a widget (common procedures)

1. In the dashboard, click the **Edit Dashboard** button.
2. In the widget toolbar:
   - Click the **Settings** button to edit the content within the widget (see the relevant procedures for each widget for specific details).
   - Click the **Collapse** button to collapse the widget or the **Expand** button to expand the widget.
   - Select the **Move** button to drag and drop the widget to a different position on the dashboard.
   - Click the **Delete** button to remove the widget from the dashboard.
3. If you edited the content within the widget, click **Apply**.
4. Click **Save** to save the changes to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Employee State widget

When you configure options in the Employee State widget, you optionally change the name of the monitor and add an employee to be monitored.

To configure options in the Employee State widget

1. In the dashboard, click the **Edit Dashboard** button.
2. In the Employee State widget, click the **Settings** button.
3. Optionally, under **Title**, type a new name for the monitor.
4. Under **Employees**, either select from the displayed list or type the employee ID in the search field to find the employee you want to monitor.
5. Click **Apply**.
6. Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Callback Requests widget

The only option available to be configured in the Callback Requests widget is the monitor name.

When you configure options in the Callback Requests widget, you can change the name of the monitor and add or remove the device to be monitored.

To rename the Callback Requests widget

1. In the dashboard, click the **Edit Dashboard** button.
2. In the Callback Requests widget, click the **Settings** button.
3. Under **Title**, type a new name for the monitor.
4. Click **Apply**.
5. Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Queue Now widget

When you configure options in the Queue Now widget, you can change the name of the monitor and add or remove the device to be monitored.

To configure options in the Queue Now widget

1. In the dashboard, click the **Edit Dashboard** button.
2. In the Queue Now widget, click the **Settings** button.
3. Optionally, under **Title**, type a new name for the monitor.
4. Click the drop-down beside **Queue** and select either **Queue** or **Queue Group**.
5. Optionally, enter text into the **Search** field to search for queues or queue groups.
6. Select the check box beside each queue or queue group you want to monitor, or select the check box beside **ID** to select all queues or queue groups.
7. Click **Apply**.
8. Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Agent State widget

When you configure options in the Agent State monitor, you can change the name of the monitor and add or remove the device to be monitored.

To configure options in the Agent State widget

1. In the dashboard, click the **Edit Dashboard** button.
2. In the Agent State widget, click the **Settings** button.
3. Optionally, under **Title**, type a new name for the monitor.
4. Optionally, type content into the **Search** text box to filter the agents that display in the list.
5. Select the check box beside each agent you want to monitor, or select the check box beside each media icon to select all agents who are configured to handle that media type.
   NOTE: You can optionally select multiple voice agents for each employee, if applicable, by selecting the check boxes located under the voice (telephone) icon, beside the employee name.
6. Click **Apply**.
7. Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Managing agent group presence and agent status

Agent group presence refers to whether an ACD agent is present in or absent from an agent group.

Agents present in an agent group can receive interactions in the Inbox, pick interaction s out of queue, and be sent interactions from a supervisor. Agents absent from an agent group cannot handle interaction s for the queue.

Agent states refers to an agent's availability to receive ACD interactions. Examples of agent states include Available, Busy/Make Busy and Do Not Disturb. An agent's state determines Ignite handling options available to them.

WEB - An agent in the Offline state is logged into Ignite but their ACD agents are not logged into the system. In this state interactions cannot be handled for the queue.

NOTE: When you configure Agent Group Presence for agents who use an ACD softphone, you must set the default presence to **Absent**. If the presence is set to **Present**, agents will receive ACD calls when they log in to MiCollab, without logging in to Ignite.

Viewing Agent Group Presence in Ignite

Agents can view the agent groups of which they are members. Viewing Agent Group Presence helps agents verify that they are able to handle interactions for the appropriate queues.

Agents can view Agent Group Presence on a group-by-group basis across media types. If administrative configurations permit, agents may also make themselves present in and absent from agent groups and the media types that the group handles.

To view Agent Group Presence (DESKTOP)

- In the **Sidebar**, click the **Agent Group Presence** button.
  Check marks display beside agent groups to which the agent is present. Media types that an agent is present in handle display a blue background. Media types that an agent is not present in handle display a white background.

To view Agent Group Presence (WEB)

- Click your avatar and select **Agent Groups**.
  Media types that an agent is present in handle display in blue. Media types that an agent is not present in handle display in grey.

Adjusting Agent Group Presence in Ignite

If agents have the required permissions, they can make themselves present in, or absent from, agent groups.

Adjusting Agent Group Presence enables agents to make themselves available or unavailable for interactions of different media types. For example, an agent belongs to the Sales (voice and chat) and the Training (email) agent groups. This agent makes herself available to answer only email interactions by becoming absent from the Sales group.

Agents can also make themselves available or unavailable to answer interactions of specific media types. For example, the agent makes herself available to answer only Sales voice interactions by becoming absent from chat in the Sales agent group.

Agents can also make themselves available or unavailable to all agent groups of which they are members, in one action.

DESKTOP - When agents are not present in any of their agent groups, Ignite's Status bar displays a 'Time Logged in Not Present' status. See "Viewing agent state and statistics in the Status bar (DESKTOP)" on page 224 for more information.

WEB - When agents are not present in any of their agent groups, their state becomes Away (Not Present). See "Viewing agent state and state statistics (WEB)" on page 234.

NOTE: Agents may be made automatically present in their agent groups upon logging into Ignite, with multimedia interactions routing as soon as the login is complete. This is an administrative configuration and is not controlled by the agent. However, without this administrative configuration, agents must make themselves present in agent groups in order to be offered interactions.

The following procedures explain how to

- Become present to an agent group
- Become absent from an agent group
- Become either present in or absent from all agent groups
- Become available or unavailable to answer interactions of a specific media type
- Apply default Agent Group Presence settings (DESKTOP)

To become present in an agent group (DESKTOP)

1. In the **Sidebar**, click the **Agent Group Presence** button.
2. Select the group or groups from the **Agent Group Presence** screen and click **Apply**. Multimedia interactions begin routing.

To become present in an agent group (WEB)

1. Click your avatar and select **Agent Groups**.
2. Hover over the agent group's avatar and select **Join <Agent Group name>**.
3. Click **Update**.

To become absent from an agent group (DESKTOP)

1. In the **Sidebar**, click the **Agent Group Presence** button.
2. Deselect the group or groups from the **Agent Group Presence** screen and click **Apply**.

To become absent from an agent group (WEB)

1. Click your avatar and select **Agent Groups**.
2. Hover over the agent group's avatar and select **Leave <Agent Group name>**.
3. Click **Update**.

To become either present in or absent from all agent groups (DESKTOP)

1. In the **Sidebar**, click the **Agent Group Presence** button.
2. To become present to all agent groups, click **Select All**.
3. Click **Apply**.
   You become present in all agent groups and media types within the group.
4. To become absent from all agent groups, click **Clear All**.
5. Click **Apply**.
   You become absent from all agent groups and media types within the group.

To become either present in or absent from all agent groups (WEB)

1. Click your avatar and select **All Agent Groups**.
2. To become present in all agent groups, click **Join All=>Update**.
3. To become absent from all agent groups, click **Leave All=>Update**.

To become available or unavailable to answer interactions of a specific media type (DESKTOP)

1. In the **Sidebar**, click the **Agent Group Presence** button.
2. To become available to answer interactions of a specific media type, click the media icon in the agent group so the icon displays a blue background.
3. To become unavailable to answer interactions of a specific media type, click the media icon in the agent group so the icon displays a white background.
4. Click **Apply**.

To become available or unavailable to answer interactions of a specific media type (WEB)

1. Click your avatar and select **Agent Groups**.
2. To become available to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in blue.
3. To become unavailable to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in grey.
4. Click **Update**.

To apply default agent group presence settings (DESKTOP)

1. On the **Agent Group Presence** screen, click **Defaults**.
2. Click **Apply**.

Adjusting agent states in Ignite (WEB)

Agents can adjust their states to make themselves available or unavailable to receive ACD interactions without logging out of the application.

Agents can set the following states in Ignite:

- **Available**: Agents are logged into Ignite and their ACD agents are available to receive ACD interactions.
- **Offline**: Agents are logged into Ignite and can peruse the interaction repository, but their ACD agents are offline and cannot receive ACD interactions.
  NOTE: Time in Offline does not count towards shift duration.
- **Busy:** See "Setting and removing Busy/Make Busy in Ignite" on page 249.
- **Do Not Disturb:** See "Setting and removing Do Not Disturb in Ignite" on page 252.

Setting and removing Busy/Make Busy in Ignite

When agents must become temporarily unavailable for inbound multimedia interactions, they can put themselves into Busy/Make Busy and choose a code indicating why they are unavailable.

Setting Busy/Make Busy for one agent capability applies a Busy/Make Busy status status to all of the employee's agents. Inbound multimedia interactions are not routed to the agent; however, agents in Busy/Make Busy can receive transferred interactions. While in Busy/Make Busy, voice agents are able to receive Non ACD voice interactions without being removed from Busy/Make Busy and can pick interactions waiting in queue.

Entering Busy/Make Busy while handling interactions ensures that agents are not offered more once finished. However, existing voice, email, chat, SMS, and open media interactions continue until one of the parties ends the interaction.

Agents also enter Reseize Timer when they decline an interaction, fail to answer a ringing interaction within the allotted time, and place an item on hold for longer than is permitted. In each instance, the agent is automatically put into Busy/Make Busy across all media capabilities, and a System Make Busy is registered for the employee. For information on the time allotted to answer a ringing interaction and the duration for which interactions can be on hold, contact your supervisor or system administrator.

The following procedures explain how to

- Set Busy/Make Busy and change Busy/Make Busy codes
- Remove Busy/Make Busy
  NOTE: Agents must remove Busy/Make Busy to become available to receive inbound multimedia interactions and internal voice interactions.
- Change to a Do Not Disturb (DND) state while in Busy/Make Busy

To set Make Busy and change Make Busy codes (DESKTOP)

1. In the **Sidebar**, click the **Make Busy** button.
2. Select a MKB code and click **Apply**.
   NOTE: Agents cannot program MKB codes and can only select from the list provided.
3. To change a Make Busy code assigned to you, follow the above steps.

To set Busy and change Busy codes (WEB)

1. Click your avatar.
2. Under **State**, click **Busy**.
3. Choose a Busy code.

To remove Make Busy (DESKTOP)

- In the **Status** bar, click the **X** button.

To remove Busy (WEB)

1. Click your avatar.
2. Under **State**, click the **X** button next to **Busy**.

To change to a Do Not Disturb state while in Make Busy (DESKTOP)

NOTE: Do Not Disturb and Busy/Make Busy states layer. If an agent in Busy/Make Busy changes their state to Do Not Disturb, the agent will remain in Busy/Make Busy once Do Not Disturb is removed. This prevents agents from receiving interactions when switching states between Busy/Make Busy and Do Not Disturb.

1. In the **Sidebar**, click the **Do Not Disturb** button.
2. Select a DND code and click **Apply**.

NOTE To remove DND and revert to Make Busy, click your avatar, click the **X** button next to **Do Not Disturb**

To change to a Do Not Disturb state while in Make Busy (WEB)

NOTE: Do Not Disturb and Busy/Make Busy states layer. If an agent in Busy/Make Busy changes their state to Do Not Disturb, the agent will remain in Busy/Make Busy once Do Not Disturb is removed. This prevents agents from receiving contacts when switching states between Busy/Make Busy and Do Not Disturb.

1. Click your avatar.
2. Under **State**, click **Do Not Disturb**.
3. Select a Do Not Disturb reason code.
4. To remove DND and revert to Make Busy, click your agent name and click **X** button next to **Do not Disturb**.

Setting and removing Do Not Disturb in Ignite

When agents must become temporarily unavailable for receiving inbound multimedia interactions and internal voice interactions, including transfers, they can put themselves into Do Not Disturb (DND) and choose a code indicating why they are unavailable.

Agents in DND can receive external voice interactions, and existing chat and inbound/internal voice interactions continue until one of the parties ends the interaction.

Setting DND for one agent capability applies a DND status to all of the employee's agents.

The following procedures explain how to

- Set DND and change DND codes
- Remove DND
  NOTE: Agents must remove DND to become available to receive inbound multimedia interactions or internal voice interactions
- Change to a Busy/Make Busy (MKB) state while in DND

To set DND and change DND codes (DESKTOP)

1. In the **Sidebar**, click the **Do Not Disturb** button.
2. Select a DND code and click **Apply**.
   NOTE: Agents cannot program DND codes and can only select from the list provided.
3. To change a DND code, follow the above steps.

To set DND and change DND codes (WEB)

1. Click your avatar.
2. Under **State**, click **Do Not Disturb …**.
3. Choose a DND code.

To remove DND (DESKTOP)

- In the **Status** bar, click the **X** button.

To remove DND (WEB)

1. Click your avatar.
2. Under **State** , click the **X** button next to **Do Not Disturb …**.

To change to a MKB state while in DND (DESKTOP)

NOTE: If an agent changes their DND state to MKB, the agent remains in DND until this state is removed.

1. In the **Sidebar**, click the **Make Busy** button.
2. Select a Make Busy code and click **Apply**.
3. In the **Status** bar, click the **X** button to remove yourself from DND and enter MKB.

To change to a Busy state while in DND (WEB)

NOTE: If an employee applies a MKB state while in DND, the employee remains in DND until the DND state is removed.

1. Click your avatar.

2. Under **State** choose **Busy...**.

3. Choose a Busy code.

4. Click your avatar.

5. Under **State**, click the **X** button next to **Do Not Disturb**.

Handling calls in Ignite

Agents can perform basic call handling in Ignite.

The following sections explain how to

- View call information
- Pick calls out of queue
- Answer and end calls
- Make calls
- Perform in-call actions
- Remove Work Timer
- Handle calls using the Action bar (DESKTOP)
- Handle calls using the Active Call controls (WEB)

MiCollab Client is recommended for performing more advanced call handling functions such as conferencing and supervised transfers.

NOTE:

- DESKTOP - Ignite provides call control for Inbound ACD interactions only. Agents must make outbound calls using Contact Center Softphone, PhoneSet Manager, or a hard set or use Web Ignite.
- Ignite's phone functionality does not support multiple lines.
- Ignite's phone controls are not supported for External Hot Desking Agents.

Viewing call information

You can view basic call information in Ignite before picking a call out of queue or handling it from the Inbox. Note that information displayed may vary based on administrative configuration.

The following explains how to

- View information for calls in queue
- View information for calls in the Inbox

To view information for calls in queue (DESKTOP)

1. In the **Folders** pane, select a queue.

2. In the **List** pane, select a call.
   Call information displays in the Preview pane.

To view information for calls in queue (WEB)

1. Click **Queues** and select the appropriate queue.

2. Select a call from the queue.

To view information for calls in the Inbox (DESKTOP)

1. In the **Folders** pane, click **Inbox**.

2. In the **List** pane, select a call.
   Call information displays in the Preview pane.

To view information for calls in the Inbox (WEB)

- Click **Inbox** and select a call.

Picking calls out of queue

Agents can pick calls out of queue and send them to the Inbox. Once ringing in the Inbox, the call can be answered.

NOTE:

- Agents cannot pick or pick and reply to interactions from the queue if they are in Do Not Disturb.

- Agents may only pick or pick and reply to interactions from the queue if they have the appropriate permissions.

To pick a call from the queue (DESKTOP)

1. From the **Folders** pane, select the queue from which a call will be picked.

2. From the **List pane**, select a call from the queue and, from the **Action** bar, click the **Pick** button.
   The call is transferred to your Inbox.

3. Pick up your desk phone to answer the call.

4. Answer the call using MiCollab Client.

5. To answer the call, select **Inbox** and, in the **List** pane, select the call and click **Reply**.
   NOTE: Additional handling options display in the Action bar. For more information, see the appropriate procedures in this section.

To pick a call from the queue (WEB)

1. Click **Queues** and select the appropriate queue.

2. Select a call from the queue or hover over the item avatar and click **Pick**.
   The call is transferred to your Inbox.

Answering and ending calls

NOTE:

- You cannot explicitly decline a ringing call.

- Agents can request help from other agents, as well as from supervisors. When you answer an incoming request for help, the Ignite toaster displays "Request Help" and the name of the person requesting help. Accepted requests are entered in Silent Monitor mode. Supervisors must use Contact Center Client or their hardset to escalate to Coach mode.

- When supervisor receives an ACD help request and chooses to answer the call through Web Ignite, the call will be directly connected to the agent and the supervisor can coach the agent. Supervisor do not need to specifically press the **Coach** button on the desk phone to coach an agent.

For more information on the Request Help feature, see the appropriate section in this guide.
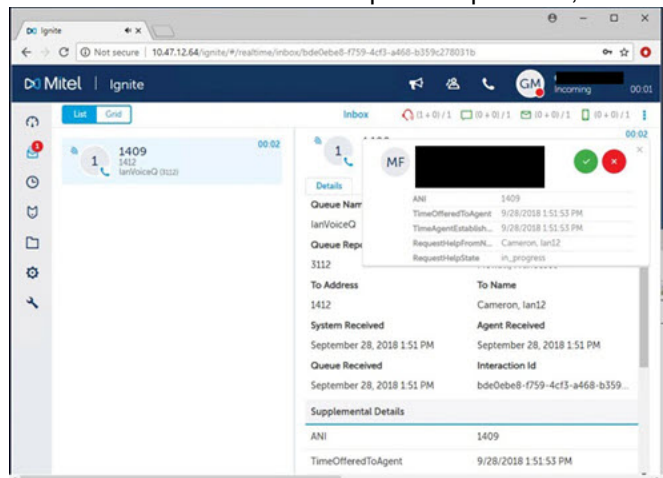
You can answer incoming calls from Ignite. Ignite displays a toaster for each incoming call and allows you to accept the call from the toaster.

When you answer a call, Ignite displays call information.

To answer a call (DESKTOP)

- In the Ignite toaster, click **Accept**, select the call in the **List** pane and, in the **Action** bar, click **Reply**.

To answer a call

- In the Ignite toaster, click **Accept**. Alternatively, select the call or hover over the item avatar and click **Accept**.

You can end calls from Ignite.

To end a call (DESKTOP)

- In the **Action** bar, click **Hang Up**.
  Alternatively, in the **Conversation** window, in the bottom toolbar, click the **Hang Up** button.

To end a call (WEB)

- Click **Inbox** and select a call or hover over the item avatar and click **Hang Up**.

Making calls

DESKTOP - We recommend you use MiCollab Client to make calls, although you can make calls using Contact Center Softphone or Contact Center PhoneSet Manager. This recommendation applies to internal and external destination calls, and calls to dialable queues.

To make a call (WEB)

1. Click **Contacts**.
2. If the destination is not a recent contact, type its name or number in the **Search** field.
   NOTE: You can also create external contacts or import contacts from the Contacts page. For more details, see "Contacts (WEB)" in this document.
3. Hover over the destination's avatar and click **Call**. If applicable, hover over multiple Call avatars to select the appropriate dialable number. For calls to agents, a colored dot on the avatar indicates its availability.
   NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

Optionally, you can also make a call using the New Call button (Phone icon). You can choose the name and number that should be displayed on the external phone when making a call to an external destination.

To specify name and number when making calls

1. Click **New Call**, the **Voice Contacts** page is displayed.
2. Click the **From** button. The **From** page is displayed with all the CLIP (Calling Line Identification Presentation) numbers. The number with a bold font is your reporting number or the line URI.
   NOTE: The outbound CLIP numbers are populated from the DNIS device list in YourSite Explorer.
3. Select the number from the list. The customer sees the selected name and number on their display when they are contacted.

Performing in-call actions

While on active calls you can:

- Put calls on hold and retrieve calls from hold
- Tag calls with Account Codes.
- Tag calls with Classification Codes
- Transfer calls (DESKTOP)
- Initialize Conference calls
- Transition to alternate interaction types
- Merge calls (DESKTOP)
- Contact agents before transferring calls and requesting help

Putting calls on hold and retrieving calls from hold

At times, agents may have to put a call on hold. Ignite displays a paused icon over calls on hold so they can be easily identified.

NOTE: Calls on hold may not be transferred until hold is removed.

The following explains how to

- Put a call on hold
- Retrieve a call from hold

To put a call on hold (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select the active call.
3. In the **Action** bar, click the **Hold** button.

To put a call on hold in the Conversation window (DESKTOP)

- In the **Conversation** window, click **Hold**.

To put a call on hold (WEB)

- Click **Inbox** and select a call, or hover over the item avatar, and click **Hold**.

To put a call on hold (MiCollab Client)

- Click **Inbox** and select a call, or hover over the item avatar, and click **Hold**

To retrieve a call from hold (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List pane**, select the call on hold.
3. In the **Action** bar, click **Remove Hold**.

To retrieve a call from hold in the Conversation window (DESKTOP)

- In the **Conversation** window, click the **Remove Hold** button.

To retrieve a call from hold (WEB)

- Click **Inbox** and select a call or hover over the item avatar and click **Remove Hold**.

