Documentation

OpenScape Xpressions V6
ACD Supervisor

User Guide

A31003-S2360-U119-3-7619

Communication for the open minded

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1 Multimedia Contact Center

The Multimedia Contact Center offers you a professional communication interface to your customers. It is the ideal tool to quickly and efficiently respond to calls, fax messages, e-mail and web enquiries. The following client applications are available for the Multimedia Contact Center:

ACD Supervisor

With the ACD Supervisor described in this manual the contact center supervisor can:

- monitor the contact center activities.
- create and administer agents and groups.
- distribute calls and messages. This is possible, for example, by groups, skills, time profiles or via skill-based routing.
- specifying waiting loops.
- plan and create campaigns.
- use an extended setup wizard for ACD groups, skills, agents and time profiles.
- view reports about agent statuses, service level, waiting loops and agent groups in real time.
- freely define and create reports.
- view the information he/she needs in any number of display windows.
- use a simplified layout configuration via drag&drop.
- use a rule wizard to define threshold actions.
- set the alarm display audio-visually.
- create statistics concerning all contact center activity.
- generate client-specific reports with ODBC/SQC-compatible report generating programs.
- design a more efficient personnel planing by performance analysis in realtime.

optiClient/ACD Agent module

A module for ACD agents is integrated in optiClient. This module is a user-friendly software application, allowing you (the contact center agent) to perform the following tasks on your computer:

- logging on or off at the contact center.

- receiving and making calls (CTI – Computer Telephony Integration).
- changing your current agent state.
- viewing the number of incoming calls and messages.
- initiating a campaign call with a mouse click.
- logging in for calls, messages and campaigns separately.
- disposing of online help features.

optiClient

optiClient is the software variant of a smart telephone allowing you as contact center agent to perform the following tasks on your computer:

- receiving and making calls.
- forwarding calls.
- monitoring telephones from your ACD group.
- viewing all incoming and outgoing calls.

Communications

Communications is a powerful communication tool allowing you to send and receive messages (e-mail, fax, voice, and SMS messages). If you have administrative rights you may also use Communications to set up and manage agents, groups and skills. In addition, a module for ACD agents is integrated the functional range of which corresponds to the above optiClient module.

1.1 Who should read this Manual?

This manual addresses all contact center supervisors who want to familiarize themselves with the ACD Supervisor. The following pages will show and explain all ACD Supervisor features step-by-step.

For further information on the other client applications please refer to the corresponding manuals.

1.2 Installation

1.2.1 System Requirements for the ACD Supervisor

To operate the ACD Supervisor client program you need:

- a computer with at least an Intel Pentium or faster processor.
- an operating system approved for clients in the release notice;
- a PBX, certified by Siemens Enterprise Communications GmbH & Co. KG for CTI applications, with corresponding connection to an XPR server.
- The XPR server must be configured and available as contact center server.

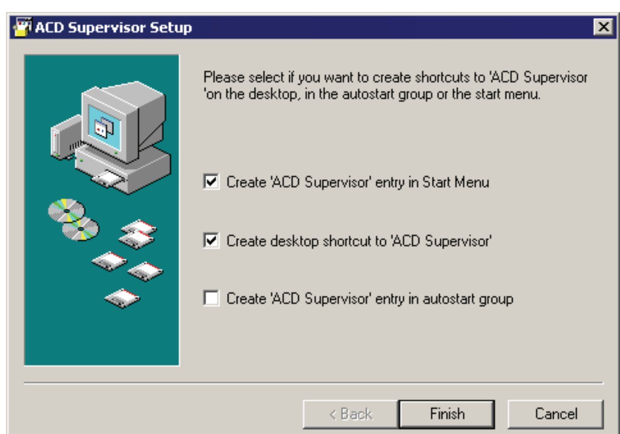
1.2.2 Starting the Installation Routine

With the setup the ACD Supervisor program files are first installed and, if not available yet, the Service Provider then as well.

The ACD Supervisor installation routine begins with a welcome dialog. Read the information in this dialog carefully and start the actual installation with the **Next** button. Follow the instructions given in the single dialogs.