Tagging calls with Account Codes

Account Codes identify services, departments, or other elements of the contact center. They are numerical codes with predefined meanings that are used for reporting purposes. You can apply multiple Account Codes during an interaction. The duration of each Account Code is measured from when the Account Code is entered until either the end of the call or the time a new Account Code is entered. Agents tag calls with Account Codes in Ignite to indicate in reports what the interaction segment was about.

For example, an agent handling calls for three catalog companies enters an Account Code of '01' to indicate the customer is inquiring about Company A. Later in the interaction, the agent enters an Account Code of '06' to indicate that the customer is now inquiring about Company A's mail-out services.

Agents can tag calls with multiple Account Codes. Account Codes must be entered during the call and cannot be entered after the call has ended.

NOTE:

- Account Code categories are supported for Ignite (DESKTOP) only. Ignite (WEB) enables agents to filter Account Codes rather than sorting them by categories.

- DESKTOP - Account Codes can also be tagged using the 'History and Account Codes' button found in the Preview pane.

To tag a call with an Account Code (DESKTOP)

1. In the **Sidebar**, click the **Set Account Code** icon to open the **Set Account Code** rolling panel.
   When a call is offered to an agent, the Account Code icon will display in the Ignite Sidebar. You must apply Account Codes during an active call. They cannot be applied after the call is completed.

2. Select the applicable Account Code from the list that displays and click **Apply**.
   NOTE: If you are handling more than one item in the Inbox, for example, one email and one call, and you apply an Account Code, it is applied to the item that is currently selected in the Ignite Inbox.

To tag a call with an Account Code (WEB)

1. Select a call or hover over the item avatar and click **Classify**.

2. Select an Account Code. You can type the name or number of a Code in the **Search** field.
   NOTE: If you enter a number in the search field, you can apply the Code by pressing 'Enter' when prompted.

Tagging calls with Classification Codes

Classification Codes are a type of Account Code but differ in the following ways:

- You can apply multiple Classification Codes, and this can be done at any point during the (call or interaction) or its Work Timer. All Classification Codes applied to a call are pegged with the full call duration, from the time the call arrives until the call ends. This includes transfer time. It also includes Work Timer duration if 'Include queue work timer as part of handling time' is enabled on the queue. If the same code is entered twice, it is not double pegged in reporting statistics.

- Classification Codes can be 'forced', meaning the agent must enter a Classification Code either during the call or when in Work Timer to remain within compliance.

- Account Codes can only be entered during a call, but Classification Codes can be entered during or after a call (while in Work Timer). There are often scenarios within which you set single or multiple Account Codes during a call and then set a Classification Code when the call terminates.

NOTE: Classification Codes are only supported for ACD voice (calls or interactions).

NOTE: During a call, apply Classification Codes as you would Account Codes, using the list of Account Codes in the 'Set Account Code' rolling panel in the Sidebar or in the 'History and Account Code' section of the Preview pane.

To tag a call with a Classification Code after a call ends (DESKTOP)

1. In the **Sidebar**, click the **Classify** button to open the **Classify** rolling panel.
   When the call ends, the Classify button displays (and flashes if forced Classification Codes are enabled) and Work Timer is activated.

2. Select the applicable Classification Code from the list that displays and click **Apply**.
   NOTE: If you are handling more than one item in the Inbox, for example, one email and one call, and you apply a Classification Code during the call, it will be applied to the call regardless of which item is currently selected in the Inbox. If you apply a Classification Code after the call when in Work Timer, the voice interaction stays in your Inbox and you must use the 'Classify' button in the Sidebar to apply a Classification Code to the voice interaction.

3. If Work Timer has not been configured to automatically cancel after entering a Classification Code, cancel Work Timer by clicking the **Remove Work Timer** button in the **Sidebar**.
   NOTE: Forced Classification Codes prevent canceling Work Timer until a Code is entered. Failing to enter a Classification Code before Work Timer expires or is removed by entering Busy/Make Busy or DND can result in a default Classification Code of '-1 Non-Compliant' applied automatically.

To tag a call with a Classification Code after a call ends (WEB)

NOTE: During a call, apply Classification Codes as you would Account Codes, but select 'Classification' in the Classify dialog window.

1. Click **Enter a Classification Code**.

2. Select a Classification Code. You can type the name or number of a Code in the **Search** field.
   NOTE: If you enter a number in the search field, you can apply the Code by pressing 'Enter' when prompted.

Transferring calls (DESKTOP)

You can transfer calls to internal and external destinations. Internal transfer destinations include destinations programmed in the voice media server or in a cluster of voice media servers. External transfer destinations include dialable numbers not programmed in the voice media server or in the cluster of voice media servers. For example, agents in the Support queue receiving calls concerning account renewals can transfer these calls internally to the Sales queue, or agents can transfer calls externally to a supervisor's cell phone.

To receive transfers devices must be enabled to handle the interaction's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred calls, but the call can be transferred to their voicemail. Agents who are either in Busy/Make Busy or at their call Workload limit can receive transferred calls.

Call transfers in Ignite are always blind transfers. In blind transfers, there is no communication with transfer destinations before sending calls. Calls are transferred immediately, and the system does not monitor the outcome.

To perform a supervised transfer, you must use MiCollab Client, Contact Center Softphone, Contact Center PhoneSet Manager or Ignite Web. See "Contact Center PhoneSet Manager and Contact Center Softphone" on page 177 for more information.

NOTE:

- You cannot transfer calls on hold. Hold must be removed before the call can be transferred.
- You may only transfer interactions if you have the appropriate permissions.

The following procedures explain how to

- Blind transfer calls to a voice-enabled employee or queue
- Blind transfer calls to a dialable number
  NOTE: This option is only available with Click to Call. For more information, see "Contacting agents before transferring calls " on page 263.

To blind transfer a call to a voice-enabled employee or queue (DESKTOP)

1. When on a call, in the **Action** bar, click **Transfer**.
2. Select the **Internal Transfer** radio button and select a voice-enabled employee or queue. Expand the device list if necessary. You can search for an internal transfer destination by typing the name of a voice-enabled employee or queue in the 'Search' field.
3. Click **Transfer**.

To blind transfer a call to a dialable number (DESKTOP)

1. When on a call, in the **Action** bar, click **Transfer**.
2. Select the **External Transfer** radio button and, in the **Transfer To:** field, type a dialable number. Enter this number as you would on a phone, including any digits required for outbound dialing.
   NOTE: Invalid entries return an error message. Re-type a valid entry and click 'Transfer'.
3. Click **Transfer**.

Transferring calls (WEB)

You can perform either a blind or a supervised transfer of a voice call from Web Ignite. To perform either type of transfer, you make a consultation call to another party (the available queues, employees, external, or Active Directory contacts) and then decide whether you want to transfer the call immediately (blind transfer) or wait to talk to the other party before you transfer the call (supervised transfer). You can also modify the call to make it a conference while talking to the consultative party.

To perform a blind transfer

1. Click **Inbox** and select a call or hover over the item avatar and click **Accept**.
2. Select the call or hover over the item avatar and click **Transfer**.
   Transfer window lists all the numbers from available queues, employees, external, or Active Directory contacts.
3. To select a contact to transfer the call, hover over the contact. This enables the Blind Transfer and Consultation Call buttons.
4. Hover over the Blind Transfer button to list the dialable numbers associated with the contact.

   - If the contact has only one associated dialable number, you can select the dialable number or click on the transfer button to transfer the call.

- If the contact has more than one dialable number, select a dialable number to transfer the call.

The call is now ringing the other party and you are disconnected. The conversation will stay in your inbox if a Work Timer applies to it.

To perform a supervised transfer

1. Click **Inbox** and select a call or hover over the item avatar and click **Accept**.
2. Select the call or hover over the item avatar and click **Transfer**.
   Transfer window lists all the numbers from available queues, employees, external, or Active Directory contacts.
3. To select a contact to transfer the call, hover over the contact. This enables the Blind Transfer and Consultation Call buttons.
4. Hover over the Consultation Call button to list the dialable numbers associated with the contact.

   - If the contact has only one associated dialable number, you can select the dialable number or click on the Consultation Call button to transfer the call.

   - If the contact has more than one dialable number, select a dialable number to transfer the call.
   The call now is ringing the other party and the caller is placed on hold.

5. Before the other party accepts the transfer, you can do the following:
   - Click **Cancel Transfer** to cancel the call with the other party whom you consulted and connect back to the caller.
   - Click **Complete Transfer** to complete the transfer.

6. After the other party accepts the transfer, you can do one of the following:
   - Click **Cancel Transfer** to cancel the call with the other party whom you consulted and connect back to the caller.
   - Click **Complete Transfer** to complete the transfer.
   - Click **Conference** to connect the three parties together.
   - Click **Swap** to swap the hold. (Applicable to MiVB only).
   - Click **Hold** to put both parties on hold. (Applicable to SIP Only).
   - Click **RemoveHold** to remove hold. (Applicable to SIP Only).
   After you leave the call, the conversation will stay in your inbox if a Work Timer applies to it.

Initialize Conferencing calls

While you are on a call with a customer, you can invite other parties into the call to create a conference. You cannot transfer a call that is in a conference.You can hang up to leave the conference or put the call on hold, muting the person who puts it on hold, and keeps them from hearing the conference. Other parties in the conference can also invite others to the conference.

You can initiate a conference through a supervised transfer. See the "Transfer calls" section for details.

To conference a call (DESKTOP)

1. When on a call, in the **Conversation** window, click the **Invite More People** button
2. Type the name or number of the participant you want to invite.
3. Select a participant and click the **Invite** button.
    The system calls the specified participant. When the participant answers, they are added to the call.
4. To invite additional participants, repeat the above steps.

To create a conference call (WEB)

1. While on a call, click the **Invite** button. The **Invite** window opens.
2. In the **Invite** window, you can search and filter to find the required contacts from the available queues, employees, or external or Active Directory contacts.
3. Click the avatar. You can include up to five parties in a conference call.
    The first agent who answered the call will be in ACD state during the conference and if the call was transferred to another agent, the second agent will be in Non ACD state. You can view all the participants of the conference under the **Participants** list in Ignite.

Requesting help

You can request help from other voice-enabled employees by clicking the Request Help Call Control button in the Sidebar. When you click the button, you can enter either a valid DN in the free form text box or select an employee from a pre-populated list. The system dials the DN, and the employee is added to the call when they accept.

Employees who accept requests for help join the call in Silent Monitor mode and are not audible unless they escalate to Coach or Barge.

Help requests to queues or to external numbers are not supported.

The Request Help button is available as soon as a call is delivered to your Inbox. You can send multiple requests for help during a call, but you can only send one request at a time. Requests sent to employees in unavailable states fail.

The Request Help button is not available when a call is on hold.

To request help on a call (Desktop)

1. In the **Sidebar**, click the **Request Help** button.
   Ignite displays a list of voice-enabled employees and enables you to look up contacts in the Active Directory (AD)

2. In the **Request Help** window, do one of the following:

   - Select a voice-enabled employee from the list

   - In the Search box, enter a voice-enabled employee or AD contact's dialable number

   - In the Search box, enter the name of a voice-enabled employee or AD contact

3. Click **Call**.
   NOTE: You cannot cancel requests in progress. The Request Help button is disabled (turns gray) while the call is being established. Hover over the button with your mouse to view the connection status in a tool tip.

   - If the request is answered within 180 seconds, notification that the request help is established is displayed, and the **Request Help** icon is displayed next to the caller's icon and on the Inbox item. The **Request Help Call Control** button is no longer available until the employee that answered the Request Help call hangs up.

   - If the request is declined or times out, a notification that the request help was declined is displayed. The **Request Help Call Control** button is available, and the employee can make a new Request Help call.

To request help on a call (WEB)

1. Click the **Request Help** icon in the handling icons.
   Ignite displays a list of voice-enabled employees and their ACD status.

2. In the **Request Help** window, do one of the following:

   - Select a voice-enabled employee from the list

   - In the text box, enter a voice-enabled employee's dialable number

   - In the **Search** box, type the name or dialable number of a voice-enabled employee

3. Click **Call**.
   NOTE: You cannot cancel requests in progress.

   - If the request is answered within 180 seconds, a notification that the request help is established is displayed, the **Request Help** icon is displayed next to the caller's icon and on the **Inbox** item. The **Request Help** icon is no longer available till the employee that answered the Request Help call hangs up.

   - If the request for help is not answered within 180 seconds, the request times out and you can make another request for help.

NOTE: The length of time a request help call rings for is defined in the Ignite configuration. By default, duration is set to 180. See the KB article SO3146 in Mitel Knowledge Management System for information on how to change this, and how it interacts with the Agent COS.

Contacting agents before transferring calls

You can choose to instant message (DESKTOP) or call other employees (DESKTOP and WEB) to alert them of an incoming transfer.

DESKTOP - The Click to Call option is not displayed when agents are in Do Not Disturb or absent from their agent groups.

While on a call, initiating Click to Call begins a consultation call with the agent. The original caller is put on hold until the end of the consultation call. When consulting with another agent, if the other agent hangs up first you must click Hang Up in Ignite to reconnect with the original call. If you are using a desk phone, you can hang up your extension and the original call will ring your extension to reconnect.

NOTE:

- If an agent has multiple voice agents, Ignite provides call control for the number associated with the currently active voice agent
- DESKTOP - Click to IM does not support group IM sessions.

To Click to Call or Click to IM (DESKTOP)

1. In the **Transfer** window, select an available agent.
2. Select **Click to IM** to initiate an IM session or select **Click to Call** to initiate a voice call See Figure 70.

    NOTE: The recipient's presence displays, advising of their availability to receive your call or instant message.
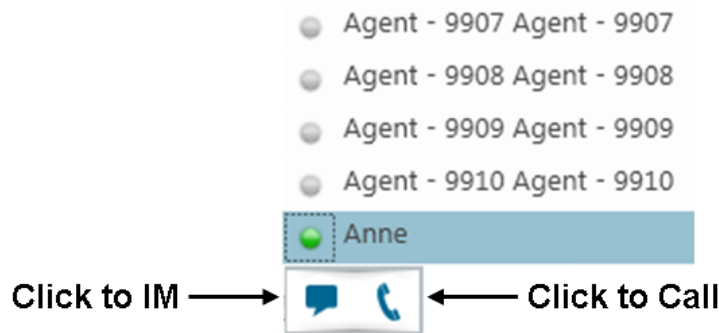
Figure 70: Click to IM and Click to Call

To Click to Call (WEB)

1. Click **Contacts**.
2. If the destination is not a recent contact, type its name or number in the **Search** field.
3. Hover over the destination's avatar and click **Call**.

Removing Work Timer

NOTE: When agents are in Work Timer, Interactions remain in the Inbox until Work Timer is removed

DESKTOP - Interactions in Work Timer are marked with yellow.

WEB - Interactions in Work Timer are marked with yellow and a clock icon.

Agents use the time spent in Work Timer to complete post-interaction work, such as consulting with a supervisor, without having this downtime affect their performance statistics.

When Work Timer is the overriding state in Ignite, agents can remove Work Timer and put themselves back into an overriding state across all media capabilities. Once agents have removed Work Timer, they cannot put themselves back into this state.

According to queue configuration settings, agents can be placed in a Work Timer state for a set period of time after completing a call. The Work Timer can optionally be configured to cancel automatically after a Classification Code has been entered. If the Work Timer is not set to cancel automatically, you must cancel it manually after entering a Classification Code.

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

If Work Timer is not configured to cancel automatically when a Classification Code has been entered and you end the call and do not manually cancel it you will be unable to receive calls until the Work Timer duration, as configured on the queue, has expired.

If you are handling voice and other media interactions simultaneously, one agent being in Work Timer will not prevent you from being offered an interactionof a different media type. For example, if you are in Work Timer after handling a voice call, you may still be offered an email from the email queue, and you can accept it and handle it normally.

To remove Work Timer (DESKTOP)

- In the **Sidebar**, click the **Remove Work Timer** button.
  NOTE: Alternatively, remove Work Timer via the Action bar.

To remove Work Timer (WEB)

- Click **Clear Work Timer**.
  Alternatively, click your avatar, select **State**, and choose an alternate state.

Call handling using the Action bar (DESKTOP)

Agents can optionally perform call handling activities, such as transferring a call, placing a call on hold, and hanging up a call, from the Ignite Action bar instead of using the MiCollab Client call control window. They can also remove Work Timer from the Action bar instead of the Sidebar, which may be preferable for multimedia agents who do not use voice and, as a result, benefit more from the Ignite main window than from the Sidebar. Multimedia agents may choose to collapse the Sidebar and expand Ignite's main window to more efficiently handle emails and chats.

Handling calls using the Active Call window (WEB)

When on a call, agents can use the Active Call window for basic call handling options.

For procedures on specific call handling actions supported in the Active Call window, see the appropriate sections of this guide.

For procedures on using Contacts to reach another person, see the appropriate sections of this guide.

To handle a call using the Active Call window

1. When on a call, click the **Phone** button.
2. Choose a call handling option.
3. To close the Active Call window, click the **Phone** button.

Managing Calls from MiCollab Mobile Softphone in Ignite (WEB)

MiContact Center supports Agent calls on MiCollab Mobile softphone through Web Ignite.

To use the MiCollab Softphone feature, perform these steps:

1. Install MiCollab in your Mobile Phone.
2. Ensure that MiCollab is up and running in your Mobile.
3. Login to WebIgnite, and toggle ON the **Softphone** button.
4. Select the **MiCollab SIP Softphone** radio option.
   Note: If MiCollab is not running in your mobile it will display an error that SIP Softphone is not active.
5. Click **Save**.
   This will change the Presence Status in Web Ignite to Available.
6. You can now dial, receive, end, and transfer both inbound and outbound calls from Web Ignite to your mobile and vice versa.
   Note: Micollab ACD SIP on Mobile does not support resiliency; you must re-toggle the MiCollab agent in the case of a failover.

Chapter 11
FLEXIBLE REPORTING

Using Flexible Reporting

FLEXIBLE REPORTING

Flexible Reporting enables you to create customized reports. Access to Flexible Reporting is determined by your security role.

With Flexible Reporting you can:

- Use a wizard interface to create customized reports with existing statistics (column headings)
- Create custom calculations using expressions
- Select column headings to build custom reports
- Select only the columns you want to view
- Select like data for two or more device types and combine them in one report
- Arrange the columns in the order in which you want to view them
- Customize the names of statistics (column headings) so they are meaningful to your department, business, and industry
- Save the reports in Excel and .pdf formats

NOTE:

- Flexible reporting supports a maximum of 256 columns per report.
- Security role settings are not supported in Flexible Reporting.

USING FLEXIBLE REPORTING

In Flexible Reporting you can

- Create new reports
- Modify standard MiContact Center Business report templates
- Modify existing Flexible Reporting report templates
- Design reports
- Manage your Flexible Reporting reports
- Run reports

STARTING FLEXIBLE REPORTING

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

To start Flexible Reporting

1. Open **Flexible Reporting**.

2. If prompted, type your **Username** and **Password** and verify the **Enterprise Server** IP address.

3. If you use Secure Socket Layer, select **SSL**.

4. Optionally, select **Remember my credentials**.

5. Click **Login**.
   The Welcome to Flexible Reporting dialog box opens.

6. Select from: **Run a report**, **Create a new report**, **Redesign a standard report**, **Modify an existing report**, or **Do not show this dialog box again**.
   NOTE: The Created Language column for existing reports displays your current language preference.

7. If you want to initiate a procedure, click **OK** and see the associated section in this chapter. Otherwise, close the dialog box.