After running through all installation steps you can decide in a final window whether and where shortcuts are to be created.

Depending on the set check box, a shortcut is inserted in the start menu, on the desktop or in the autostart group. You can select an arbitrary combination of options. If you do not wish to create shortcuts, deactivate all checkboxes.



Click **Finish** to accomplish the installation.

2 The ACD Supervisor

ACD Supervisor is a program for generating online information on current events within a contact center. As a Windows-based application the program has a user-friendly interface and supports the contact center supervisor in routine processes during contact center operations as well as in quickly managing resources at times of high call volume. ACD Supervisor is a powerful operating and control interface for call center solutions using the Unified Messaging Communication Server.

To ensure a flexible call distribution control as well as for monitoring all resources, the program supports the contact center supervisor with numerous features. Evaluations are performed in realtime, in other words any change in current events can be dynamically displayed. All contact center resources, whether human or technical, can be monitored in freely configurable windows. In addition, a contact center supervisor can have dynamic (current) and statistical data on the corresponding resources displayed in different windows. Resources include all agents of a contact center as well as the groups they belong to, external lines, waiting loops and campaigns. If a deviation from the desired process has been noticed, the supervisor can make rapid changes to running operations. He/she can use numerous options to define thresholds so that certain actions are performed when these values are exceeded. Features assigned to the supervisor are accessed and selected via a password-protected login.

The following overview shows the most important ACD Supervisor features:

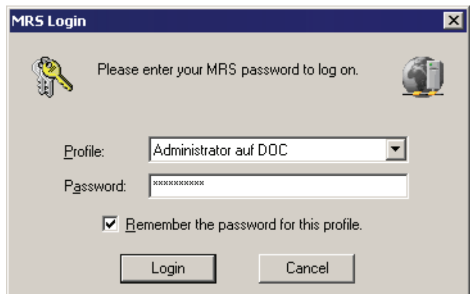
- Monitoring technical and human contact center resources (agents, groups, waiting loops, external lines, campaigns)
- Display of statistic and real-time information
- Freely configurable monitor displays for resources
- Contact center threshold control
- Alarm definition (visual and acoustic notification)
- Campaign administration
- Assignment of additional agents when bottlenecks occur
- Agent status alterations (logged in, ready, ...)

3 How to start the ACD Supervisor

To start the ACD Supervisor proceed as follows:

- Click the **Start** button and select the **ACD Supervisor entry** or
- click the **ACD Supervisor** icon on your desktop.

The ACD Supervisor will then be started. But before you can commence using the ACD Supervisor, you have to log on to the contact center server. The following login dialog appears.



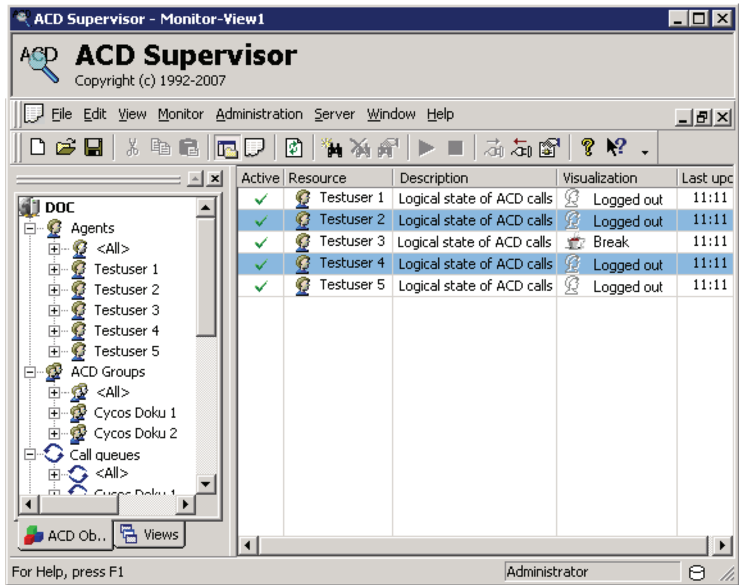
Select your profile from the **Profile** list and enter the corresponding password in the **Password** field. You will receive a profile and password from your network administrator.

NOTE: Login is more convenient when you activate the **Remember the password for this profile** option. You do not have to enter your password again next time you log in. But please note that everyone who has access to your computer may use this profile then. Therefore, lock your computer when you leave your workplace or use a screen saver with password option.

Click the **Login** button afterwards. You can now access the ACD Supervisor.

4 The ACD Supervisor User Interface

The user interface of the ACD Supervisor comprises the following parts:



Monitor area

The monitor area is the actual display area of the ACD Supervisor. You can use the monitor area to define different monitor windows which will supply you with current contact center data. The monitor views allow you to monitor and control all contact center activities by means of the variables and ACD objects you selected.

Workspace

The workspace consists of two tabs. **ACD Objects** holds all contact center objects ready that can be supervised. You select the objects from this tab and have them displayed in the monitor area. **Views** offers you quick access to the different active monitor views.

NOTE: If the workspace is not visible, activate the entry **Workspace** in the **View** menu. The workspace will then be displayed.

The workspace window has a double bar at its upper edge. You may click this double bar with your mouse and position the window freely on your desktop. Possible anchor points on the workspace are indicated by a window frame appearing in the respective place. It is also possible to position the window within the workspace.

Toolbar

The toolbar has some icons which can be clicked to execute frequently used commands. To see which features the icons perform, position the mouse pointer on the respective icon and leave it there for a short time. A concise description will be displayed (also called tooltip).

Menu bar

The menu bar contains all menus and commands that you need for using the ACD Supervisor. The menu bar can be positioned freely. Please note that the menu bar may contain different menus depending on the windows used in the current layout.

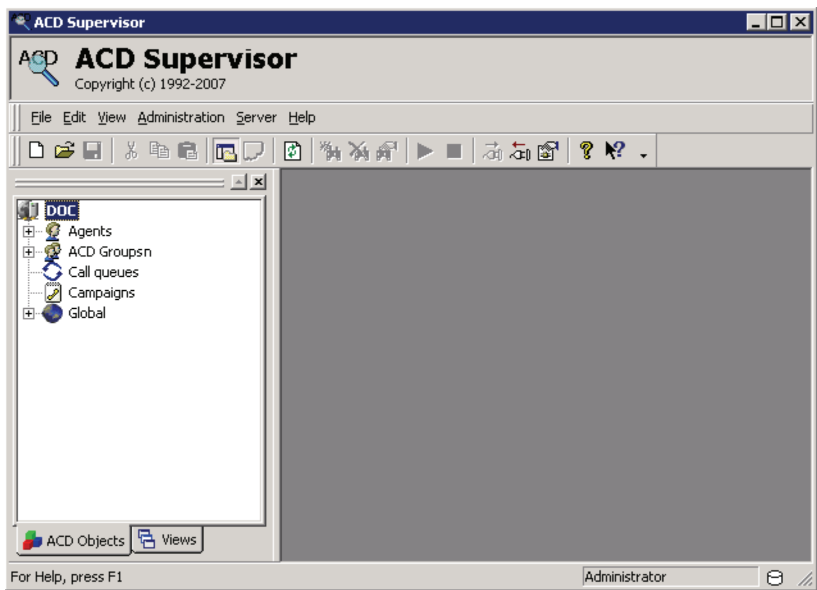
The following chapters will show you all basic ACD Supervisor features.

5 First Steps

After you have started the ACD Supervisor and familiarized yourself with the user interface, the following chapter will give you some basic instructions on how to monitor contact center activities.

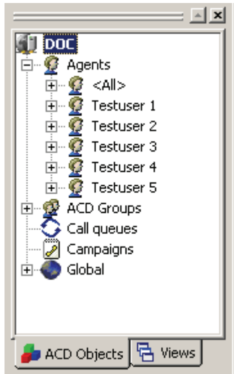
NOTE: For the following example a small contact center with five ACD agents and two ACD groups has been established. For more information on how to set up agents and groups please refer to Chapter 7, “How to set up a Contact Center”.