VIEWING THE FLEXIBLE REPORTING USER INTERFACE

The Flexible Reporting user interface includes the following. (See Figure 71.):

- Report Designer wizard
- Layout designer window
- Flexible Reporting button
- Ribbon
- Toolbox window
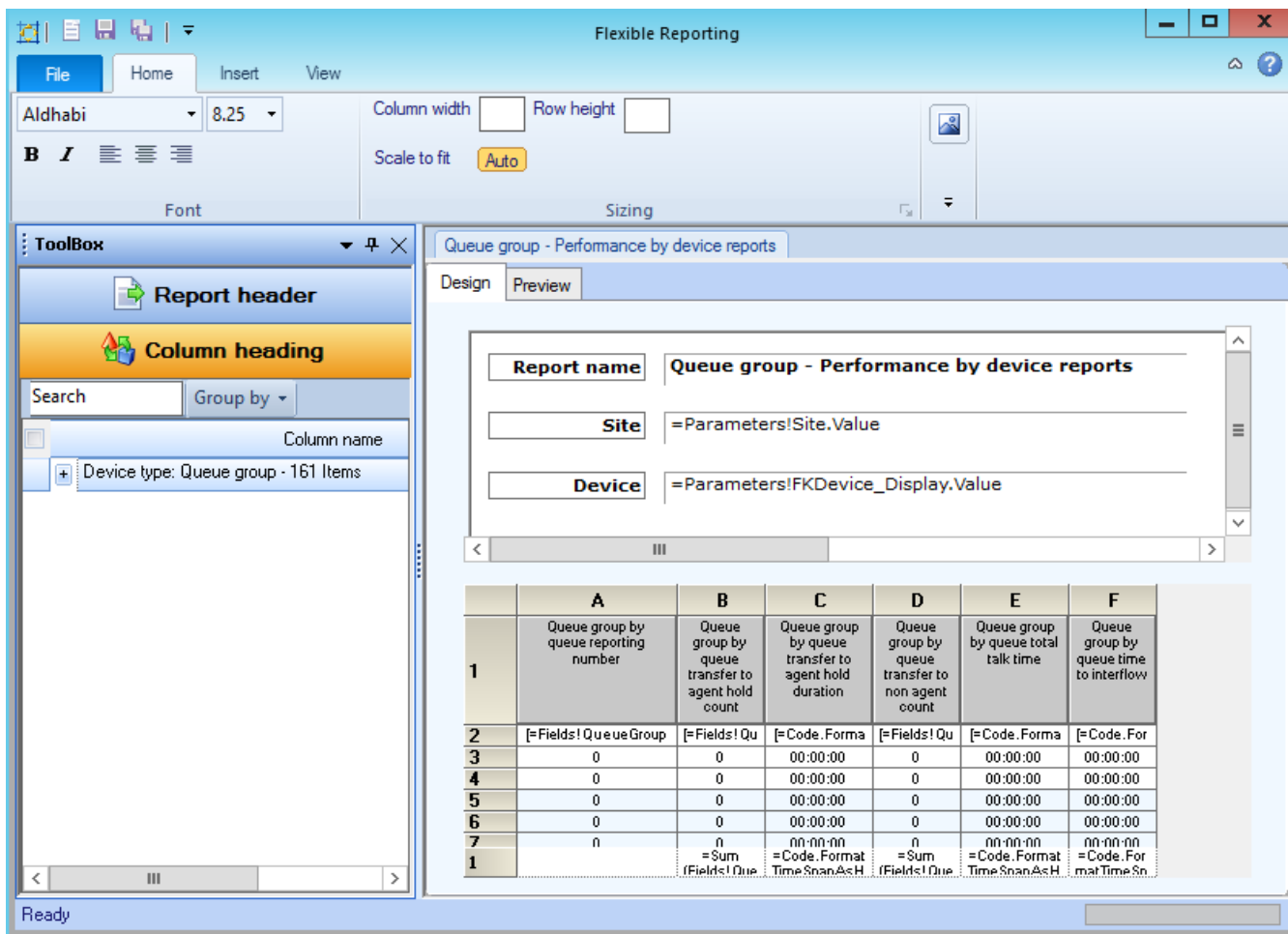
Figure 71: Flexible Reporting user interface

You can customize the position of the windows in the following ways:

- Dock to the left, right, top, or bottom of the user interface
- Float
- Hide
- Auto-hide

Report Designer wizard

Whether you are building a new report or modifying an existing report, the Report Designer wizard leads you through the following steps to select data for the report:

- Create a new report based on an existing one, or design a new report
- Select a report type
- Select the device types
- Select the statistics (column headings), and the order in which you want them displayed
- Specify the time frame options

Layout designer window

The layout designer window comprises two tabs: design and preview. The window displays the report header and data grid. You can perform the following functions in the layout designer window.

On the Design tab you can

- Add images to report headers
- Edit the report header titles
- Adjust the placement of the report header titles and values
- Remove report header titles and values
- Add existing or custom columns
- Move columns
- Delete columns
- Edit column heading names
- Specify column width and row height
- Specify row colors
- Freeze and unfreeze columns
- Save report templates

On the Preview tab you can

- Run and preview reports
- Save reports
- Export reports
- Print reports

The File tab

The File tab is a tab located in the upper left corner of the window. The following options are available from the Flexible Reporting button: New, Open, Save, Save As, Close, Feedback, About, Log Out, Exit, and Exit and Log Out.

Ribbon

The ribbon provides the same functionality as traditional toolbars. Use the tools on the ribbon to help you design your reports. The ribbon comprises the Home, Insert, and View tabs.

On the Home tab of the ribbon, you will find the tools to help you

- Change the font type, size, and style
- Select text justification
- Specify column width, auto-fit column width, and row height
- Change row colors

On the Insert tab of the ribbon, you will find the tools to help you

- Insert and remove images from the report header
- Select the report header titles to open in the report header
- Add existing or custom columns

- Remove columns
- Freeze and unfreeze columns
- View or modify expressions

On the View tab of the ribbon, you will find the tools to help you

- Show and hide the Toolbox window
- Manage reports

Toolbox window

The Toolbox window contains the following:

- **Report header**
  Report header is a list of report header titles that are currently not included in the report header. If the Report Header list is empty, all of the report header titles will be applied to the report. When report header titles are removed from a report they are shown in the Report headers list.
- **Column heading**
  Column heading displays a list of all of the column headings (for only those devices selected for the report) that are not currently included in the report grid. When you add a column heading to the report, it is removed from the list. Similarly, if you remove a column heading from the report, it displays in the Column headings list.

CREATING NEW REPORTS

Using the Report Designer wizard you can build new reports with existing column headings. Use the Report Designer wizard to select the data for the report.

NOTE: Reports generate in the language they were created in, regardless of the current employee language setting.

The Report Designer wizard guides you through the following steps:

- Select how you want to display the report data
- Select the device(s) on which you want to report
- Select the statistics (column headers) that will be shown in the report
- Select the time frames over which you want to run the report

To create a new report

1. Click **File=>New** to launch the Report Designer wizard.
2. Click **Next**.
3. Click **Create a new report** and follow the steps in the wizard.
   At the end of the Report Designer wizard, the new report opens automatically on the Design tab.
4. Design the report.
   See "Designing reports" on page 274.
5. Click **File=>Save.**

MODIFYING STANDARD MiCONTACT CENTER BUSINESS REPORT TEMPLATES

Using the Report Designer wizard you can modify standard MiContact Center Business voice report templates. In the wizard, you can remove data (column headings) and add new data (additional devices and column headings).

You can modify the following standard reports in the Report Designer Wizard:

- Agent by Make Busy Code
- Agent Group by Make Busy Code
- Agent Group Performance by Period
- Agent Performance by Account Code
- Agent Performance by Period
- Agent Shift by Period
- DNIS Group Performance by Period
- DNIS Performance by Period
- Employee Group Performance by Employee
- Employee Performance by Agent ID
- Extension Group Performance by Period
- Extension Performance by Period
- Queue ANI by Area Code
- Queue Group Performance by Period
- Queue Group Performance by Queue
- Queue Performance by Account Code
- Queue Performance by Member
- Queue Performance by Period
- Trunk group Performance by Period

The Report Designer wizard guides you through the following steps:

- Select the report you want to modify from a list of standard MiContact Center Business reports
- Select the time frames over which you want to be able to run the report
  Choosing options on this page enables you to select time frames when submitting or previewing reports. The start and end times enable you to run the report for a specific time frame for each day in the report. For example, you can run the report for your hours of operation only, 8 A.M. to 6 P.M.

  The days of the week time frame enables you to run the report for specific days. For example, every Friday over the last two months.

To modify a standard MiContact Center Business report template

1. Click **File=>New**.
2. Click **Next**.
3. Select the **Redesign a standard report** option and follow the steps in the wizard.
   At the end of the Report Designer wizard, the new report template opens automatically on the Design tab.

   NOTE: On the Select an existing report template page of the wizard, under Filter by device type, select All devices if you want to see all available reports for all devices.
4. Design the report.
   See "Designing reports" on page 274.
5. Click **File=>Save**.

MODIFYING EXISTING FLEXIBLE REPORTING REPORT TEMPLATES

To modify an existing Flexible Reporting report template

1. Click **File=>Open**.
   The Reports List window opens, giving you access to all personal and shared Flexible Reporting reports.
2. Select the report you want to modify.
3. Click **Open**.
   NOTE:
   - If 'Do not show this dialog box again' was selected on the Welcome to Flexible Reporting dialog box, the report will open to whichever tab, Design or Preview, was open last.
   - Shared reports that have no owner will prompt you to optionally take ownership of the report when opened.
4. Modify the report.
   See "Designing reports" on page 274.
5. Click **File=>Save** to save the changes to the report template.
   Click **File=>Save As** to save the report as a new template.
6. If you want to run the report, click the **Preview** tab.

DESIGNING REPORTS

Using the options available on the ribbon, design the report by modifying the report header, columns, and rows.

NOTE:
- You can open and edit report templates you previously created in Flexible Reporting.
- When right-clicking a column to bring up the column's context menu, do not right-click the column header cell. This is an editable field and will not bring up the column context menu.

Adding images to report headers

To add an image to a report header

1. On the **Insert** tab of the ribbon, click the **Insert** button.
2. Select an image file and click **Open**.
   The image displays on the report header.
3. Drag the image to where you want it to be shown on the report header.

Deleting images on report headers

To delete an image

1. Select an image on the report header.
2. On the **Insert** tab of the ribbon, click the **Remove** button.

Editing report header titles

Report headers comprise titles and values. Edit the report header titles to customize the look of your reports.

You can edit the font type, size, and style of report header titles.

You can edit the titles of the following report headers:

- Report
- Site
- Device
- Date range
- Date created
- Created by
  NOTE: You cannot edit the report header values as these are driven by the options selected when the report is submitted.

To edit a report header title

1. Click a report header title.
2. Edit the text in the box.

Moving report header titles and values

You can drag and drop report header titles and values independently.

To move a report header title or value

- Drag and drop the report header title or value to where you want it to be shown on the report header.

Removing report header titles and values

All report header titles and values are shown on a report when it is first created. If you remove a report header title, the corresponding value will also be removed from the header. For example, if you remove the Date range title, the date range will not be shown on the report.

To remove a report header title and value

- On the **Insert** tab of the ribbon, click the **Header** button and deselect the check box of the report header title you want to remove. You can optionally drag and drop the report header title from the report to the Report header list.
  Report header titles removed from the report are shown in the Report header list in the Toolbox window.

Adding report header titles and values

To add a report header title and value to a report

- On the **Insert** tab of the ribbon, click the **Header** button and select the check box of the report header title you want to add. You can optionally drag and drop the report header title from the Report header list to the report.

Adding existing columns

To add an existing column

1. On the **Insert** tab of the ribbon, click **Add=>Existing**.
   Optionally, right-click the report and select Insert column=>Existing from the drop-down list.

   The Add columns window opens.

   NOTE: You can also drag and drop items from the Column heading list in the Toolbox window to add existing columns to your report.

2. Select the columns you want to add to the report.

3. Click **OK**.

Adding custom columns

You can add custom columns to create custom calculations using expressions or blank columns. The ability to create custom calculations using expressions enables you to further customize report data to suit your specific business needs. Blank columns can be used as spacers to make reports easier to read, or as placeholders for importing third-party data after a Flexible Reporting report has been generated.

NOTE:

- Adding columns containing custom calculations requires a thorough understanding of Microsoft Excel and regular expressions.

- We recommend you preview reports containing custom calculations in Flexible Reporting before saving the changes and generating the report in CCMWeb.

To add a column containing custom calculations

1. On the **Insert** tab of the ribbon, click **Add=>Custom**.
   Optionally, right-click the report and select Insert column=>Custom from the drop-down list.

   A blank column displays in the report.

2. Right-click a cell in the blank column and select **Expression**.
   The Edit expression window opens.

   NOTE: You cannot create calculations using expressions in a header cell.

3. Select an option in the **Options** list to view the associated **Item** list.

4. Select an item in the **Item** list to view the associated item **Description** and expression **Example**.

5. Double-click the item in the **Item** list to insert its expression into the **Expression** box.

6. Repeat steps 3 to 5 until the complete calculation is entered in the **Expression** box and click **OK**.
   The expression displays in row two of the blank column in the report.

7. If you want to edit the expression you created, right-click the cell and select **Expression** to return to the Edit expression window.

After adding a column containing custom calculations you can choose to view or modify the expression.

To view or modify an expression

1. Select the cell in the report, for which you want to view or modify the expression.

2. On the **Insert** tab of the ribbon, click **Expression**.
   Optionally, right-click the column and select Expression from the drop-down list.
   The Edit expression window opens.

3. Select an option in the **Options** list to view the associated **Item** list.

4. Select an item in the **Item** list to view the associated item **Description** and **Expression** example.

5. Double-click the item in the **Item** list to insert its expression into the **Expression** box.

6. Repeat steps 3 to 5 until the complete calculation is entered in the **Expression** box and click **OK**.
   The expression displays in row two of the blank column in the report.

You can restrict the number of decimal places that will display for results. As an example, setting the number of decimal places that will display for the Average Manned Agent statistic is described below.

To set the number of decimal places that display for results

1. In the **Design** view, right-click the **Average Manned Agent** column in the report and select **Expression** from the drop-down list.

2. Change the current value of **=Fields!AgentGroupEventAvgMannedAgents.Value to =FormatNumber(Fields!AgentGroupEventAvgMannedAgents.Value,1)**.

3. Click **OK**.

4. Click **Save**.
   The column is formatted to display one decimal place. To alter the number of decimal places displayed, enter the appropriate number in place of **1**.

To add a blank column

1. On the **Insert** tab of the ribbon, click **Add=>Custom**.
   Optionally, right-click the report and select Insert column=>Custom from the drop-down list.
   A blank column displays in the report.

2. Optionally, click the header cell of the blank column and type a name for the column.

Moving columns

To move a column

- On the report grid, drag and drop the column to where you want it on the grid.

Deleting columns

NOTE: Some statistics require specific columns to ensure a report is meaningful. These statistics are associated with the required columns and cannot be deleted on their own. For example, in by period reports, you cannot delete the interval; in by device reports, the reporting number cannot be deleted.

To delete a column

1. Click a column on the report grid.
2. On the **Insert** tab of the ribbon, click the **Remove** button.
   Optionally, right-click the column and select Delete column from the drop-down list.

Editing column heading names

You can edit the names of column headings so they are meaningful to your department, business, and industry. You can change the font type, size, and style as well as edit the text.

To edit a column heading name

1. Click a column heading on the report grid.
2. On the **Home** tab of the ribbon, use the font options to change
   - the font type, size, and style
   - the justification
3. Optionally, edit the name of the column heading.
   If, after renaming a column heading, you want to see the original column heading name, hover over the column heading. The original column heading name displays after Name.

Specifying column width

To specify the column width

1. Click a column.
2. On the **Home** tab of the ribbon, after **Column width**, type the width (in pixels).
   Optionally, right-click the column and select Column width from the drop-down list.

To auto-fit the column width

1. Click a column.
2. On the **Home** tab of the ribbon, after **Scale to fit**, click **Auto**.
   Optionally, right-click the column and select Auto-fit Column width from the drop-down list.

Specifying row height

You can specify a different row height for the header row than the body rows.

To specify the header row height

1. Click the header row.
2. On the **Home** tab of the ribbon, after **Row height**, type the height (in pixels).

To specify the body row height

1. Click a body row.
2. On the **Home** tab of the ribbon, after **Row height**, type the height (in pixels).
   Optionally, right-click the body row and select Row height from the drop-down list.

   All of the body rows will be the same height.

Specifying row colors

You can alternate row colors to make report data easier to read.

1. On the **Home** tab of the ribbon, select the primary and alternate colors.
2. After **Alt row count**, type the number of rows for each color.

Freezing columns

Frozen columns remain stationary when you scroll to view columns to the right.

To freeze a column heading

1. On the report grid, click the column to the right of the ones you want to freeze.
2. On the **Insert** tab of the ribbon, click the **Freeze column** button.
   Optionally, right-click the column and select Freeze column from the drop-down list.

Unfreezing columns

To unfreeze a column heading

1. On the report grid, click the column to the left of the frozen column.
2. On the **Insert** tab of the ribbon, click the **Unfreeze column** button.
   Optionally, right-click the column and select Unfreeze column from the drop-down list.

MANAGING YOUR FLEXIBLE REPORTING REPORTS

You manage your Flexible Reporting reports on the My Reports window. My Reports gives you access to all of the reports you have created.

You can access all the reports you have created and all shared reports created by others, by clicking the File=>Open.

NOTE: Shared reports that have no owner will prompt you to optionally take ownership of the report when opened.

In the My Reports window you can

- Change access properties: Shared or not Shared
- Rename reports
- Delete reports

Changing access properties

To change the access properties of a report

1. On the **View** tab of the ribbon, click **My reports**.
2. Select the report(s).
3. If you want to share the report(s), under **Shared**, select the check box. Otherwise, clear the check box and the report(s) will be available to you only.
4. Click **OK**.

Renaming reports

To rename a report

1. On the **View** tab of the ribbon, click **My reports**.
2. Select a report and click **Rename**.
3. Edit the name.
4. Click **OK**.

Deleting reports

You can only delete the reports you create.

To delete a report

1. On the **View** tab of the ribbon, click **My reports**.
   NOTE: You cannot delete a report that is open in Flexible Reporting.
2. Select the report(s) you want to delete and click **Delete**.
3. Click **Yes** to delete the selected report(s).
4. Click **OK**.

RUNNING FLEXIBLE REPORTS

You can run Flexible Reporting reports in CCMWeb or in Flexible Reporting. However, you can schedule reports in CCMWeb only.

From CCMWeb, you can run Flexible Reporting reports on demand, or schedule them, the same way you run standard reports.

In Flexible Reporting you can run, save, and print reports on the Preview tab. After you run a report, printing options enable you to view the print layout, and configure page setup and printer properties.

NOTE:

- Flexible Reporting will run reports only when there is data to generate the report.
- If you run a report on the Preview tab and the report data is all zeros, ensure you selected a device on which to run the report. If you selected a device, ensure the selected time period is one that would have incurred activity.
- Custom reports created in Flexible Reporting can only be generated in the language that was used when they were created and saved.

Running reports in CCMWeb

To run an on-demand report in CCMWeb

- Hover over **Reporter**, select **Flexible Reporting**, and run the report.
  You will have access to all Flexible Reporting reports created by you and shared Flexible Reporting reports created by others.

NOTE: When a report supports more than one device type, click on each tab to select the devices on which you want to report.

To schedule a report in CCMWeb

1. Hover over **Reporter** and select **Scheduled Reports**.
2. If you want to create a new schedule, click **Next**. Otherwise, select an existing schedule and click **Manage schedule properties**.
3. Configure the schedule properties and distribution attributes.
4. Click **Add a report**.
5. Click **Flexible Reporting** and select a report to add to the schedule.

Running reports in Flexible Reporting

To run reports in Flexible Reporting

1. On the **Preview** tab, under **Devices**, select the device(s).
2. Specify the date and time parameters.
3. Click **Run report**.
   Flexible Reporting generates the report and displays it in the preview pane.

Saving templates and reports

In Flexible Reporting you can save

- **Templates**
  The report templates you create in Flexible Reporting are saved on the Enterprise Server so you can run them from Flexible Reporting and CCMWeb.

  NOTE: Report templates are not saved automatically. You must save your report template before you exit Flexible Reporting if you want to use it to run reports or modify the template later.

- **Reports**
  After you run a report in Flexible Reporting, you can save the output (report) on your computer or elsewhere on your network. Reports can be saved or, optionally, exported in Excel (.xsl and .xslx), Word (.doc), or .pdf formats.

To save a report template as a new document

1. Click the **File=>Save As**.

2. After **File name**, type the name of the new template.
   NOTE: Only you can run and view reports you have created and designated as not shared. Shared reports can be run and viewed by others.

3. If you want to allow others to run the report, select the **Shared** check box.

4. Click **Save**.

To save modifications to a report template

- Click **File=>Save**.

To export a report in Excel (.xsl or .xslx) format

- In the Preview window, above the generated report, click the **Save** button, select **Excel**, and specify the location to save the report in Excel (.xsl) format.
  Optionally, in the **View** tab of the ribbon, click the **Export report** button, select **Excel** (.xsl) or **Excel 2007** (.xslx) and specify the location to save the report in an Excel format.

To export a report in Word (.doc) format

- In the Preview window, above the generated report, click the **Save** button, select **Word**, and specify the location to save the report in Word (.doc) format.

To export a report in .pdf format

- In the Preview window, above the generated report, click the **Save** button, select **PDF**, and specify the location to save the report in .pdf format.
  Optionally, click the **Export report** button on the View tab of the ribbon, and select **PDF**, and specify the location to save the report in .pdf format.

Printing reports

To print a report you ran on the Preview tab

- On the Preview window toolbar, click the **Print** button.

POSTING FEEDBACK AND VIEWING OUR FORUMS

Mitel has partnered with UserVoice, a third-party service, to host customer suggestions on https://micontactcenter.uservoice.com. When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Our forums enable you to send feedback directly to the people building the product. While we cannot comment on every suggestion, feedback is analyzed and considered for future releases.

NOTE: Please do not use the forums to submit product defects. To submit product defects, please contact your administrator or dealer.