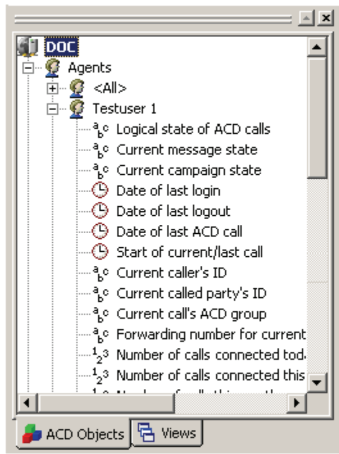
The monitor area is empty when you start the program for the first time. The workspace contains already some ACD objects that you can monitor, e.g. agents, ACD groups, campaigns etc.



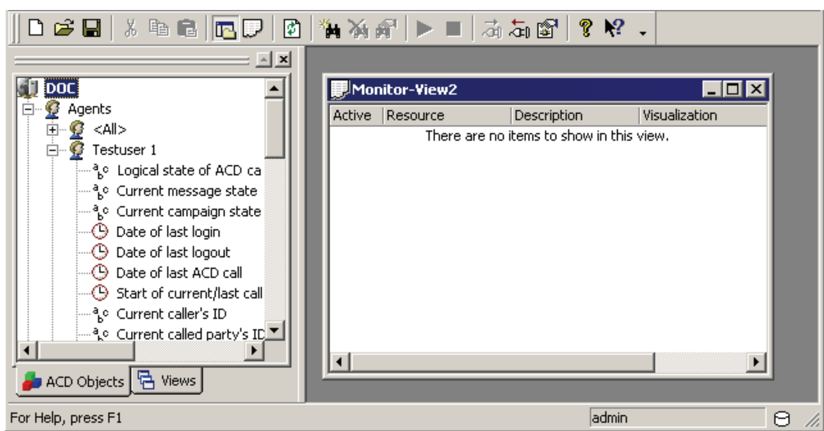
When you click the + symbol preceding an object, it will be expanded, i.e. all entries will be displayed.

When you click the + symbol preceding the Agents item, all set up agents will be displayed. A click on the + symbol preceding an agent displays all variables of the agent that can be monitored.

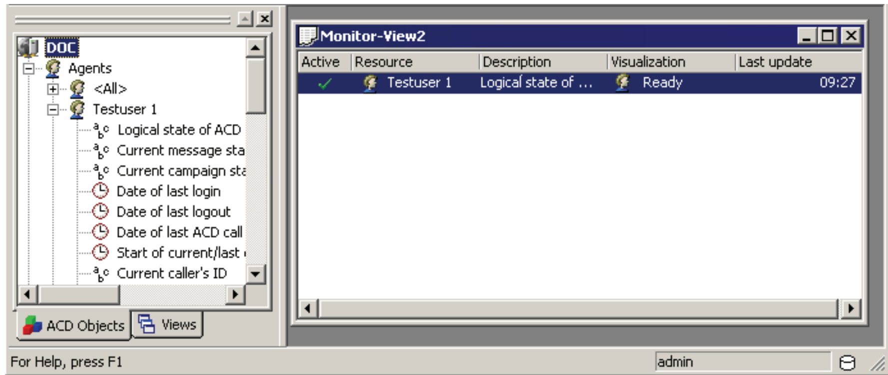




To monitor these variables you have to open a new monitor configuration. Click **New** in the **File** menu. The following monitor window will open in the monitor area:

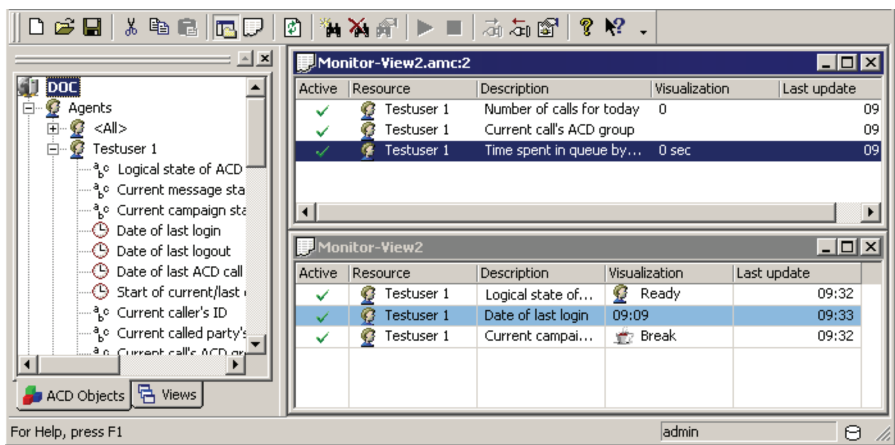


Just drag&drop a variable of the agent from the workspace onto this monitor window, e.g. the current call status of the agent.



You may add and monitor as many variables from the workspace onto this window as you like. You may position the monitor window freely within the monitor area and you may minimize or maximize it.

To add a further window to the monitor configuration, click **New Window** in the **Window** menu.

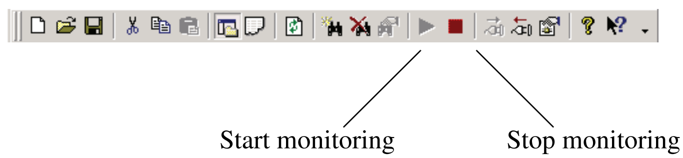


You may save this new monitor configuration with two monitor windows by clicking **Save** in the **File** menu.

Start/stop monitoring

NOTE: You find an overview of all variables that can be monitored in Section A.1, “The monitorable Variables of a Contact Center”.

The system monitoring starts automatically upon the ACD Supervisor start by default. The automatic startup can be stopped by changing the ACD Supervisor settings. See Section 13.1, “General Settings”. After this alteration you can use the corresponding buttons on the toolbar to start or stop the system monitoring. If you disable the monitoring, the system will not be monitored any more and the state at the time of your stopping it will be “frozen”.

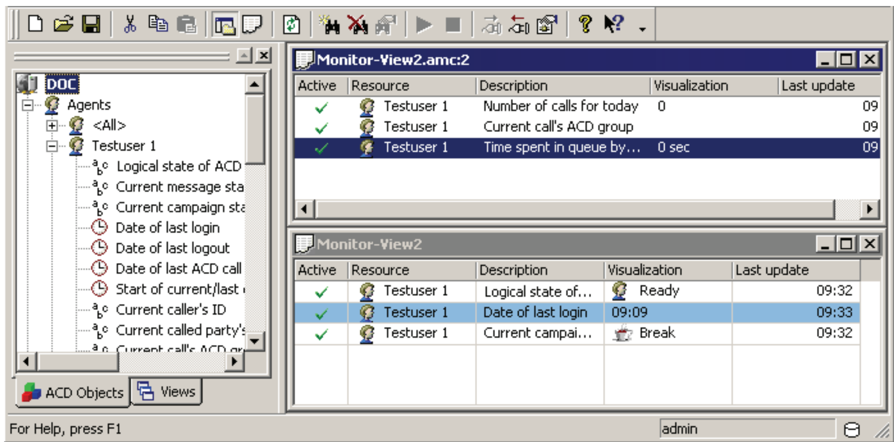


You find further information on how to set up and edit monitor configurations in Chapter 6, “How to set up and edit Monitor Configurations”.