Feedback can also be submitted directly to Mitel without posting the suggestion on the forums. For more general feedback, you can also provide a rating of your experience with MiContact Center Business.

NOTE: Please do not use feedback for requesting customer assistance. For assistance with MiContact Center Business, please contact your dealer or Mitel Customer Support.

To post feedback and view our forums

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Got an idea? Tell us**.
   OR

   Access the following URL: **https://micontactcenter.uservoice.com.**

To submit feedback directly

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Contact Us**.

To rate your Mitel experience

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Rate us**.

Chapter 12
WORKFORCE SCHEDULING, SCHEDULE ADHERENCE, AND EMPLOYEE PORTAL

Understanding Workforce Scheduling

Workforce Scheduling and your contact center

Selecting a scheduling method

Schedule setup and customization

Forecasting data for schedules

Schedule creation

Schedule distribution

Schedule Adherence

Employee Portal

WORKFORCE SCHEDULING

Workforce Scheduling is an optional application that enables you to create employee schedules. Using historical data, Workforce Scheduling forecasts the number of employees required to meet your contact center's Service Level objectives.

NOTE: Access to Workforce Scheduling features is dependent on your administrative-set security role.

Using Workforce Scheduling in conjunction with MiContact Center Business, you can

- Customize schedules
- Forecast scheduling requirements
- Match an employee's skills to those skills required for jobs in each schedule
- View the distribution of employees across each schedule
- Print schedule reports

There are two optional applications that work in conjunction with Workforce Scheduling: Schedule Adherence and Employee Portal. For more information on these applications, see "Schedule Adherence" on page 322 and "Employee Portal" on page 329.

UNDERSTANDING WORKFORCE SCHEDULING

Before you start using Workforce Scheduling read the following sections on how to

- View the Workforce Scheduling user interface
- Understand forecasting concepts
- Understand the Workforce Scheduling process

VIEWING THE WORKFORCE SCHEDULING USER INTERFACE

Figure 72 displays scheduling information, such as the employees who are scheduled, employee shift start and end times, the time interval shift totals, and the shift details for each employee.

NOTE: The Scheduling and Forecasting buttons in the Tools>Administration window are used to toggle between these two views.

The Workforce Scheduling user interface is comprised of the following panes:

- People pane
- Time bar pane
- Totals pane
- Schedule details pane
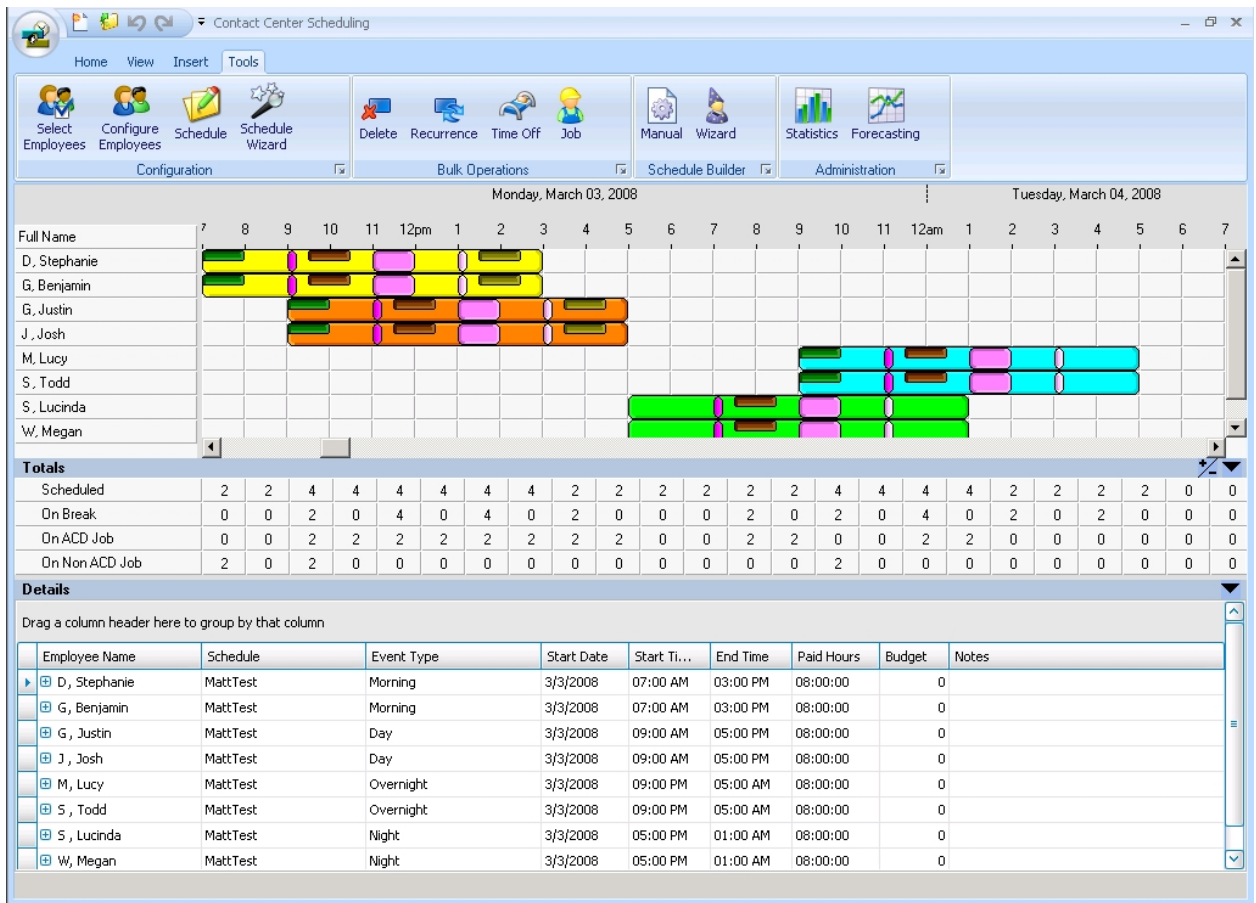
Figure 72: Scheduler window

People pane

The people pane is located in the upper-left portion of the scheduler window. The people pane lists the employees included in the schedules you are viewing. (See Figure 73.)

Figure 73: People pane

Time bar pane

The time bar pane is located in the upper-right portion of the scheduler window. The time bar pane displays a time bar for each scheduled employee. Time bars display the shifts, breaks, jobs, time off, and unavailable periods for employees listed in the people pane. You can view the time bar pane in the following time intervals: 6 hours, 12 hours, 1 day, 2 days, 1 week, 2 weeks, and 1 month. (See Figure 74.)

You can view previous or upcoming dates using the horizontal scroll bar under the time bar pane. If you reach the end of the month and want to view dates for the next month, you can click the arrow on the scroll bar to load the schedule for the next month (as indicated by the red square in the following image).
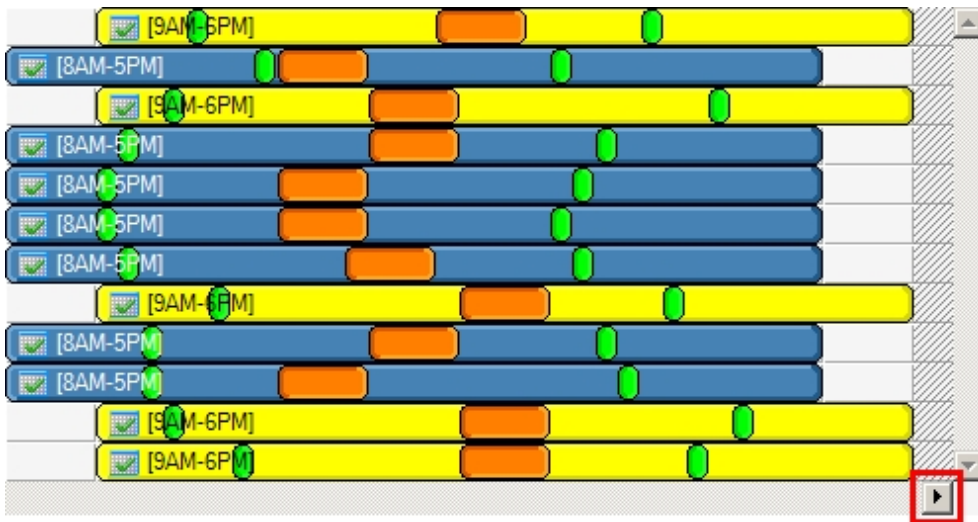
Figure 74: Time bar pane

Totals pane

The totals pane appears when you select event totals to view. The totals pane is located in the center of the scheduler window. Each value represents the total number of employees scheduled for an event. (See Figure 75.)

Totals														
Scheduled	0	0	0	0	0	0	0	0	5	5	5	5	5	4
On Break	0	0	0	0	0	0	0	0	0	0	0	0	0	0
On ACD Job	0	0	0	0	0	0	0	0	0	0	0	0	0	0
On Non ACD Job	0	0	0	0	0	0	0	0	0	0	0	0	0	0
At Work	0	0	0	0	0	0	0	0	5	5	5	5	5	4
Over/Under	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Overtime	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Figure 75: Totals pane

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You can view the following event totals:

Forecasted

The *Forecasted* total displays after you apply a forecast to the schedule. This total represents the forecasted number of employees required to handle interaction requests and meet the Service Level objectives you specify. You can optionally adjust the Forecasted total in the totals pane. See "Modifying forecast totals in the event totals pane" on page 318.

NOTE: When the user sets View to greater than 6 hours, each cell value in the Totals View is the maximum value of the composite 15-minute values. The Over/Under value displayed is also the maximum of the composite values. As a result, in this view, the displayed value for the Over/Under does not align with the value that would be obtained from adding the At Work and forecasted values.

Scheduled

The *Scheduled* total represents the number of employees scheduled for the time you are viewing.

On break

The *On break* total represents the number of employees scheduled for a break at a specific time.

On ACD Job

The *On ACD Job* total represents the number of employees scheduled to perform ACD work.

On Non ACD Job

The *On Non ACD Job* total represents the number of employees scheduled to perform Non ACD work.

At work

The *At work* total represents the number of employees scheduled to handle interaction requests.

Over/Under

The *Over/Under* total represents the difference between the number of employees at work compared to the number of employees forecasted. A value of 4 means 4 additional employees are working compared to the forecasted requirement. A value of (4) means 4 fewer employees are working compared to the forecasted requirement. When you book annual leave for employees, you can preview the result on shift coverage by using the over / under function, before updating changes.

Overtime

The *Overtime* total represents the number of employees scheduled to perform overtime work.

Schedule details pane

The schedule details pane is located at the bottom of the scheduler window. It displays details on scheduled employees. You can modify the start and end times of scheduled events in the schedule details pane. For example, you can adjust the length of a scheduled break. See "Modifying event times and notes in the schedule details pane" on page 318. (See Figure 76.)

Details

Drag a column header here to group by that column

	Employee Name	Schedule	Event Type	Start Date	Start Ti...	End Time	Paid Hours	Budget	Notes
▶	⊞ M, Ghislain	6120 Training	Regular	2/22/2008	08:00 AM	05:00 PM	09:00:00	0	
	⊞ D, Abdallah	6120 Training	Sales	2/22/2008	08:00 AM	04:00 PM	08:00:00	0	
	⊞ G, Dave	6120 Training	Regular	2/22/2008	08:00 AM	05:00 PM	09:00:00	0	
	⊞ A, Awil	6120 Training	Ssupport Weekday	2/22/2008	08:00 AM	10:00 PM	14:00:00	0	
	⊞ M, Trevor		Mat Leave	2/22/2008	08:00 AM	06:00 PM	10:00:00	0	
	⊞ C, Mike	6120 Training	Regular	2/22/2008	08:00 AM	01:00 PM	05:00:00	0	

Figure 76: Schedule details pane

You can sort the information in the schedule details pane by organizing the headings. The schedule details column headings are as follows:

- **Employee name**—the employee to which the specified time event is scheduled
- **Schedule**—the schedule to which the specified time event is scheduled
- **Event type**—the events to which the specified time event is scheduled
- **Start date**—the start date of each scheduled event. You can modify this parameter in the schedule details pane. Changes are immediately reflected in the time bar pane
- **Start time**—the start time of each scheduled event. You can modify this parameter in the schedule details pane. Changes are immediately reflected in the time bar pane
- **End time**—the end time of each scheduled event. You can modify this parameter in the schedule details pane. Changes are immediately reflected in the time bar pane
- **Paid hours**—the total number of paid hours for the scheduled shift
- **Budget**—the total cost of the scheduled shift
- **Notes**—the notes on scheduled events you enter in this field

UNDERSTANDING FORECASTING CONCEPTS

Workforce Scheduling assists you in scheduling employees for work and holiday periods. It offers an integrated forecasting component that uses historical data to partially automate the scheduling process. Scheduling is not entirely automated. You may have to modify employee schedules and enter shift and employee variables manually after creating a schedule based on forecasted data.

You schedule employees so the number of incoming calls at any given time typically exceeds the number of employees currently available. This ensures callers experience a slight delay before employees answer their calls. The expected number of incoming calls forecasted for the time of day and day of the week influence scheduling decisions when trying to find the right balance between call volume and available staff.

For information on accessing historical data to assist when making schedules, see "Exporting forecasts to Workforce Scheduling" on page 143.

For information on forecasting variables and how to improve forecasting accuracy, see "Step #3 Forecast the Call Load" on page 26.

For information on Service Level variables and how to calculate the Service Level Percent, see "Understanding the Service Level" on page 19.

UNDERSTANDING THE WORKFORCE SCHEDULING PROCESS

Employees, agent IDs, agent groups, queues, queue groups, overtime types, time off types, holidays, and skills are configured by the System Administrator in YourSite Explorer. After these devices are configured, you must decide if you will use forecasted data to build your schedules. When you build a schedule in Workforce Scheduling using forecasted data, we recommend you associate the schedule with the queue group you will use to perform the forecast. You must ensure that the employees you want to schedule are associated with the queue group you associate to the schedule. You can optionally associate a schedule to a queue group with different employees, which can be useful for scheduling a new group of employees based on the forecasted data of other employees.

As soon as you start Workforce Scheduling, you can begin creating your schedules. After you log in, you are asked to create or select a schedule. You create a schedule by assigning it a name. If you are using a forecast to build the schedule, you associate the schedule with a queue group.

After you create the schedule, you configure schedule parameters, such as shifts, breaks, jobs, and scheduling preferences/options for each employee.

You can automate the schedule building process with the Schedule Builder tool. It helps you quickly build a schedule, with or without a forecast. If you build schedules using forecasted data, we recommend you use Schedule Builder. Alternately, you can build a schedule manually. This involves inserting or removing events (shifts, breaks, jobs, time off, unavailable periods) and making events recur. You can manually build a schedule based on forecast totals in the Totals pane. After you build a schedule using Schedule Builder, you may need to make a few adjustments.

WORKFORCE SCHEDULING AND YOUR CONTACT CENTER

Using Workforce Scheduling, you can schedule your employees to best suit your contact center needs. You can

- Customize schedules for your contact center groups
- Forecast scheduling requirements
- Match employee skills to the skills required for each schedule
- View the distribution of employees across schedules
- Print schedule reports

For information on scheduling considerations, and how to calculate the Shrinkage Factor and optimize scheduling, see "Step #5 Schedule agents" on page 31.

Using Workforce Scheduling, you can create schedules for your contact center using a variety of options. Depending on your contact center, some options may be more suitable than others. To help your company use Workforce Scheduling most effectively, we have created configuration scenarios that describe how to implement Workforce Scheduling, based on the type of scheduling used in your contact center.

Each Workforce Scheduling configuration scenario provides a description of the scheduling method and an example of contact centers that typically use that method. Each scenario also provides some tips on how to configure Workforce Scheduling for each style of scheduling. The scenarios include the following scheduling configurations:

- Assigned shift
- Availability
- Rotational
- Forecast

ASSIGNED SHIFT-BASED SCHEDULING CONFIGURATION SCENARIO

The assigned shift scheduling method uses fixed shifts staffed by employees who are permanently assigned to specific shifts. Contact centers that use assigned shift scheduling have consistent call volumes. Employees are primarily full-time staff and are guaranteed a specific number of hours of employment per week. Typically, you plan a schedule three to six months in advance with assigned shift scheduling.

Contact centers ideal for assigned shift scheduling

Assigned shift scheduling is best suited to contact centers that have a steady and predictable call volume, such as a contact center that runs a conventional nine to five operations. Examples of contact centers that use assigned shift scheduling include banks and government offices.

To configure Workforce Scheduling for an assigned shift scheduling environment

- Create fixed shifts
- Use shift names that describe a shift's purpose, such as '9 to 5 shift' or '1st shift'
- Use mass recurrence to repeat scheduled events for multiple weeks
- Configure employee hours using shift assignment by day of week

AVAILABILITY-BASED SCHEDULING CONFIGURATION SCENARIO

The availability scheduling method uses fixed shifts, but unlike assigned shift scheduling, the employees that work a given shift are not permanently attached to that shift. Contact centers that use availability scheduling fill shifts using a pool of employees.

A contact center supervisor sets staff availability based on day of week and time of day. When staffing a shift, the supervisor can assign any employee who is listed as available for that date and time to the shift. Typically, you plan a schedule two to four weeks in advance when you use availability scheduling.

Contact centers ideal for availability scheduling

Availability scheduling is best suited to contact centers driven by shifts, such as hotels or companies that focus on catalog sales. These contact centers have a specific number of shifts that can be filled by any qualified employees who are available. This type of schedule is frequently used with contact centers that operate 24/7.

To configure Workforce Scheduling for an availability scheduling environment

- Primarily use fixed shifts, but do not assign employees to specific shifts
- Assign employees all of the possible shifts they can work
- Set employee availability by day of week and time of day
- Use filters to assign the best employee available for a shift, based on skill set, seniority, or personal priority number

ROTATIONAL-BASED SCHEDULING CONFIGURATION SCENARIO

The rotational scheduling method consists of two or more unique schedules that recur at defined intervals. For example, if a contact center rotates four schedules, the week one schedule repeats in week five, week nine, and so on. The rotational scheduling method enables contact center schedules to be consistent in the long-term, while allowing shifts to vary from week to week.

Contact centers ideal for rotational scheduling

Rotational scheduling is best suited to contact centers that require specific employees to cover unique periods of time, such as medical clinics that are open on weekends. If each contact center employee is required to work one weekend a month, a rotational schedule can ensure an even distribution of weekend work for each employee.

To configure Workforce Scheduling for a rotational scheduling environment

- Primarily use assigned shifts with defined employees. The staff changes from one schedule rotation to the next ensure fair coverage on nights, weekends, and holidays
- Recur the shifts multiple times based on the number of rotations
- Manually track and adjust which employees are assigned to each rotation; Workforce Scheduling does not create a balanced schedule so you will need to make changes if you want to ensure the schedule is fair
- Optionally use rotational scheduling in conjunction with other schedule types. For example, create a schedule that uses the assigned shift method to cover Monday to Friday shifts and a second schedule that uses the rotational shift method to cover shifts such as weekends or holidays

FORECAST-BASED SCHEDULING CONFIGURATION SCENARIO

The forecast scheduling method references historical data to create schedules. Contact centers that use forecast scheduling have call volumes that can change considerably over relatively short periods of time, resulting in inconsistent scheduling.

Forecast scheduling provides more flexibility than other scheduling methods since shifts are not defined. A contact center that uses forecast scheduling does not have a fixed staff or fixed hours, as both change based on the expected call volume. Typically, you plan a schedule one to two weeks in advance with forecast scheduling.

Contact centers ideal for forecast scheduling

Forecast scheduling is best suited to contact centers driven by call volume, such as companies that focus on sales campaigns, promotions, or seasonal sales.

To configure Workforce Scheduling for a forecast scheduling environment

- Generate historical data specific to the type of event you are scheduling (for example, to create a schedule for a winter sales campaign, use historical data from a previous winter campaign)
- Create shifts with flexible start and end times to provide Schedule Builder with the greatest number of options when populating the shifts with employees
- Remember that shift variables, such as start/end times and breaks, will vary for employees on a day-to-day basis
- Due to the variety of shift start and end times, create breaks based on the Time to qualify variable
- Do not configure availability or shift assignment

SELECTING A SCHEDULING METHOD

You can build schedules in Workforce Scheduling:

- Using a forecast
- Manually

The setup you require depends on the scheduling method you choose. If you incorporate forecast data when you build a schedule, you must build the schedule using Schedule Builder.

SCHEDULING USING FORECAST DATA

When you use forecast data to build a schedule, you can apply historical data from any queue or queue group to the schedule. It is recommended to use historical data from the queue group with which the schedule is associated. Forecast data is simply the number of required agents. It can be used in schedules which are not associated with a queue or queue group.

Before you build a schedule using a forecast, as a best practice, we recommend you associate your schedule with a queue group. You should also ensure that the employees to be scheduled are associated with this queue group.