6 How to set up and edit Monitor Configurations

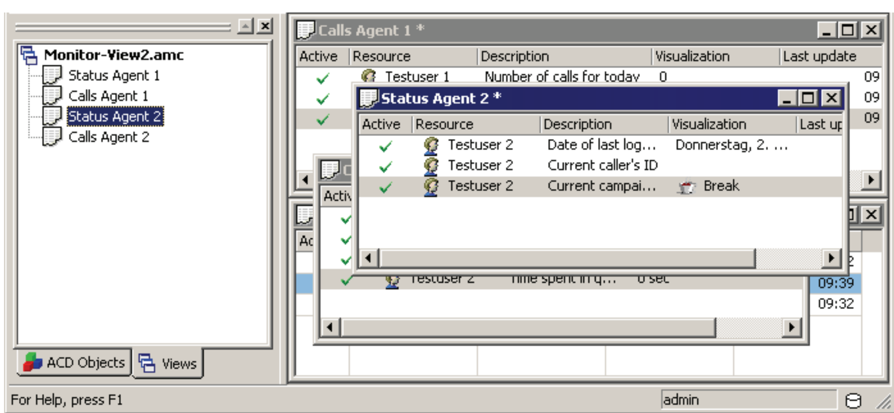
As already described in Chapter 5, “First Steps”, the monitor area is the actual display area of the ACD Supervisor. You can use the monitor area to define different monitor windows which will supply you with current contact center data. The monitor windows are used to monitor and control the activities of the contact center by means of the selected variables and ACD objects. The number of open monitor windows is basically not limited, i.e. you may add as many monitor windows as you like.

All monitor windows together are referred to as *monitor configuration*. The following figure shows a simple monitor configuration:

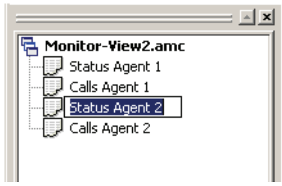


A monitor configuration consists of at least one, usually several, monitor windows in which the variables of the different ACD objects are be displayed. You may save a monitor configuration under a specific name and open it whenever the need arises. However, only one configuration can be displayed at a time. By default, the last configuration used under the login profile is called upon the program start.

If you open several monitor windows and a window may be obstructed by another one, the **Views** tab will help you not to loose track of the windows.



The tree structure on the workspace shows you all windows of the current configuration. A click activates the corresponding window. Here you can also change the name of a window. Click in the respective entry to modify it:



6.1 Setting up new Monitor Configurations

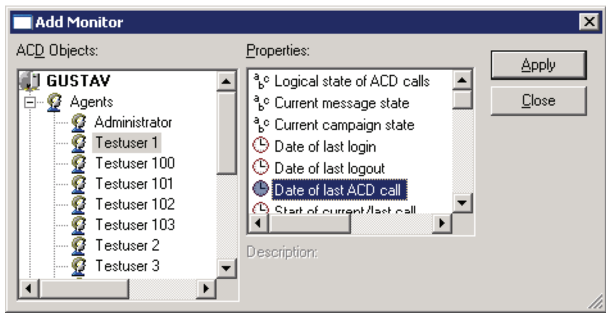
To set up a new monitor configuration click **New** in the **File** menu. You may also click **New From Template** to edit a predefined monitor configuration. After having created a new configuration (or opened a template) you may place as many monitor windows in it as you need and add different contact center variables to it.

6.2 Saving a Monitor Configuration

You can save the current monitor configuration. Just click **Save** in the **File** menu. To save an existing configuration under a new name, click the **Save as** function in the **File** menu and specify a folder and file name. By default, the last configuration used under the login profile is called upon the program start. It is quite useful for supervisors to have several configurations with different control and monitoring instances so that they can react quickly to changing contact center activities. During peak periods, for example, a monitor configuration specially adjusted to agent and service level monitoring may be useful. Such a configuration can consist of several views and should include evaluations on waiting calls, the number of agents ready to answer a call, the number of callers that received a busy tone etc. For special campaign monitoring you can create a configuration that delivers information on agents involved in the campaign. An individual monitor view should be available for campaign variables.

6.3 Adding Monitor Windows

To add a new monitor window to the current configuration, click **New Window** in the **Window** menu. You may now drag&drop the variables to be monitored from the workspace onto the monitor window. You can also add several monitors simultaneously by clicking **Add** in the **Monitor** menu. The **Add Monitor** dialog opens.



1. Select the ACD object you want to monitor from the **ACD Objects** field on the left.
2. The variables that can be monitored will be displayed in the **Properties** list. There you can select one or several properties from this list (keep the Shift or Crtl key pressed).

> ***NOTE:*** You find an overview of all variables to be monitored in Section A.1, “The monitorable Variables of a Contact Center”, on page 97.

3. Click the **Apply** button to add your selection to the current monitor window.

If you want to add more monitors, start with step 1. Otherwise exit this dialog by clicking the **Close** button.

6.4 Editing Monitor Windows

The appearance of a monitor window can be changed according to your needs. The following sections will show you how to change the columns and the display of a window.

6.4.1 Changing the Columns of a Monitor Window

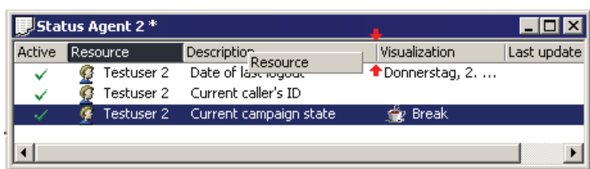
You may sort, reposition, add and remove columns of a monitor window.

Sorting columns

Each monitor window can be sorted by any column. The arrow in the column header tells you by which column the window is currently sorted. If the arrow points upwards, the display is sorted in ascending order, i.e. from A to Z. The sorting order of a monitor window can be changed by clicking the column by which the display is sorted. This will reverse the sorting order. If you want to have the window contents sorted by another column, simply click the desired column.

Repositioning columns

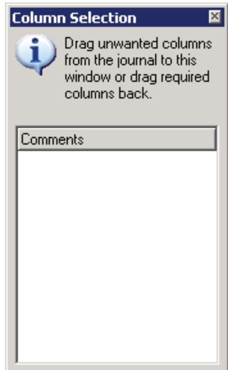
The columns of a monitor window can be repositioned. Just click the column header you want to reposition and keep the mouse button pressed. Drag the column to the desired position. Each possible position for the column will be indicated by two red arrows. Simply drop the column at the desired position.



Adding or removing columns

You may add or remove columns from a monitor window. Proceed as follows:

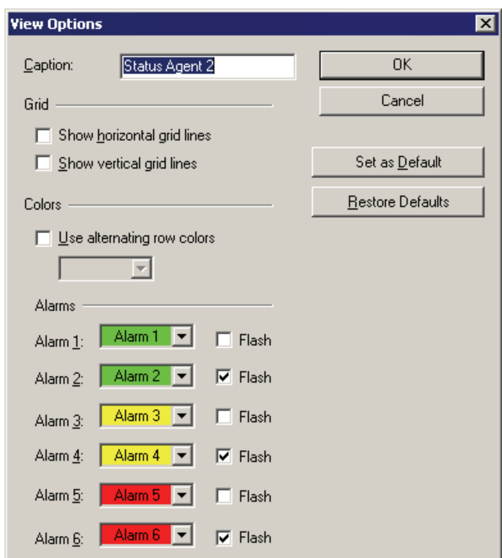
1. Select a monitor window and click the **Choose columns** entry in the **View** menu. The **Choose columns** dialog opens.
2. To remove columns from the window drag them into the **Column chooser** dialog with your mouse. The **Description** list shows all columns of the monitor window that are not used.
3. To add a column that is currently not used, just drag it from the list onto the column header of the monitor window. Possible position for the column will be indicated by two red arrows. Simply drop the column at the desired position.



You may also remove columns from the window by dragging them out of the window and dropping them anywhere outside the window.

6.4.2 Changing the View Options of a Monitor Window

A monitor window has certain view options, e.g. a caption or different alarm settings. You may change these view options. Activate the corresponding window and click **Options** in the **View** menu. The following dialog opens:



Caption

Use this field to enter a description of the window. This description will be displayed on the title bar of the window.

Grid

Use these check boxes to determine whether the entries of a monitor window should be separated from each other in order to improve clearness. For horizontal grid lines activate the **Show horizontal grid lines** check box, for vertical lines **Show vertical grid lines**.

Colors

Activate **Use alternating row colors** if you want have the rows of a monitor window displayed in alternating colors. Select a color from the list below the check box.