Ensure your System Administrator

1. Associates the agent IDs with an agent group.
2. Associates the agent group with a queue.
3. Associates the queue with the queue group (that you will associate with the schedule). Instructions for configuration and association of agents, agent groups, queues, and queue groups are located in the *MiContact Center Business Installation and Administration Guide*.

SCHEDULING MANUALLY

You have the most flexibility when you build a schedule manually. However, this can be time consuming if you must schedule a large number of employees or if you must create a schedule covering a long time period where shift assignments do not recur. You can also use manual scheduling to tweak schedules you build with Schedule Builder. See "Creating and adjusting schedules manually" on page 315.

SCHEDULE SETUP AND CUSTOMIZATION

In order to build a schedule in Workforce Scheduling, whether you build your schedule with forecasting or you build it manually, you must perform the following tasks to set up and customize your schedule:

1. Start Workforce Scheduling.
2. Configure schedule options.
3. Configure shifts, breaks, and jobs.
4. Assign shifts to schedules.
5. Assign shifts to employees.
6. Specify scheduling preferences/options for each employee in the schedule.
7. Specify schedule warnings.

STARTING WORKFORCE SCHEDULING ON A CLIENT COMPUTER

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

To log on to Workforce Scheduling

1. Open **Workforce Scheduling**.
   The Login window appears.

2. If prompted, type your **Username** and **Password** and verify the Enterprise Server IP address.

3. If you use Secure Socket Layer, select **SSL**.

4. Optionally, select **Remember my credentials**.

5. Click **Login**.
   The first time you log on, or if you have not created any schedules, the scheduler window displays. See "Configuring schedule options" on page 295.

   Otherwise, if schedules exist, the Load schedule window displays.

   See "Loading schedules" on page 315.

CONFIGURING SCHEDULE OPTIONS

NOTE:

- If you associate a schedule with a queue group, only those employees included in the selected queue group can be configured in the schedule. (Agents are members of agent groups, which are associated with queues that are members of queue groups.)

- If you do not associate a schedule with a queue group, you can schedule any employee whose profile enables you to schedule them in Workforce Scheduling.

Before you can build a schedule, either manually or using Schedule Builder, you must create a new schedule.

On the New Schedule window, you must:

- Name the schedule
- Associate the schedule with a queue or queue group (optional)
- Add employees to the schedule
- Configure business hours for the schedule
- Activate/Deactivate the schedule

You can create new schedules and configure all Workforce Scheduling options using the Schedule wizard. Optionally, use the Schedule tool to add, delete, rename, and activate/deactivate schedules. Within the Schedule configuration window, you can click Apply at any time to apply changes to the schedule without closing the Schedule configuration window.

Configuring scheduling options using the Schedule wizard

You can create new schedules and configure all Workforce Scheduling options using the Schedule wizard.

To configure scheduling options using the Schedule wizard

1. Click the **Configuration** tab.

2. In the **Schedules** group, click **Schedule wizard**.

3. Follow the steps in the Schedule wizard to configure schedules, business hours, employees, fixed/variable shifts, fixed/variable breaks and jobs, and fixed/variable shift assignments.

4. Click **Finish**.

Creating schedules

To create a schedule

1. On the Application menu or ribbon, click **New schedule**.
2. After **Schedule name**, type a name for the schedule.
3. Under **Employee association**, select either **All employees, Employees associated with this queue group only,** or **Employees associated with this queue only**.

    -   If you select Employees associated with this queue group, select a queue group from the list.
    -   If you select Employees associated with this queue, select a queue from the list.

4. If this schedule will be an active schedule, select the **This schedule is active** check box. Otherwise, select the **This schedule is used for planning purposes only** check box.
5. Click **OK**.
6. Select the check boxes of the employees to add to the schedule.
7. Click **OK**.

Adding employees to schedules

Schedules that contain fewer than 100 employees are easiest to manage. Each employee should belong to one active schedule only. However, if employees belong to more than one schedule, you can still view the shifts for which they are scheduled.

To add an employee to a schedule

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Select employees**.
3. After **Schedule**, select a schedule.
4. If you want to group employees in the list by supervisor, select the **Group by supervisor** check box.
5. Select the check boxes of the employees to add to the schedule.
6. Click **OK**.

Configuring business hours for schedules

You can specify different business hours for each schedule. By default, you are warned if you try to schedule shifts outside business hours.

To configure the business hours of a schedule

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. In the left pane, select **Schedules**.
4. Under **Schedules**, select the schedule to modify.
5. After **First day of the schedule week**, specify the day that the schedule will begin.

6. After **Annual calendar start date**, specify the date the calendar year begins.
   The information in this field is used to calculate annual minimum and maximum hours for employees. January 1st is the default date.

7. Specify business hours for the schedule.

   - If you want to schedule employees 24 hours a day, seven days a week, under Business hours, click **Open 24/7**.
   - After **Open**, select the check boxes of the days of the week to schedule.
   - After **From**, specify the start times for each day of the week to schedule.
   - After **To**, specify the end times for each day of the week to schedule.

8. Click **OK**.

Renaming schedules

You can rename a schedule without losing any information associated with the schedule.

To rename a schedule

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. Under **Schedules**, select the schedule to rename.
4. Click **Rename**.
5. After **Name**, type a new name for the schedule.
6. Click **Rename**.
7. Click **OK**.

Deleting schedules

CAUTION: Deleting a schedule deletes all of the information associated with that schedule. This cannot be undone.

To delete a schedule

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. Under **Schedules**, select the schedule to delete.
4. Click **Delete**.
5. Click **Yes**.
6. Click **OK**.

Activating / De-activating schedules

You can activate or deactivate a schedule at any time. Deactivating schedules is useful for performing 'what-if' scenarios, for seasonal schedules, and for retaining schedules to be used at a later time.

To activate or deactivate a schedule

1. Click **File=>Activate**.
    The Activate / Deactivate Schedule dialog box opens.

2. Select the schedule that you want to activate / deactivate.
    You can load multiple active schedules. However, if you load an inactive schedule, all other schedules close.

3. Click **Activate** to activate an inactive schedule or **Deactivate** to deactivate an active schedule.

4. Click **Close**.

CONFIGURING SHIFTS

A shift represents work hours on a given day for an employee. You can assign shifts to specific employees for any day of the week. You can create several shifts for one or more schedules. There are two types of shifts: fixed shifts and variable shifts. Fixed shifts have a fixed start time and duration. Variable shifts are based on the following shift variables:

- **Typical hours**—the number of work hours for the shift
- **Minimum hours**—the minimum number of hours for the shift
- **Maximum hours**—the maximum number of hours for the shift
- **Minimum start**—the time of day after which the shift must start
- **Maximum start**—the time of day by which the shift must start
- **Color**—the color in which the shift appears in the time bar pane

You configure the following shift options using the Schedule tool:

- Add fixed shifts
- Add variable shifts
- Rename shifts
- Delete shifts

Adding fixed shifts

To add a fixed shift

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. In the left pane, click **Shifts**.
4. In the right pane, click the **Fixed Shifts** tab.

5. In the right pane, click **Add**.

6. After **Name**, type a name for the fixed shift.

7. Click **Create**.

8. Under **Start time**, type the start time of the fixed shift.

9. Under **Duration**, type the duration of the fixed shift.

10. Under **Color**, select a color for the fixed shift.

11. Click **OK**.

Adding variable shifts

To add a variable shift

1. Click the **Configuration** tab.

2. In the **Schedules** group, click **Schedule**.

3. In the left pane, click **Shifts**.

4. In the right pane, click the **Variable Shifts** tab.

5. In the right pane, click **Add**.

6. After **Name**, type a name for the variable shift.

7. Click **Create**.

8. Under **Minimum hours**, type the minimum number of hours in a day you can schedule the shift.

9. Under **Typical hours**, type the typical number of hours in a day you can schedule the shift.

10. Under **Maximum hours**, type the maximum number of hours in a day you can schedule the shift.

11. Under **Minimum start**, type the time of day after which the shift must start.

12. Under **Maximum start**, type the time of day by which the shift must start.

13. Under **Color**, select a color for the variable shift.

14. Click **OK**.

Renaming shifts

You can rename fixed/variable shifts without losing any information associated with the shifts.

To rename a shift

1. Click the **Configuration** tab.

2. In the **Schedules** group, click **Schedule**.

3. Click the **Shifts** tab.

4. If you want to rename a fixed shift, click the **Fixed shifts** tab. Otherwise, to rename a variable shift, click the **Variable shifts** tab.

5. Under **Name**, click the name of the shift to rename.

6. Type a new name for the shift.

7. Click **OK**.

Deleting shifts

CAUTION: Deleting a shift deletes all of the instances of that shift, including those inserted in schedules.

To delete a shift

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. Click the **Shifts** tab.
4. If you want to delete a fixed shift, click the **Fixed shifts** tab. Otherwise, to delete a variable shift, click the **Variable shifts** tab.
5. Under **Name**, select the shift to delete.
6. Click **Delete**.
7. Click **Yes**.

CONFIGURING BREAKS

You configure the following break options using the Schedule tool:

- Add fixed breaks
- Add variable breaks
- Rename breaks
- Delete breaks

Examples of common breaks are morning break, lunch, afternoon break, and dinner break.

Adding fixed breaks

To add a fixed break

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. In the left pane, click **Breaks**.
4. In the right pane, click the **Fixed Breaks** tab.
5. Click **Add**.
6. After **Name**, type a name for the break.
7. Click **Create**.
8. If the break is a paid break, enable the check box under **Is paid**.
9. Under **Time into Shift**, type the time from the beginning of the shift at which the break must start.
10. Under **Duration**, type the amount of time allotted for the break.
11. Under **Color**, select a color for the break.
12. Click **Ok**.

Adding variable breaks

To add a variable break

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. In the left pane, click **Breaks**.
4. In the right pane, click the **Variable Breaks** tab.
5. Click **Add**.
6. After **Name**, type a name for the variable break.
7. Click **Create**.
8. Under **Duration**, type the amount of time allotted for the break.
9. If the break is a paid break, select the check box under **Paid**.
10. Under **Time to qualify**, type the minimum duration of a shift before you can schedule the break.
11. Under **Must start time** into shift, type the amount of time from the beginning of the shift that employees must work before they are entitled to the break.
12. Under **Must end time into shift**, type the amount of time from the beginning of the shift by which employees must complete the break.
13. Under **Minimum time** before end of shift, type the amount of time before the end of the shift that the break must end.
14. Under **Color**, select a color for the shift.
15. Click **OK**.

Renaming breaks

You can rename a break without losing any information associated with the break.

To rename a break

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. In the left pane, click **Breaks**.
4. If you want to rename a fixed break, in the left pane, click the **Fixed Breaks** tab. Otherwise, to rename a variable break, click the **Variable Breaks** tab.
5. Under **Name**, click the name of the break to rename.
6. Type a new name for the break.
7. Click **OK**.

Deleting breaks

CAUTION: Deleting a break deletes all of the instances of the break, including those inserted in schedules.

To delete a break

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. If you want to delete a fixed break, in the left pane, click **Fixed shifts**. Otherwise, to delete a variable break, click **Variable shifts**.
4. Click the **Breaks** tab.
5. Under **Name**, select the name of the break to delete.
6. Click **Delete**.
7. Click **Yes**.
8. Click **OK**.

CONFIGURING JOBS

Use jobs in a schedule to differentiate the Non ACD tasks that employees perform. You create jobs for a specific shift. If the job requires a specific set of skills, you can associate skills to jobs. After you associate skills to jobs, you can compare the skill (and skill level) of the employees to the skill required to perform a job. This will ensure the employees you schedule have the appropriate skills for their assigned jobs.

You configure the following job options using the Schedule tool:

- Add fixed jobs
- Add variable jobs
- Rename jobs
- Delete jobs

Adding fixed jobs

To add a job for a fixed shift

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. In the left pane, click **Jobs**.
4. In the right pane, click the **Fixed Jobs** tab.
5. Click **Add**.
6. After **Name**, type the name of the job.
7. Click **Create**.
8. If the job involves work on ACD calls, ensure the check box under **Is ACD** is selected.
9. Under **Time into Shift**, type the time from the beginning of the shift at which the job must start

10. Under **Duration**, type the duration of the job.

11. Under **Color**, select a color for the job.

12. Click **OK**.

Adding variable jobs

To add a job for a variable shift

1. Click the **Configuration** tab.

2. In the **Schedules** group, click **Schedule**.

3. In the left pane, click **Jobs**.

4. In the right pane, click the **Variable Jobs** tab.

5. Click **Add**.

6. After **Name**, type the name of the job.

7. Click **Create**.

8. If the job involves work on ACD calls, ensure the check box under **Is ACD** is selected.

9. Under **Color**, select a color for the job.

10. Click **OK**.

Renaming jobs

You can rename a job without losing any information associated with the job.

To rename a job

1. Click the **Configuration** tab.

2. In the **Schedules** group, click **Schedule**.

3. In the left pane, click **Jobs**.

4. If you want to rename a fixed job, click the **Fixed Jobs**. Otherwise, to rename a variable job, click the **Variable Jobs** tab.

5. Under **Name**, click the name of the job to rename.

6. Type a new name for the job.

7. Click **OK**.

Deleting jobs

CAUTION: Deleting a job deletes all of the instances of the job, including where it is inserted in schedules.

To delete a job

1. Click the **Configuration** tab.

2. In the **Schedules** group, click **Schedule**.

3. In the left pane, click **Jobs**.

4. If you want to delete a fixed job, click the **Fixed Jobs**. Otherwise, to delete a variable job, click the **Variable Jobs** tab.

5. Under **Name**, select the name of the job to delete.

6. Click **Delete**.

7. Click **Yes**.

Adding breaks or jobs to shifts

To add a break or a job to a shift

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. Click **Assignments**.
4. In the right pane, click the **Breaks and Jobs** tab.
5. Under **Shifts**, select the shift for which you will add shifts to.
6. Under **Breaks**, select the break to add to a shift.
7. Click **>** to assign the break to the shift.
8. Under **Jobs**, select the job to add to a shift.
9. Click **>** to assign the job to the shift.
10. Click **OK**.

Removing breaks and jobs from shifts

To remove a break or a job from a shift

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. Click **Assignments**.
4. In the right pane, click the **Breaks and Jobs** tab.
5. Under **Shifts**, select the shift for which you will remove breaks/jobs from.
6. Under **Breaks**, select the break to remove from the shift.
7. Click **<** to remove the break from the shift.
8. Under **Jobs**, select the job to remove from the shift.
9. Click **<** to remove the job from the shift.
10. Repeat steps 5-9 to remove additional breaks and/or jobs from shifts.
11. Click **OK**.

ASSIGNING SHIFTS TO SCHEDULES

NOTE: Schedule Builder uses the shifts you assign, combined with the employees' availability and shift assignment, to schedule shifts (or variations of them).

To assign shifts to schedules

1. Click the **Configuration** tab.
2. In the **Schedules** group, click **Schedule**.
3. In the left pane, click **Assignments**.
4. In the right pane, click the **Shifts** tab.
5. Under **Schedules**, select the schedule to which you will add shifts.
6. Under **Fixed Shifts**, select the fixed shift to add to the schedule.
7. Click **>** to assign the shift to the schedule.
8. Under **Variable Shifts**, select the variable shift to add to the schedule.

9. Click **>** to assign the shift to the schedule.

10. Repeat steps 6-9 for each shift you want to add to a schedule.

11. Click **OK**.

ASSIGNING SHIFTS TO EMPLOYEES

To assign a shift to an employee

1. Click the **Configuration** tab.

2. In the **Schedules** group, click **Configure employees**.

3. In the left pane, under **Schedules**, select the schedule containing the employee(s) to which you will assign shifts.

4. Under **Employees**, select the employee to which you will add shifts.

5. Under **Shift Assignment**, select the check boxes of the shifts that will be available to this employee.

6. Repeat steps 4-6 for each employee to which you will assign shifts.

7. Click **OK**.

CONFIGURING EVENT DISPLAY PREFERENCES

To make events easy to identify at a glance, you can specify how you want to display the scheduled events.

You can specify the following event display preferences:

- **Time bar content display—**provides descriptions, notes, or icons for scheduled events in the time bar pane

- **Smallest scheduling interval—**the smallest increment with which you insert events into the time bar pane

- **Default shift color—**the color for all of the shifts in the time bar pane. To override the default shift color, see "Configuring shifts" on page 298.

- **Default break color—**the color for all of the breaks in the time bar pane. To override the default break color, see "Renaming breaks" on page 301.

- **Default job color—**the color for all of the jobs in the time bar pane. To override the default job color, see "Configuring jobs" on page 302.

- **Default time off color—**the color for all of the time off types in the time bar pane. Your System Administrator is responsible for setting and changing the default time-off color.

- **Unavailable color—**the color for unavailable periods in the time bar pane

- **Tool tip display—**provides event information in tool tips on the time bar pane. The tool tip appears as a series of brackets depending on the information criteria you select

- **Time display—**the time format of the time bar pane. For example, 3 o'clock in the afternoon appears as 3 P.M. if you select *12 Hours*, or 15 if you select *24 Hours*

Configuring the time bar display

You can select from the following three time bar display options:

- **Icon**—refers to the icons of the scheduled shifts, time off events, and unavailable periods in the time bar pane
- **Type name**—refers to the names of the scheduled jobs in the time bar pane
- **Type notes**—refers to the notes of the scheduled jobs in the time bar pane

To specify how events display in the time bar

1. On the application menu, click **Preferences**.
2. Click the **Display** tab.
3. Under **Time bar content**, select the time bar content to display for Shifts, Jobs, Breaks, Time off, and Unavailable periods.
4. Click **OK** to save and close the Preferences window.

Configuring the smallest scheduling time interval

By default, events are snapped to the time bar grid in 30 minute increments. However, you can adjust the snap-to-grid interval to 5, 15, 30, or 60 minutes. Set the smallest scheduling time interval to the minimum number of minutes you want to insert events into a schedule. For example, if you select 15 minutes as the smallest scheduling interval, you cannot insert events for an employee in increments smaller than 15 minutes.

The default scheduling interval is 15 minutes, which we recommend, as changing this to a smaller interval will increase the amount of time it takes for Schedule Builder to build schedules.

To configure the smallest scheduling time interval

1. On the application menu, click **Preferences**.
2. Click the **General** tab.
3. Under **Scheduling preferences**, after **Smallest scheduling interval**, select the snap-to-grid time interval.
4. If you want to prevent the user from manually making any change that would trigger a warning, select the **Warnings are hard limits for the user** check box.
5. Click **OK** to save and close the Preferences window.

Preventing users from manually making changes that trigger warnings

You can configure Workforce Scheduling to prevent users from making changes that trigger warnings.

To prevent users from manually making changes that trigger warnings

1. On the application menu, click **Preferences**.
2. Click the **General** tab.
3. Select the **Warnings are hard limits for the user** check box.
4. Click **OK** to save and close the Preferences window.

Configuring the default colors on the time bar

To configure the default colors used for events on the time bar

1. On the application menu, click **Preferences**.
2. Click the **Display** tab.
3. Under **Default Timebar Colors**, after **Default Shift Color**, select a color.
4. Repeat step 3 for **Default Break Color**, **Default Job Color**, **Default Time Off Color,** and **Unavailable Color**.
5. Click **OK** to save and close Preferences window.

Configuring the time format

There are two time formats you can select from: the 24 hour international format or the 12 hour format which uses A.M. and P.M. to indicate morning and afternoon. For example, 3 o'clock in the afternoon appears as 15 if you select the 24 hour time format or 3 P.M. if you select the 12 hour time format.

To configure the time format

1. On the application menu, click **Preferences**.
2. Click the **General** tab.
3. After **Hour Format**, select either **12 Hours** or **24 Hours**.
4. Click **OK**.

Configuring tool tip display

You can specify the following information in tool tips for shifts, jobs, breaks, time off events, unavailable periods, and shadow events:

- **Schedule name—**provides the name of the schedule in which the event appears.
- **Is recurring**—displays if the event recurs.
- **Type—**provides the name of the event.
- **Type name—**states if the event is a shift, job, break, time off event, unavailable period, or shadow event.
- **Start/End Time—**provides the start and end time of the event.
- **Event Notes—**provides any notes from the detail grid for the event.

To configure the tool tip display

1. On the application menu, click **Preferences**.
2. Click the **Display** tab.
3. Under **Tooltip Display**, select the check boxes for the tool tips to display.
4. Click **OK**.

CONFIGURING WARNINGS

Warnings notify you when you try to schedule events outside of your scheduling parameters.

You can set the following warnings:

- Schedule warnings
- Shift warnings
- Break warnings
- Job warnings
- Overtime warnings
- Time Off warnings
- Employee scheduling warnings
- Schedule Builder warnings
- Employee selection warnings

To configure warnings

1. On the application menu, click **Preferences**.
2. Click the **Warnings** tab.
3. Ensure the check boxes of the warnings you want to configure are selected.
   See Table 22.
4. Click **OK**.

Table 22:   Warnings

WARNING	DESCRIPTION
Scheduling work on company holidays	notifies you when events are scheduled on company holidays
Scheduling work outside business hours	notifies you when you try to schedule events outside of your contact center's business hours
When scheduling outside employee's availability	notifies you when you try to schedule employees who are not available at the specified time
Violates Length of Service Qualifications	notifies you when an employee has worked fewer or more months required to qualify for a specific type of time off
Exceeds accrued hours	notifies you when an employee is scheduled for more time off hours than is available to that employee at that time
Exceeds Maximum Scheduling Limit	notifies you when an employee is scheduled for more time off hours than specified for that type of time off
Less than Minimum Scheduling Limit	notifies you when an employee is scheduled for fewer time off hours than specified for that type of time off

Table 22:   Warnings (continued)

WARNING	DESCRIPTION
Employee does not have required skills	notifies you when an employee does not have the required skills for the job for which they are scheduled
Exceeds Daily Maximum Work Hours	notifies you when an employee is scheduled for more hours in a day than defined by the parameter for that shift
Below Daily Minimum Work Hours	notifies you when an employee is scheduled for fewer hours in a day than defined by the parameter for that shift
Exceeds Weekly Maximum Work Hours	notifies you when an employee is scheduled for more hours in a week than defined by the parameter for that shift
Below Weekly Minimum Work Hours	notifies you when an employee is scheduled for fewer hours in a week than defined by the parameter for that shift
Exceeds Yearly Maximum Work Hours	notifies when an employee is scheduled for more than the annual maximum hours required
Below Yearly Minimum Work Hours	notifies you when an employee is scheduled for less than the annual minimum hours required
Start time outside of specified range	notifies you when an employee's shift is scheduled to start before (minimum) or after (maximum) the parameters defined for that shift
Within Minimum Time Between Shifts	notifies you when an employee is scheduled to start another shift too soon following the one previously completed
Below hours worked to qualify	notifies you when an employee is scheduled for a break before working enough hours after the last break in that shift to qualify for another break
Starting before earliest start time	notifies you when an employee is scheduled for the first break in a shift before a break can be taken
Ending after latest end time	notifies you when an employee is scheduled for the last break in a shift after a break can be taken
Removing an employee from a schedule	notifies you when you attempt to delete an employee from the schedule
Accepting a generated schedule	notifies you when you attempt to save a schedule you have built
Scheduled shift will cause overtime	notifies you when a shift qualifies an employee for overtime

FORECASTING DATA FOR SCHEDULES

After setting up and customizing your schedule, if you are building a schedule from forecasted data, you must run the Forecasting tool and export the forecast into your schedule before you can select this option in the schedule builder or schedule builder wizard.

For information on the Forecasting tool, see "Forecasting tool" on page 135.

To access the Forecasting tool

1. Click **Tools** in the **Workforce Scheduling** ribbon.
2. In the **Data Mining** section, click **Forecasting**.

SCHEDULE CREATION

You can create and customize schedules in Workforce Scheduling using specific parameters that suit the needs of your contact center. You can build schedules manually or with the Schedule Builder tool. Schedule Builder automates the schedule building process. It uses pre-defined employee and schedule options to create schedules. See "Schedule setup and customization" on page 294.

Schedule Builder helps you build a schedule with or without forecast data. If you are building a schedule with forecast data, you must export the forecast data into your schedule before running the Schedule Builder if you want to build a schedule with forecast data. See "Forecasting data for schedules" on page 310.

You can also use manual scheduling to modify schedules you build with Schedule Builder. See "Creating and adjusting schedules manually" on page 315.

NOTE: After you generate a schedule with Schedule Builder, you must accept or reject schedule changes before you can generate another schedule.

Schedule Builder uses the following parameters to create a schedule automatically:

- Date/time range
- Shifts
- Breaks
- Forecast data
- Business hours
- Employees
- Employee scheduling preferences
- Scheduling options
- Shift options
- Schedule algorithm options

BUILDING SCHEDULES WITH SCHEDULE BUILDER

NOTE: After you generate a schedule with Schedule Builder, you must accept or reject schedule changes before you can generate another schedule.

To build a schedule with Schedule Builder

1. Click the **Tools** tab
2. In the Schedule Builder group, click **Manual**.
3. Under **Schedule name**, select a schedule.
4. Specify the scheduling parameters on each tab of the Schedule Builder tool.
5. Click **Build**.
   A dialog box appears reminding you that changes to the schedule will not be committed to the database until you click Accept Schedule.
6. Click **OK**.
   The Accept Schedule and Reject Schedule buttons appear in the toolbar.
7. Verify the schedule.
8. Make any required modifications manually.
9. Click **Accept schedule** to save the new schedule.
   NOTE:
   - After you click Accept Schedule, the schedule is live in the database and the Accept Schedule button disappears. If you click Reject Schedule, the automatically generated schedule and any manual modifications are deleted from the schedule. See "Creating and adjusting schedules manually" on page 315.
   - If there are any conflicts, a dialog box appears stating the number of conflicts. You cannot save a schedule with conflicts. Click Yes to delete the conflicts and accept the schedule, or click No to adjust the schedule. When you have resolved the conflicts, click Accept Schedule again to save the schedule.

Configuring the date and time range

To configure the date and time range for a schedule using Schedule Builder

1. In **Schedule Builder**, click the **General** tab.
2. Under **Dates and times,** on the **Date / Time** tab, select the date range of the schedule.
3. Under **Time**, select either **Use business hours, 24/7,** or **Custom**.
4. If you selected **Custom** in the previous step, select the time the schedule starts and ends each day.
5. If you want to exclude dates from the schedule, click the **Exclusion** tab.
6. Hold down **CTRL** and then click the dates to exclude.

Scheduling shifts

To schedule shifts using Schedule Builder

1. In **Schedule Builder**, click the **General** tab.
2. Under **Schedule/Optimize**, select the **Shifts** check box.
3. Under **Event selection**, on the **Shift selection** tab, select the check boxes of the shifts to add to the schedule.

4. Click the **Shift, Break, & Job options** tab.

5. Under **Shift options**, specify how shifts will be distributed.

   - If you want to count existing shifts when determining the number of employees to be scheduled, select the **The Schedule Builder counts existing shifts when determining the number of employees which must be scheduled** check box.

   - If you want to optimize existing unlocked shifts, select the **Allow Schedule Builder to optimize existing unlocked shifts** check box.

   - If you want to optimize existing locked shifts, select the **Allow Schedule Builder to optimize existing locked shifts** check box.

   - If you want to schedule unassigned shifts for times when there are not enough employees available to satisfy the scheduling requirements, select the **Generate unassigned shifts when not enough employees are available to satisfy the schedule requirements** check box.

   - If you want to ignore employee shifts assignments when building the schedule, select the **Ignore employee shift assignments** check box.

Scheduling breaks

To schedule breaks using Schedule Builder

1. In **Schedule Builder**, click the **General** tab.

2. Under **Schedule/Optimize**, select the **Breaks** check box.

3. Under **Event selection**, on the **Break selection** tab, select the check boxes of the break types to add to the schedule.

4. Click the **Shift, Break, & Job options** tab.

5. Under **Schedule/Optimize breaks**, select the check boxes of the shift types to apply breaks.

Scheduling jobs

To schedule jobs using Schedule Builder

1. In **Schedule Builder**, click the **General** tab.

2. Under **Schedule/Optimize**, select the **Fixed Jobs** check box.

3. Under **Event selection**, on the **Fixed Job selection** tab, select the check boxes of the job types to add to the schedule.

4. Click the **Shift, Break, & Job options** tab.

5. Under **Schedule fixed jobs on**, select the check boxes of the job types to apply shifts.

Generating schedules with forecast data

To build a schedule with forecast data using Schedule Builder

1. In **Schedule Builder**, click the **General** tab.
2. Under **Schedule Builder method**, after **Method**, select **Forecasted data**.
3. If you want fewer employees scheduled than are forecasted, move the slider towards **Underschedule**.
4. If you want more employees scheduled than are forecasted, move the slider towards **Overschedule**.
5. If you want to adjust the number of forecasted employees, next to **Increase/decrease the number of forecasted employees by**, enter a number.

Generating schedules without forecast data

To build a schedule without forecast data using Schedule Builder

1. In **Schedule Builder**, click the **General** tab.
2. Under **Schedule Builder method**, after **Method**, select **Explicit requirements**.
3. After **Number of employees to schedule**, enter a number.
4. If you want fewer employees scheduled than are forecasted, move the slider towards **Underschedule**.
5. If you want more employees scheduled than are forecasted, move the slider towards **Overschedule**.

Generating schedules for your entire workforce

To build a schedule for your entire workforce using Schedule Builder, regardless of employee availability

1. In **Schedule Builder**, click the **General** tab.
2. Under **Schedule Builder method**, after **Method**, select **Entire workforce**.
3. If you want to enable employee filtering, select the **Enable employee filtering** check box.

Selecting employees

To select the employees you want to schedule using Schedule Builder

1. In **Schedule Builder**, click the **Employee filtering** tab.
2. If you want to filter employees by agent group, under **Agent group**, select the check boxes of the agent groups to schedule.
3. If you want to filter employees by their skills, under **Skill**, select the check boxes of the required skills. Otherwise, skip to step 6.
4. Under the list of available skills, select an operand.
   - If the employees must have a skill level greater or equal to the skill level required, select **>=**.
   - If the employees must have a skill level lower or equal to the skill level required, select **<=**.
   - If the employees must have a skill level exactly equal to the skill level required, select **=**.

5. If you want to filter employees by name, under **Select employees with this name**, type an employee's name.

6. If you want to select specific employees, under **Selected employees**, select the check boxes of the employees to schedule.

7. Click the **Employee sorting** tab.
   NOTE: You must configure the employee payroll information in order to select the seniority and pay rate parameters.

8. If you want to prioritize how shifts are distributed to employees, select the **Use employee sorting** check box, and select the criteria with which to sort employees.

9. If you want to assign or edit employee priority numbers, under **Employee priority**, select an employee.

10. Under **Priority**, type a personal priority number.

11. Click the **Overrides** tab.

12. If you want to override employee work hour preferences, under **Work hours**, select the check boxes to override daily work hours, weekly work hours, and the minimum time between shifts.

13. If you want to override employee availability, under **Availability**, select the check boxes to override employee availability and unavailable events currently applied to the schedule.

14. If you want to override scheduled time off, under **Time off**, select the **Override time off events currently applied to the schedule** check box.

15. If you want to override an employee's skills required to do the fixed job, under **Fixed Jobs**, select the **Override an employee's skills required to do the fixed job**.

Configuring scheduling options

To configure schedule options Schedule Builder uses to create a schedule

1. In **Schedule Builder**, click the **Advanced options** tab.

2. Under **Schedule algorithm performance**, specify the settings Schedule Builder will use to build the schedule.

3. If you want to optimize break distribution, under **Optimization types**, select the **Optimize break distribution** check box.

4. If you want to optimize shift placement, select the **Optimize shift placement** check box.

5. If you want to optimize shift size, select the **Optimize shift size** check box.

6. If you want to balance the distribution of employee shifts over the week, select the **Balance over the week** check box.
   Selecting this option ensures that Schedule Builder does not completely fill the requirements of the first few days of the schedule and understaff employee requirements by the end of the week.

CREATING AND ADJUSTING SCHEDULES MANUALLY

You can create entire schedules manually. However, if you must schedule a large number of employees it can be quite complicated and time consuming. Schedule Builder automates the process and builds schedules for you. You can manually adjust schedules created with Schedule Builder. You can create and adjust schedules manually in the following ways:

- Load a schedule
- Populate a schedule with events
- Drop insert an event
- Drag insert an event
- Recur an event
- Mass recur an event
- Mass delete an event
- Mass apply time off
- Modify a forecast total
- Modify event times or notes

Loading schedules

NOTE: Your access rights determine which schedules you can view, modify, or manage.

To load a schedule

1. Click **File=>Load schedules**.
2. Select the schedule(s) to load.
3. If you want to load all active schedules, select the **Select all active schedules** check box.
4. Click **Load**.

Populating schedules with events

NOTE:

- Your access rights determine which schedules you can view, modify, or manage.
- For ease of use and accuracy when inserting events, select a schedule view of less than 1 week (View=>Schedule View) prior to insertion.

You can manually insert the following events into a schedule:

- Shifts
- Breaks
- Jobs
- Time off
- Unavailable periods

You can insert events in a schedule by either dropping or dragging them on an employee's time line on the time bar pane. You can optionally drop insert breaks or jobs into already existing fixed shifts. Drop inserting events is most useful for fixed events, as the duration of the shift is predefined. Drag inserting events is most useful for variable shifts, as the duration can vary depending on the defined parameters for a specific event.

NOTE: To accommodate for last minute scheduling changes, you can optionally schedule time off and unavailable events in the middle of scheduled shifts or schedule a shift in the middle of time off and unavailable events.

Drop inserting events

To drop insert an event

1. Click the **Insert** tab.
2. Click **Drop**.
3. Under **Event**, select the event to add to the schedule.
4. Under **Schedule**, select the schedule to add events to.
5. Under **Event name**, select the name of the event to add to the schedule.
6. On the time bar pane, click the employee's time line to insert the event.
   The event is added to the schedule.
7. Repeat steps 3-6 for every event to add to the schedule.

Drag inserting events

NOTE: Drag insert is not available in the 1 month schedule view.

To drag insert an event

1. Click the **Insert** tab.
2. Click **Drag**.
3. Under **Event**, select the event to add to the schedule.
4. Under **Schedule**, select the schedule to add events to.
5. Under **Event name**, select the name of the event to add to the schedule.
6. On the time bar pane, click the employee's time line and drag the cursor from the start time to the end of the event.
7. Repeat steps 3-6 for every event to add to the schedule.

Recurring events

You can recur shifts, time off, and unavailable events.

To make an event recur

1. On the time bar pane, on the employee's time line, right-click the event to recur.
2. Click **Recurring**.
3. Click **Daily**, **Weekly**, or **Monthly recurring**.
4. Specify the pattern and range of the recurrence.
5. Click **OK**.

Mass recurring events

You can use the Mass recurrence wizard to create multiple recurrences for several events automatically. The wizard allows you to mass recur shifts, time off, and unavailable periods based on either a daily or weekly template.

NOTE: Manual or mass deletion is required to remove the generated events.

To mass recur events

1. Click the **Tools** tab.
2. In the **Bulk operations** group, click **Recurrence**.
   The Mass Recurrence wizard opens.
3. Click **Next**.
4. Follow the steps in the wizard to specify the parameters of the events to mass recur.
5. Click **Finish**.
6. Click **Yes**.

Mass deleting events

You can delete one or more scheduled events (shifts, time off periods, unavailable periods, breaks, and jobs) at a time with the Mass delete option. Only the selected events are deleted from the schedules.

To mass delete scheduled events

1. Click the **Tools** tab.
2. In the **Bulk operations** group, click **Delete**.
3. Specify the date range affected, event types to delete, and the schedules to delete events from.
4. Click **OK**.

Mass applying time off

You can apply time off to any or all agents in a schedule simultaneously.

To mass apply time off

1. Click the **Tools** tab.
2. In the **Bulk Operations** group, click **Time Off**.
   The Timeoff Mass Insert dialog box opens.
3. Select a schedule from the **Schedules** drop-down list.
4. Hold down **CTRL** and then click the agents to which you want to apply the time off type. If you want to select all agents, click **Select All**.
5. Under **Time off**, select the time off type from the list.
6. Select the start and end dates, days of the week, and start and end times for the time off type.
7. After selecting the time off time, select **Mark remaining periods of the day as unavailable** if you want the hours outside of the start and end times to be unavailable for scheduling.
8. Click **OK**.

Modifying forecast totals in the event totals pane

If you build schedules with forecast data, you can adjust the forecast totals on the event totals pane. On the events totals pane, you can change forecast totals in time intervals as small as 15 minutes. The schedule view you select determines the time interval of the forecast totals. See "Changing the time interval of the time bar pane" on page 320.

For example, if you select the 8 hour schedule view, you can change the forecast data in 15 minute intervals. However, if you select the 1 day schedule view, you can change the forecast data in 1 hour time intervals. When you change the forecast data in an interval larger than 15 minutes and then change the view to smaller intervals, you will notice that the change applies to each of the smaller intervals.

NOTE: Schedule Builder uses the latest forecast data to calculate the number of employees required.

To change the forecast totals in the events totals pane

1. After **Totals**, click **+**.
2. Select the **Forecast** check box and the check boxes of any other event totals to view.
3. Click **-**.
4. Click the **View** tab.
5. Under **Schedule view**, select a time interval.
   See Table 23.
6. Click the **+** before **Forecasted** to expand the forecast tree.
   The event totals for the loaded schedules appear.

   NOTE: You can use the Tab key to select cells to the right, and the Shift+Tab keys to select cells to the left.
7. Click a cell in the forecast event total grid and type the new forecast total for this time interval.

Modifying event times and notes in the schedule details pane

The changes you make to event start times and end times in the schedule details pane are immediately reflected in the time bar pane.

To modify the start and end times of events in the schedule details pane

1. On the schedule **Details** pane, click the **Start Time** or **End Time** of an event.
2. Type the new time.
   The new time is immediately reflected in the time bar pane.
3. Repeat for any other event times to modify.

To modify the start and end times of events in the time bar pane

1. Click the **Insert** tab.
2. Click **Select**.
3. On the time bar pane, select the event to modify.
4. Drag and drop the event to adjust its start and end times.
   The new time is immediately reflected in the time bar pane.
5. Repeat for any other event times to modify.

To add/edit a note for a scheduled employee

1. On the schedule **Details** pane, click the note field for an employee.
2. Click the **...** button.
   The Notes editor appears.
3. Type/edit a note.
4. Click **OK**.

SCHEDULE DISTRIBUTION

You can specify viewing preferences, specify access rights to schedules, and run and print reports.

VIEWING SCHEDULES

You can specify how you view the time bar pane. Use the scroll bar to view other days and times in the schedule. If you reach the end of the month and want to view dates for the next month, you can click the arrow on the scroll bar to load the schedule for the next month. By default, events you insert into a schedule are snapped to the grid in 30 minute increments.

To view a specific date

1. From any tab in Workforce Scheduling, click **Select date**.
2. Click the date to view.
   The time bar will display the date you selected to view.

Viewing scheduled events

You select how event time bars appear in **File=>Preferences**. You can isolate shifts, time off, and unavailability to view them separately in the time bar pane. You must view breaks and jobs with shifts. You cannot isolate breaks and jobs in the time bar pane. See "Configuring event display preferences" on page 305. You can select what information displays in the Tooltip in Preferences. For more information, see "Configuring tool tip display" on page 307.

If employees belong to more than one schedule and you are viewing only one of the schedules to which the employees belong, any events scheduled in the other schedule will appear as a shadow event (gray bar) in the time bar view. Shadow events will not display for inactive schedules.

To view shifts

- On the **View** tab, in the **Show/Hide** group, select the **Shift** check box.

To view jobs

- On the **View** tab, in the **Show/Hide** group, select the **Job** check box.

To view breaks

- On the **View** tab, in the **Show/Hide** group, select the **Break** check box.

To view time off

- On the **View** tab, in the **Show/Hide** group, select the **Time off** check box.

To view unavailable periods

- On the **View** tab, in the **Show/Hide** group, select the **Unavailable** check box.

To view shadow events

- On the **View** tab, in the **Show/Hide** group, select the **Shadow** check box.

Changing the time interval of the time bar pane

You can view schedules in the time bar pane over 8 hour, 12 hour, 1 day, 2 day, 1 week, 2 week, or 1 month time intervals. The default view is the 12 hour view.

To change the time interval in the time bar pane to one week

1. Click the **View** tab.
2. In the **View options** group, under **Schedule view**, select the interval to view.
3. Optionally, under **Group view**, select **Supervisor** to group employees in the time bar pane by schedule.

Viewing event totals

Event totals represent the total number of employees for an event. You can view event totals in 15 minute, 30 minute, 1 hour, 4 hour, or 1 day time intervals. Table 23 displays the event total time intervals that correspond to the schedule views.

Table 23: Schedule views and corresponding event total time intervals

SCHEDULE VIEW	EVENT TOTALS TIME INTERVAL
8 hour	15 minute
12 hour	30 minute
1 day	1 hour
2 day	4 hour
1 week	1 day
2 week	1 day
1 month	1 day

You can select from the following event totals:

Forecast—appears only after you have applied a forecast to a schedule. This total represents the number of employees required to meet your specified Service Level objectives.

Scheduled—represents the number of employees scheduled at that time

Over/Under—represents the excess (over) or inadequate (under) number of employees scheduled when compared to the number of employees forecasted.

On Break—represents the number of employees scheduled for a break at a certain time

ACD Jobs—represents the number of employees scheduled to perform ACD jobs

Non ACD Jobs—represents the number of employees scheduled to perform Non ACD jobs

At work—represents the number of employees scheduled to handle interaction requests

Overtime—represents the number of employees scheduled for overtime

To view event totals

1. In the **Totals** pane, click **+**.
2. Select the check boxes of the event totals to view.
3. Click -.
   The totals pane appears with the event totals you selected.

Viewing schedule details

To group information in the schedule details pane

- On the schedule details pane, drag and drop the column header to organize to the **Drag a column header here to group by that column** area on the window.

To sort information in the schedule details pane alphabetically

- On the schedule details pane, click the header of the column to sort alphabetically.

To filter information in the schedule details pane

1. On the schedule details pane, click the arrow on a column header.
2. Select the filter criteria.

Synchronizing views

You can synchronize the people pane, time bar pane, and totals pane with the order of the information in the schedule details pane. Once you have organized the details of your schedules (sorting, filtering, and grouping) in the schedule details pane, synchronize views to reflect the order you have selected. For information on how to sort, filter, or group schedule details, see "Viewing schedule details" on page 321.

To synchronize views

1. Click the **View** tab.
2. Select the **Synchronize time bar view with details view** check box.
3. Optionally, select the **Vertical scrolling** check box.

RUNNING WORKFORCE SCHEDULING REPORTS

The Workforce Scheduling reports are produced in Microsoft Excel format. You run and print the following Workforce Scheduling reports from CCMWeb. For more information, see the Reports Guide appropriate to your MiContact Center Business licensing level.

You can produce on-demand reports and scheduled reports for the following reports:

- Detailed Schedule by Employee with Totals
- Schedule by Employee by Time Off by Day of Week
- Employee Configuration
- Summary Schedule by Employee
- Schedule Coverage Totals by Type
- Work Hours Summary Schedule by Employee

Workforce Scheduling reports are found in CCMWeb, under **Reporter=>Workforce Scheduling=>Schedules**.

SCHEDULE ADHERENCE

Mitel Schedule Adherence is an optional application that works in conjunction with MiContact Center Business and Workforce Scheduling. Schedule Adherence resides in the Contact Center Client real-time monitors and enables you to view the real-time state of contact center employees scheduled in Workforce Scheduling. Schedule Adherence compares the current activities of employees to the configured schedule and alerts you in real time when employees are out of adherence. Employees are considered out of adherence if they are early or late for their scheduled events or if they are not performing scheduled events.

Once you have configured a schedule in Workforce Scheduling, you

- Configure adherence preferences in Workforce Scheduling
- View adherence monitors in Contact Center Client
- Set adherence alarms on the Employee State by Position/Time monitors (optional)
- Run reports on employee adherence to scheduled events

CONFIGURING ADHERENCE PREFERENCE

You can configure adherence thresholds for shifts, breaks, and jobs. You can set parameters for each event type to suit the needs of your business. You select employee states and assign them to relevant events and specify event time tolerance levels. You can optionally configure groups of employee states and then associate them to relevant employee events.

NOTE:

- Schedule Adherence will handle two or more overlapping adherence thresholds in one of the following ways. If only one of the events is valid for the current employee state, that event will be used. If more than one event is valid for the current employee state, the first event, using start time, will be used.
- If no states are specified for an event type, all states will be considered in adherence.

Configuring adherence parameters

To configure adherence parameters

1. In Workforce Scheduling, click the **Configuration** tab.
2. In the **Adherence** group, click **Adherence Configuration**.
   The Adherence Parameters window opens.
3. In the left pane, expand the event type list and select the event to which you want to add relevant adherence states.
4. Under **Event start tolerance (hh:mm)**, specify the times before and after which an employee state will be reported on as out of adherence.
5. Under **Event end tolerance (hh:mm)**, specify the times before and after which an employee state will be reported on as out of adherence.
6. Under **Available states**, select the states which are relevant for the specified event type and click **>** to move the state to the **Assigned states** list.
7. Repeat the above steps for each event type for which you want to configure adherence parameters.
8. Click **OK**.

Configuring state groups

To configure a state group

1. In Workforce Scheduling, click the **Configuration** tab.
2. In the **Adherence** group, click **State groups**.
   The State groups window opens.
3. Click **Add**.
4. Type a name for the state group and click **Create**.
5. Under **Available states**, select the states that are relevant for the state group and click **>** to move the state to the **Assigned states** list.
6. Repeat steps 2-5 for each state group you want to configure.
7. Click **OK**.

VIEWING ADHERENCE MONITORS IN CONTACT CENTER CLIENT

Schedule Adherence includes two Contact Center Client monitors that enable you to monitor employee adherence to schedules in real time. The Schedule Adherence monitors alarm on employees who are not adhering to schedules based on the thresholds you specify in Workforce Scheduling and the alarms you configure in Contact Center Client. You can optionally set adherence alarms on the Employee State by Position/Time monitors.

Adherence Detail Grid monitor

The Adherence Detail Grid monitor displays employee scheduled events, expected states, and event totals. It enables you to easily compare expected employee states and actual employee states in real time.

There are three levels to the Adherence Detail Grid monitor. The first level provides a high level overview of employee adherence. The second level has two grids. The first lists all of the embedded events (breaks and jobs) for the shift and the associated adherence information. The second grid lists the out of adherence record for the shift. The final level has only one grid, which represents the out of adherence record for the embedded events.

Table 24 provides column heading definitions for the Adherence Detail Grid monitor.

Table 24:   Adherence Detail Grid monitor headings

HEADING	DEFINITION
Employee	the name of the employee being monitored
Is in Adherence	the check box is enabled when the employee is adhering to the schedule
Scheduled	the type of event (shift, break, or job) the employee is performing, whether in or out of adherence
Expected States	the employee states that are relevant for the type of scheduled event the employee is scheduled to perform
Actual State	the current employee state. If this is one of the expected states, the employee is adhering to the schedule
Scheduled Start	the time at which the employee is scheduled to start the scheduled event
Actual Start	the time at which the employee started the scheduled event. This column may be blank if the employee has not come into adherence for the scheduled event
Scheduled End	the time at which the scheduled event is to end
Current Out Of Adherence	the amount of time the employee has been out of adherence since the last scheduled event, minus any tolerances configured. This column will be blank if the employee is adhering to the schedule
Total Out Of Adherence	the total amount of time the employee has been out of adherence for all scheduled events for the current shift
Shift Time	the duration of time the employee has been working the current shift
% Out Of Adherence	the percent of time the employee has been out of adherence for the elapsed portion of the scheduled shift
Shift	the name of the shift for which the employee is scheduled
Embedded	the name of the embedded event type (break or job)
Start	the time at which the employee went out of adherence
End	the time at which the employee came back into adherence
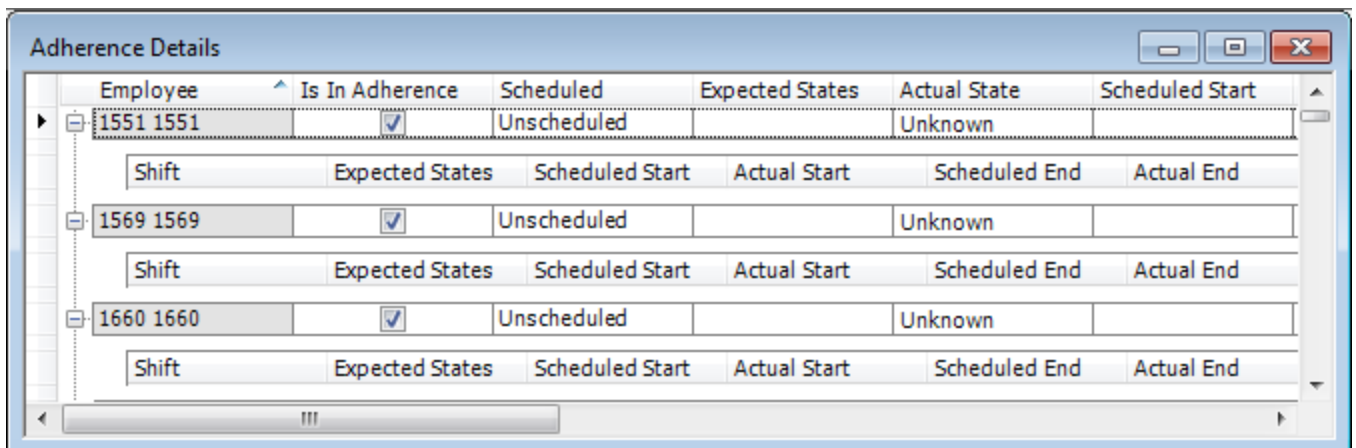
You can set alarms on the Adherence Grid monitor to alarm on employee adherence. For example, in an adherence grid monitor, you could set an alarm on the Scheduled variable and set the value to Unscheduled and have it display as red text, enabling you to clearly see when an employee is not adhering to the shift as expected.

You can alarm on the following performance variables in the adherence detail grid monitor:

- Out of adherence
- Scheduled
  NOTE: To alarm for when the employee is in Time off or Unavailable states, set the value to Unscheduled.
- Expected states
- Actual state
- Actual start
- Current Out of Adherence
- Total Out of adherence
- Shift time
- % Out of adherence

To open the Adherence Detail Grid monitor

1. Click the **Real Time** tab in the Contact Center Client ribbon.
2. From the drop-down arrow in the **Adherence** column, select **Detail Grid**.
   The Add/Remove device IDs window opens.
3. Select the **Employees** or **Schedules** for which you want to review Adherence.
4. Click **OK**.
   The Adherence Details monitor opens.

   See Figure 77.

Figure 77: Adherence Detail Grid monitor

To alarm on schedule adherence in an Adherence Detail Grid monitor

1. Right-click anywhere in the monitor and click **Set alarms**.
2. Under **Performance variables**, select the variable you want to monitor.
3. Under **Alarm thresholds**, click **Add** and select a value for that variable you selected as well as the alarm notification options that will indicate when the variable exceeds those boundaries.
   For more information on configuring monitor alarms, see "Setting alarms" on page 111.
4. If you want to add further alarms for the variable, repeat step 3.

5. If you want to add an alarm for another variable, repeat steps 2-5.

6. Click **OK** to save the alarms.

Adherence Timebars monitor

The Adherence Timebars monitor provides a schedule time bar, based on the employee time bar and event colors configured in Workforce Scheduling, for each employee's scheduled events. The current time is identified by a green line on the employee time bar and past events are shaded purple.

You can set alarms on the Adherence Grid monitor to alarm on employee adherence. The following performance variables can be alarmed on in the adherence timebars monitor:

- Shift out of adherence
- Break out of adherence
- Job out of adherence

To open the Adherence Timebar monitor

1. Click the **Real Time** tab in the Contact Center Client ribbon.

2. From the drop-down arrow in the **Adherence** column, select **Timebars**.
The Add/Remove device IDs window opens.

3. Under **Schedules**, select a schedule to include in the monitor or under **Employees**, select the employees to monitor.

4. Click **OK**.
The Adherence Timebars monitor opens.

See Figure 78.
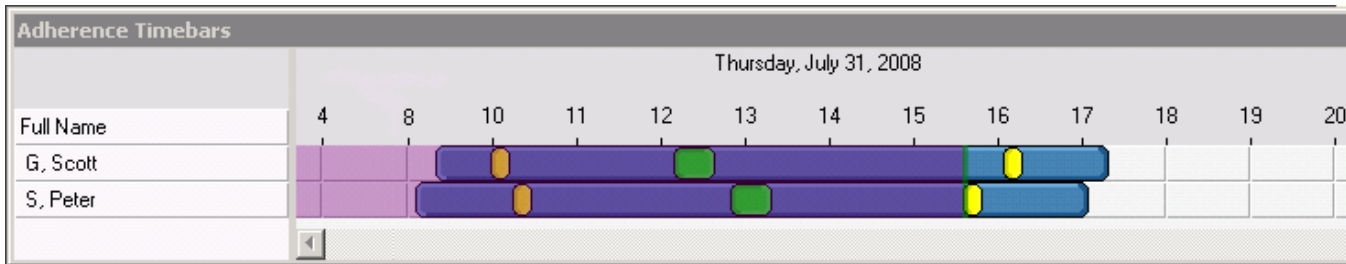
Figure 78: Adherence Timebars monitor

To alarm on schedule adherence in an Adherence Timebar monitor

1. Right-click anywhere in the monitor and click **Set alarms**.

2. Under **Performance variables**, select the variable you want to monitor.

3. Under **Alarm thresholds**, click **Add** and select a value for that variable you selected as well as the alarm notification options that will indicate when the variable exceeds those boundaries.
For more information on configuring monitor alarms, see "Setting alarms" on page 111.

4. If you want to add further alarms for the variable, repeat step 3.

5. If you want to add an alarm for another variable, repeat steps 2-5.

6. Click **OK** to save the alarms.

Employee State by Position/Time monitors

You can alarm on employees who are not adhering to schedules on the Employee State by Position/Time monitors using the Out of adherence performance variable. This variable measures the duration of time an employee is out of adherence, enabling more targeted alarming on the time and degrees for which an employee is out of adherence.

To set an adherence alarm on the Employee State by Position/Time monitors

1. Right-click an Employee State by Position/Time monitor and click **Set Alarms**.
   NOTE: You can select the Apply the alarm thresholds to all devices displayed on the monitor option to apply the threshold settings for performance variables across all employees. Alternatively, you can select Apply the alarm thresholds to a specific list of devices to apply the threshold settings for performance variables to a list of employees.
2. If you selected **Apply the alarm thresholds to a specific list of devices**, under **Devices**, select the employee(s) to which you want to apply the alarm thresholds.
3. Under **Performance variables**, select **Out of adherence**.
4. Under **Alarm threshold**, click **Add** and specify the boundary for alarming and set the options for the background color, font color, sound, pop-up, bring to front, and email.
5. To add an additional threshold for alarming, repeat step 4.
6. Click **OK**.

Alarming on schedule adherence

Supervisors can set alarms on adherence monitors in Contact Center Client to alarm on employee adherence by configuring an alarm in Contact Center Client using the Scheduled Performance Variable set to a specific value (such as unscheduled).

For example, in an adherence grid monitor, you could set an alarm on the Scheduled variable and set the value to Unscheduled and have it display as red, enabling you to clearly see when an employee is not adhering to the shift as expected.

You can alarm on the following performance variables in the adherence detail grid monitor:

- Out of adherence
- Scheduled
- Expected states
- Actual state
- Actual start
- Current Out of Adherence
- Total out of adherence
- Shift time
- % out of adherence

You can alarm on the following performance variables in the adherence timebars monitor:

- Shift Out of adherence
- Break Out of adherence
- Job Out of adherence

To alarm on schedule adherence

1. Right-click anywhere in the monitor and click **Set alarms**.

2. Under **Performance variables**, select the variable you want to monitor.]

3. Under **Alarm thresholds**, click **Add** and select a value for that variable you selected as well as the alarm type(s) that will indicate when the variable exceeds those boundaries.

4. For more information on configuring monitor alarms, see "Setting alarms" on page 111.

5. If you want to add further alarms for the variable, repeat step 3.

6. If you want to add an alarm for another variable, repeat steps 2-5.

7. Click **OK** to save the alarms.

RUNNING SCHEDULE ADHERENCE REPORTS

The Schedule Adherence reports are produced in Microsoft Excel format. You run and print the following Schedule Adherence reports from CCMWeb. For more information, see the Reports Guide appropriate to your MiContact Center Business licensing level.

You can produce on-demand reports and scheduled reports for the following reports:

- Employee and Employee Group Adherence Trace
- Employee Group Time Out of Adherence by Employee by Day of Week
- Employee Group Time Out of Adherence by Day of Month
- Employee Group Adherence by Period

Schedule Adherence reports are found in CCMWeb, under **Reporter=>Workforce Scheduling=>Schedule Adherence**.

EMPLOYEE PORTAL

Mitel Employee Portal enables employees to view and trade shifts online and request changes to schedules for time off, shifts, and availability. Employee Portal enables schedulers to view employee requests, perform what-if scenarios, quickly approve or deny requests, and automatically update schedules.

Access to Employee Portal features is dependent on your administrative-set security roles.

EMPLOYEE PORTAL AND EMPLOYEES

Using Employee Portal, employees can

- View their currently scheduled shifts and the shifts of other employees who share their schedule
- View messages from supervisors and employees and receive updates about the status of their requests on the home page
- Offer shifts to the bulletin board for other employees to take or trade
- Remove shifts from the bulletin board

- Propose to take shifts from the bulletin board
- Propose to trade shifts from the bulletin board
- Accept or reject employee proposals to take or trade your shift
- Request time off
- Request changes to your availability

The Employee Portal home page provides links to the bulletin board, view and offer your scheduled shifts for take or trade, view your pending offers, request time off, and request availability changes. Any Employee Portal alerts that require your attention also display on the home page. These include

- You have approved shift requests
- You have denied shift requests
- You have shift requests pending supervisor approval
- You have shift proposals pending your acceptance
- You have shift proposals pending acceptance or that have been rejected
- You have time off requests pending supervisor approval
- You have notes regarding your availability

If a home page alert is red, it requires your attention. Click View to view the alert and any employee or supervisor notes in detail.

Starting Employee Portal

To start Employee Portal

1. Open **Employee Portal**.
2. Type your **Username** and **Password**.
3. Click **Login**.

Creating a desktop shortcut to Employee Portal

To create a desktop shortcut to Employee Portal

1. Open **Employee Portal**.
2. Type your **Username** and **Password**.
3. Click **Login**.
4. Drag and drop the Employee Portal web address from the address bar to your computer desktop.

Viewing currently scheduled shifts

To view your currently scheduled shifts

1. In Employee Portal, click **My shifts**.
2. If you want to view shifts starting on a specific calendar day, select the start date from the calendar.
3. Optionally, to view the break and job details for a specific shift, under **Details**, click **Select**.

Viewing the shifts of other employees in your schedule

You can view the shifts for other employees in your schedule to help you determine potential shift swaps.

To view the shifts of other employees in your schedule

1. Click **My Schedules**.
2. To view shifts starting on a specific day, select the start date from the calendar.
3. Click **Select** next to the employee for which you want to view the shift.
   The break and job details for the shift display below.

Offering shifts for other employees to take or trade

You can offer shifts to the bulletin board for other employees to take or trade. You can remove shifts from the bulletin board at any time as long as no employees have proposed to take or trade the shift. Shifts that have already begun cannot be posted to the bulletin board for other employees to take or trade.

To offer a shift for other employees to take or trade

1. Click **Offer my shifts**.
2. Next to the shift you want to offer for other employees to take or trade, click **Select**.
   The shift details display.
3. Click **Continue**.
4. Optionally, type a note to accompany your offer.
5. Click **Submit**.

Removing shifts from the bulletin board

You can remove shifts from the bulletin board at any time as long as no employees have proposed to take or trade the shift. If a proposal has been made, you will need to reject it first before you can remove the shift from the bulletin board.

To remove a shift from the bulletin board

1. Click **My pending offers**.
2. Next to the shift you want to remove from the bulletin board, click **Select**.
   The shift details display.
3. Click **Continue**.
   The shift offer is removed from the bulletin board.

Proposing to take shifts

To propose to take a shift

1. Click **Bulletin board**.
2. Next to the shift you want to take, click **Select**.
   The shift details display.
3. Click **Continue**.

4. Click **Next**.

5. Optionally, add a note to accompany your proposal.

6. Click **Next**.

7. Click **Submit**.

Proposing to trade shifts

To propose to trade a shift

1. Click **Bulletin board**.

2. Next to the shift you want to take, click **Select**.
   The shift details display.

3. Next to the shift you want to propose for trade, click **Select**.

4. Optionally, add a note to accompany your proposal.

5. Click **Next**.

6. Click **Submit**.

Accept or reject an employee proposal to take or trade your shift

To accept or reject an employee proposal to take or trade your shift

1. On the Employee Portal home page, next to **You have <#> shift proposals pending your acceptance**, click **View**.
   The Proposals window displays.

2. Next to the proposal you want to view, click **Select**.
   The proposal details display with any relevant employee notes.

3. Click **Accept** to accept the proposed shift change. Otherwise, click **Reject** to reject the proposed shift change.

Requesting time off

To request time off

1. Click **Request time off**.
   The Request time off window displays, including a list of any time off you have already scheduled.

2. Click **Request time off**.

3. Select a time off type from the list.

4. Click **Next**.

5. Specify the time off start and end times.

6. Click **Next**.

7. Optionally, add a note to accompany the time off request.

8. Click **Next**.
   The time off request summary displays.

9. Click **Submit**.

Requesting availability changes

NOTE: You can click Clear request at any time to reset the Request availability change window to your currently configured availability.

To request an availability change

1. Click **Request availability change**.
   The Request availability change window displays with your current availability.

2. If you need to change existing availability, under **Update current availability**, select a day of the week and click **Remove**. Otherwise, continue to step 3.

3. Under **Change availability**, specify the dates and times you are available to work.

   - After **Day of week**, specify the day of week you are available.

   - If you are only available during certain hours, select **Part of the day,** and specify the times at which you are available.

   - If you are available to work at any time during the day, select **Full day**.

4. Click **Add** to add the new availability to the request.

5. You can optionally select a currently configured availability day or time in the **Update current availability list** and click **Remove** to remove it from the list.
   NOTE: The Add button is for adding new availability to the Update current availability list only and not for replacing specific dates and times from the currently configured availability list.

6. Optionally, under **Employee note**, add a note to accompany your request.

7. Click **Accept**.
   The Confirm availability change window displays.

8. Specify the date that your requested availability will take effect.

9. Click **Submit**.

EMPLOYEE PORTAL AND SUPERVISORS

Using Employee Portal, supervisors can

- View employee scheduling requests

- Preview the effect of approving or denying employee shift change requests

- Approve or deny employee proposals to take or trade shifts

- Approve or deny employee requests for time off

- Approve or deny employee requests for availability changes

Handling employee scheduling requests

NOTE: If you attempt to approve an employee's request for time off for a period where a schedule has yet to be built, time off will not be decremented properly and the time off will be entered as an unavailable event in the schedule.

To view, approve, or deny employee scheduling requests

1. Open **Workforce Scheduling**.

2. Log on to Workforce Scheduling.

3. Load an active schedule.

4. Click the **Employee Portal** tab.

5. Click the **Request mode** icon.

6. In the details pane, click the **Shift changes**, **Time off**, and **Availability** tabs to view any employee scheduling requests pending your approval.

7. Next to **Approve**, click the **+** to view the scheduling request details.

8. If you are viewing the Shift change tab, click **View timebar** to view the scheduled shift.

9. In the Employee requests group, click **Preview** to view the effect of approving the request.

10. In the Employee requests group,

   - Click **Approve** to approve the request.
   - Click **Deny** to deny the request.

   The schedule is automatically updated and employees are notified of the schedule request status.

RUNNING EMPLOYEE PORTAL REPORTS

The Employee Portal reports are produced in Microsoft Excel format. You run and print the following Employee Portal reports from CCMWeb. For more information, see the Reports Guide appropriate to your MiContact Center Business licensing level.

The following reports are available with Employee Portal:

- Employee Portal Availability Requests
- Employee Portal Time Off Requests
- Employee Portal Shift Requests
- Employee Portal Shift Change Status

Employee Portal reports are found in the CCMWeb, under **Reporter=>Workforce Scheduling=>Employee Portal**.

POSTING FEEDBACK AND VIEWING OUR FORUMS

Mitel has partnered with UserVoice, a third-party service, to host customer suggestions on https://micontactcenter.uservoice.com. When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Our forums enable you to send feedback directly to the people building the product. While we cannot comment on every suggestion, feedback is analyzed and considered for future releases.

NOTE: Please do not use the forums to submit product defects. To submit product defects, please contact your administrator or dealer.

Feedback can also be submitted directly to Mitel without posting the suggestion on the forums. For more general feedback, you can also provide a rating of your experience with MiContact Center Business.

NOTE: Please do not use feedback for requesting customer assistance. For assistance with MiContact Center Business, please contact your dealer or Mitel Customer Support.

To post feedback and view our forums

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Got an idea? Tell us**.
   OR

   Access the following URL: **https://micontactcenter.uservoice.com.**

To submit feedback directly

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Contact Us**.

To rate your Mitel experience

1. In YourSite Explorer, click **File=>Feedback**.
2. Click **Rate us**.

TERMS AND DEFINITIONS

This section includes terms that may not be applicable to your software licensing level.

Abandoned call

An abandoned call is a call that the caller ends before the call is answered.

Account Code

Account Codes are classifiers that can be applied to call records and used to identify unique attributes about the caller or call for individual departments, projects, or services to generate reports on them. As well, they can be used by agents as classification codes for incoming calls. Account codes can be verified, non-verified, fixed length, or forced.

See Classification Codes, Fixed Length Account Codes, Forced Account Codes, Non-Verified Account Codes, Verified Account Codes.

ACD (Automatic Call Distribution)

ACD (Automatic Call Distribution) is a call distribution mechanism that distributes calls to a pool of available queue members.

ACD (state)

ACD is a state applied to a queue member while they are handling an ACD call.

ACD calls handled

See Calls Handled.

ACD calls interflowed

See Interflowed.

ACD calls offered

See Calls offered.

ACD calls requeued

See Calls requeued.

ACD handling time

ACD handling time is a parameter for MiContact Center Business that provides the sum of all events from answer to hang up of an ACD call.

ACD path

An ACD path is a predefined route that a call follows before reaching an agent. ACD paths direct callers to the agents or agent groups best suited to handle the calls. For example, a contact center can have an ACD path for sales, which routes callers to the agents taking sales orders.

Active Directory

Active Directory is a directory service created by Microsoft that is used for managing a domain. In MiContact Center Business, Active Directory is synchronized with YourSite Explorer to align Active Directory security groups and users with MiContact Center Business employees and employee groups within selected organizational units.

Agent

An agent is a contact center employee, assigned an Agent ID, who receives calls routed to ACD paths.

Agents available

Agents available is a real-time statistic indicating the current number of agents who are logged in and not in Make Busy or Do Not Disturb. If an agent is configured as a part of an agent group and is logged in, the agent is counted as available, even if they are not present in that agent group. This statistic can be used as a queue condition in IVR Routing.

ANI (Automatic Number Identification)

ANI (Automatic Number Identification) is a service that provides receivers of telephone calls with the caller information. ANI can be used to create screen pops for agents or to route calls by caller phone numbers.

Answered by

Answered by is the real-time name for the number of calls answered by the first, second, third, and fourth answer points

Answering points

An answering point is a single point of communication available to callers where they can contact a contact center, such as a queue, voice mail, or extension.

ASA

See Average Speed of Answer

Average Speed of Answer

Average speed of answer (ASA) is an ACD statistic that measures how long the average caller waits on hold before the call is picked up by a queue member (including time in queue and ringing time).

Average abandon time

The average abandon time is the average number of seconds callers wait in queue before they abandon a call.

Blocked call

A blocked call is a call that is unable to get into the contact center's telephone system because there are no trunks available. The caller receives a busy signal.

Busy hour

Busy hour is a statistic that highlights the busiest hour of operation of a business day.

Call abandoned parameter

The Call abandoned parameter is a queue configuration that defines short abandoned calls, determining what abandoned calls are included as abandoned in call statistics. The default the short abandon is configured at 6 seconds.

Call routing

Call routing is the set of instructions configured in MiContact Center Business to automate the movement of calls to their intended answering points.

Call type

Call type categorizes calls queue members receive, enabling them to be looked up in SMDR Inspector. Call types include ACD or Non ACD, abandoned, interflowed, requeued, unavailable, or outbound.

Callback

Callback is an optional feature of telephone systems that enables callers who are unable to reach an agent in a contact center to be called back by the contact center. MiContact Center Business and IVR Routing offer several methods of providing callbacks, including Call me back, voice callbacks, web callbacks, and abandon callbacks.

Calls abandoned

Calls abandoned is a report field detailing the total number of calls that abandoned in queue or while the phone was still ringing at an extension. Calls abandoned ignores calls that were abandoned before the short abandoned parameter had been passed.

See Abandoned calls.

Calls abandoned (long)

Calls abandoned (long) are abandoned calls where the caller hung up after the short abandon parameter had been passed. By default, the short abandon is configured to be 6 seconds.

Calls abandoned (short)

Calls abandoned (short) are abandoned calls where the caller hung up before the short abandon parameter had been passed and are not included in the call statistics.

Calls answered

See Calls handled.

Calls handled

A handled call is a call that has been picked up answered by a queue member. A call that listens to in-queue RAD messages is not considered handled until it is answered by a queue member.

Calls interflowed

See Interflowed.

Calls offered

1) Calls offered are all calls received, regardless of how they are handled or routed, including calls handled and both short and long abandoned calls.

2) Calls offered is a forecasting parameter used to determine the queue member requirement for a contact center's Service Level percent and Service Level time targets through applying the Erlang C equation to the estimated Call Load and average ACD Handling Time.

Calls requeued

Requeued calls are all calls replaced back into the same queue and offered to another agent when an agent receives an ACD call and fails to answer it after a pre-configured duration or number of rings.

Calls waiting

Calls waiting is the number of callers in a queue waiting for a queue member to become available, including those listening to Music on hold or queue announcements.

Camp on

Camp on is a notification tool that enables callers to notify an employee, who is currently on a call, that they are waiting to be answered. The employee is notified by a series of audible beeps.

Classification codes

Classification codes are classifiers appended to calls to categorize them, enabling reporting to examine specific categories of calls, such as those relating to specific products or services.

Clustered environment

A clustered environment is a network environment where multiple telephone systems are linked together to function as a single system.

Computer Telephony Integration

Computer Telephony Integration (CTI) are technologies that merge computer functions and telephone systems, enabling PC-based telephone systems to deliver functions such as synchronized voice and data delivery, voice and data conferencing, automatic information retrieval for calls, caller-based messaging and routing, and desktop productivity tools.

CTI

See Computer Telephony Integration

Customer Relationship Management

Customer Relationship Management (CRM) is a model for customer management that relies on technology to streamline and manage interactions with customers.

Date stamp

See Date/Time stamp.

Date/Time stamp

A date/time stamp is an indicator attached to a record or statistic detailing when it was created.

Delayed call

A delayed call is a call placed in the ACD queue because it cannot be immediately answered by a queue member. The ACD queue allows the client to wait for an available member rather than blocking the client from entering the system.

Dialable number

The dialable number is a digit or series of digits dialed by a caller to reach an answering point, such as a queue member, an extension, a queue, or voice mail.

Dialed Number Identification Service (DNIS)

Dialed Number Identification Service (DNIS) is a telecommunication service that identifies the phone numbers dialed by inbound callers. DNIS can be used to route calls, enabling contact centers managing multiple product lines or businesses to direct calls to the appropriate endpoint.

Division

A division is a grouping of several employee or extension groups that enable a single report to be run for several groups simultaneously.

DND

See Do Not Disturb (state).

DNIS

See Dialed Number Identification Service.

Do Not Disturb (state)

Do Not Disturb (DND) is a state that prevents queue members from receiving inbound interactions and transfers. For agents, Do Not Disturb is an employee-level configuration. When an employee is in Do Not Disturb, they enter Do Not Disturb across all agent capabilities.

Employee

An employee is a person who is employed by an organization and configured as an employee in MiContact Center Business so that they have access to MiContact Center Business applications and may have their associated devices reported on.

Enterprise

An enterprise is both the single site where the Enterprise Server is installed and all the connected branch offices that comprise a company.

Enterprise Server

The Enterprise Server is the central server upon which MiContact Center Business is installed and from which MiContact Center Business runs.

Erlang

An Erlang is a unit of measure for telephone traffic equal to one hour or 3,600 seconds of telephone interaction, such as a single call lasting one hour or six calls lasting 10 minutes.

Erlang B

Erlang B is an equation used to estimate the number of trunks required by a contact center.

Erlang C

Erlang C is a forecasting equation that uses historical Call Load data, Service Level Percentage, Service Level Time, and Wrap up Time Used to predict the resources required to keep wait times within a contact center 's Service Level objective for the time interval and data range selected in a forecast.

External Hot Desking Agent

See Hot Desking Agent.

Extension

An extension is an endpoint for answering calls. Extensions can be assigned to Ring Groups, or can be logged into by agents.

Fixed Length Account Codes

Fixed Length Account Codes are verified and non-verified Account Codes that are automatically submitted to the system when the correct number of digits has been entered.

Forced Account Codes

Forced Account Codes are verified and non-verified account codes that must be entered at a specific time in a call. Forced verified account codes must be entered as soon as the phone is off the hook. Forced non-verified Account Codes must be entered after the phone number is dialed. Systems may be configured to avoid the requirement of entering a forced non-verified Account Code when making a call that must not be charged (for example, dialing a leading digit such as 8 to make a call without entering an Account Code and dialing a leading digit such as 9 to make a call that requires an Account Code).

Grade of service

The grade of service (GOS) is a measure of the likelihood of an attempted call receiving a busy signal. GOS compares the number of trunks to the level of traffic and expresses the result as a decimal fraction. A GOS of P.02, for example, indicates that a caller would have a two percent chance of receiving a busy signal.

Handled by

Handled by is the real-time statistic for the number of calls answered by the first, second, third, and fourth answer points.

Handled %

Handled % is the real-time statistic comparing the calls handled to the calls offered.

Handling time

Handling time is the measure of how long a call took to be handled by a queue member, from when the call is answered when the call is finished. Handling time includes talk time, hold time, as well as transfers and conferences on the call.

Hot Desking Agent

Hot Desking Agents are employees configured with a Hot Desking Agent ID that enables them to sit at any extension in a network and log on to that extension with all their regular work settings available. External Hot Desking Agents can hot desk remotely using any phone or headset.

Hunt group

A hunt group is a series of telephone lines grouped by the telephone system that rotates incoming calls through the lines until an available line is found and the caller is connected.

Inbound

Inbound is a descriptive term applied to forms of interaction or communication, such as a phone call, to indicate that it is being sent to a contact center from an external source.

Inbound calls

See Inbound.

Interflowed

Interflow is a mechanism that redirects interactions from queues to alternate answering points (for example, to another queue or to voicemail). Interflow statistics include interactions manually transferred from one queue to another. Interactions routed from queues to other answering points before the Short Abandon time are not included in Interflow statistics.

Interactive Voice Response

Interactive Voice Response (IVR) is a technology that enables callers to interact with a contact center's phone system by pressing keys or speech recognition while following IVR dialog.

Internal calls

Internal calls are calls made from within a system to other answering points within the same system.

LAN

A Local Area Network (LAN) connects multiple computers together over short distances. LANs typically operate within a building. The computers share information, applications, and peripherals, such as printers.

Logged on

Logged on is an agent state applied to agents who have signed into the ACD system.

Logged off

Logged off is an agent state applied to agents who have signed out of the ACD system.

Longest waiting

Longest waiting is the duration, in minutes and seconds, of the call that has been waiting the longest in queue.

Make Busy (state)

Make Busy is an agent presence state applied to prevent an agent who is busy from receiving ACD calls. Agents in Make Busy are able to receive Non ACD calls. Make Busy is an employee-level configuration. When an employee is in Make Busy, they enter Make Busy across all agent capabilities.

Media servers

A media server is a server or system, such as a telephone system, used to organize and distribute communications throughout a contact center.

MiTAI

MiTAI is a Mitel implementation of TAPI that is used to connect the telephone system/PCs running windows to external applications, such as ACD controllers.

Mitel OPS Manager

Mitel OPS Manager is a Mitel software application that provides network-wide administration and maintenance for MiVoice Business and 3300 Network Elements or Nodes.

Non ACD (state)

Non ACD is a state applied to queue members involved in an incoming personal contact, a member-originated call, or a call dialed directly to their extension.

Non-verified Account Codes

Non-verified Account Codes are numbers entered onto the SMDR record for billing and call management. During a call, non-verified Account Codes can be entered as often as required.

Outbound calls

Outbound calls are calls made from within a contact center to external answering points.

Overflow

Overflow is a call distribution mechanism that queues calls against two or more agent groups to limit the delay faced by callers. If a call in an ACD queue is not answered after the configured Overflow time, then it is placed into the queue of a second agent group in addition to the first queue.

PBX

See Telephone system.

Pooling principle

The pooling principle refers to the increased contact center efficiency gained by consolidating contact center resources.

Port

A port is a communications endpoint in MiContact Center Business used to link services.

Probability of delay

The probability of delay is a statistic that measures the likelihood of a call being delayed in the ACD queue, comparing the number of queue members to the level of traffic carried by the trunks.

PSTN

See Public Switched Telephone Network.

Public Switched Telephone Network (PSTN)

The Public Switched Telephone Network is a global collection of Central Offices (CO) interconnected by long distance telephone switching systems.

Quality of service

Quality of service is a reflection of an agent's ability to provide excellent assistance to each customer. Quality of service can be evaluated and managed through silent monitoring systems, IT support systems, CTI, ANI, and DNIS.

Queue number

A queue number is the address of a queue or other answering point used in the telephone system. The programming associated with the queue number defines the routing and timing options available to the call.

Queue member

A queue member is an individual answering for the queue. For ACD paths, 'members' refers to agents in the queue's answering agent groups. For Ring Groups, 'members' refers to the extensions assigned to the queue's Ring Groups.

Queue unavailable

1) Queue unavailable is a routing option that reroutes calls to an unavailable answer point/overflow point. Queues are unavailable when the call enters the system outside business hours, when all queue members have removed their presence, when all queue members are in DND, or when the queue has been placed in DND. Calls interflowed before the Short Abandon time are included in Queue Unavailable statistics.

2) Queue unavailable is a real-time statistic that counts how many calls were re-rerouted to other queues due to the queue being unavailable.

RAD

See Recorded Announcement Device.

Readerboard

See Wall sign.

Real-time adherence

Adherence refers to whether or not agents are performing the activities for which they are scheduled. Workforce management tools enable supervisors to be notified of discrepancies between agents' work schedules and the actual activities they perform.

Reason Code

Reason codes are descriptive classifiers applied to Make Busy and Do Not Disturb states to provide more detailed information as to why the queue member applied the code.

Recorded Announcement Device

Recorded Announcement Device is an IVR Routing feature that provides prerecorded messages to callers waiting in the ACD queue.

Reporting number

A reporting number is the unique number assigned by the system to contact center resources for reporting purposes.

Ring Group

A Ring Group is a collection of extensions, or a single dialing point for a collection of extensions, in a business. Ring Groups are typically used to reach back office extensions. For example, a business with agents taking sales orders may also have several phone extensions in the warehouse. These warehouse phone extensions are compiled into a Ring Group, which can be reached via a single dialing point.

Service Level percent

The Service Level percent is the number of calls that are handled, abandoned, and interflowed before the Service Level time, compared to the total number of calls handled, abandoned, and interflowed.

Service Level time

The Service Level time is the specified time used in calculating the queue service objective in conjunction with the Service level percent, such as 80% (Service Level percent) of interactions answered within 120 seconds (Service Level time).

Silent monitoring

Silent monitoring is a MiContact Center Business feature that facilitates the tracking of agent call handling techniques by enabling supervisors to listen to the voice interactions of internal or external calls between agents and callers.

Site

A site is a physical location of a contact center with one or more media servers. It may be the same location where the Enterprise Server is installed or a branch office.

Spectrum

Spectrum is a reporting feature configured for queues that provides a frequency distribution of calls abandoned, answered, or interflowed based on a defined time scale.

SQL

SQL is a standard query language used to enter, query, and change data in a database, as well as create and administer databases. Administration of YourSite Explorer is done using Microsoft's SQL Server.

Subroutines

Subroutines are portions of workflows that can be reused in multiple workflows.

Talk time

Talk time is the measure of the time an agent spends talking to callers, excluding time spent on hold.

TCP/IP

TCP/IP is the basic communication protocol of the Internet and is used as a communication protocol in private networks (intranets).

Telephone system

A telephone system is a private branch exchange (PBX) or business telephone switch used to process incoming and outgoing calls to a contact center.

Time to answer

Time to answer is the measure, in seconds, of how long an incoming call remained in queue before it was answered. It is primarily used as an SMDR data mining criteria.

Time stamp

See Date/Time stamp.

True talk time

See Talk Time.

Trunk

A trunk is a communication line between two telephone systems.

Trunk load

Trunk load is the duration of time from when a trunk receives a call to when the queue member finishes handling the call and disconnects. Trunk load does not include Wrap Up Time.

Unavailable

Unavailable is an agent and employee state real-time column in Contact Center Client that includes agents unavailable to take calls due to being in Do Not Disturb, Make Busy, Work Timer, Reseize Timer, or Unknown.

Updated Position in Queue (UPiQ)

Updated Position in Queue (UPiQ) is a notification feature that provides messages to callers informing them of their position in queue and keeps them informed of their position if it changes, at preset intervals.

UPiQ

See Updated Position in Queue.

Verified Account Codes

Verified Account Codes are numbers entered before making a call to change the Class of Service or Class of Restriction at the station. When the call ends, the station returns to normal. Verified Account Codes can be tracked with SMDR for long-distance billing purposes and may be reported in Internal SMDR logs.

Wall board

See Wall sign.

Wall sign

A wall sign is an electronic sign used to display real-time ACD statistics to employees in a contact center.

WAN

Wide Area Network (WAN) connects multiple computers over a wide geographic area. WANs operate over telephone carrier lines through bridges or routers. Router options enable communication between high speed LAN links and slower speed WAN links, which tie LAN segments together.

Whisper Coach

Whisper Coach is a silent monitor feature that enables supervisors to converse with and coach agents handling calls without callers hearing the supervisor.

Workflow

Workflows are programed pathways in IVR Routing and Multimedia Contact Center, which control how interactions are routed to queue members.

Workforce management

Workforce management is the scheduling of contact center agents to meet forecasted resource requirements and the managing of agents to ensure they adhere to their scheduled activities.

Wrap Up Time

Wrap Up Time is a real-time and reporting statistic detailing the total time an agent spends in the Work Timer state.