Alarm

Use the **Alarms** section to highlight the different alarm conditions when the corresponding alarm occurs (see Section 13.2, “Configuring Sound Events for Alarms”). You may select a color for each of the possible alarms. Activate the **Flash** check box if the display should flash in case of an alarm.

Set as Default

Sets the current configuration as default for new windows. This does not apply to already existing windows.

Restore Defaults

Restores the default settings.

7 How to set up a Contact Center

So far we have always assumed that the contact center with its ACD groups and the corresponding agents has been set up completely. The following sections will show you how to set up a contact center with the ACD Supervisor from scratch. A precondition is that the physical installation and configuration of the components (PBX, contact center server, agents PCs etc.) have been completed successfully. For further information on the installation and configuration please refer to Installation Manual. In our example we will use a fictitious software company. The corporate contact center consists of

- **a technical support** who will help the customers solving their technical problems and
- **an order hotline** who will take orders and also carry out outbound customer care campaigns.

The following figure shows an overview of the groups and their agents as well as the telephone numbers of the contact center.

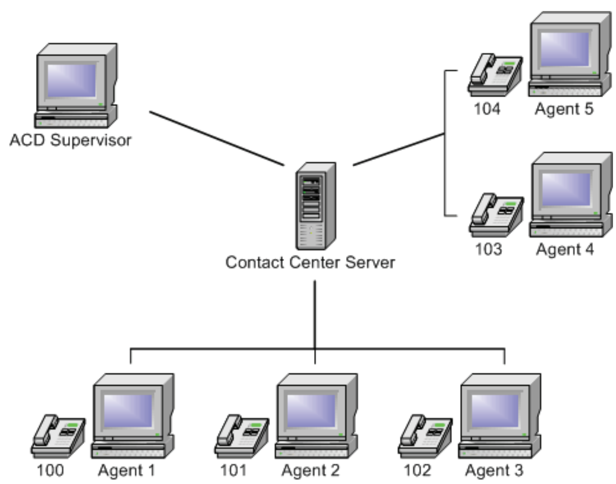


Figure 1 Contact Center Overview

The phone numbers of the single agents are the phone numbers of the respective workstation telephone. These numbers will not appear outside the contact center. The agents are available via the corresponding ACD group telephone number from outside. Since the company sells its products world-wide, the agents need to have foreign language knowledge (English, French). Such knowledge is set up as skills, so that, based on telephone numbers, the callers are routed to the agent with the respective language knowledge via an address rule.

How to proceed

A wizard will give you step-by-step assistance when setting up a contact center with the ACD Supervisor. The following example should give a first idea on how the wizard works. The wizard offers you different paths to follow. For example, you could set up an ACD group and then branch off to set up the corresponding agents. For each agent you may then define all necessary skills.

On the next pages we will, however, set up the contact center sequentially, following these steps:

1. Setting up the ACD groups (Support and Order Hotline)
2. Setting up all agents
3. Setting up and assigning the skills (French and German)
4. Setting up the address rules (calls from France will be routed automatically to agents with French language skills).

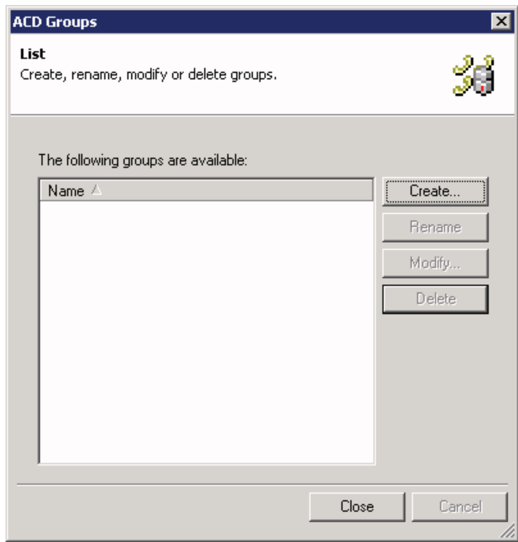
Once you are familiar with the basic features you may use the wizard to add, edit or delete groups, agents, skills etc.

7.1 Setting up the ACD Groups

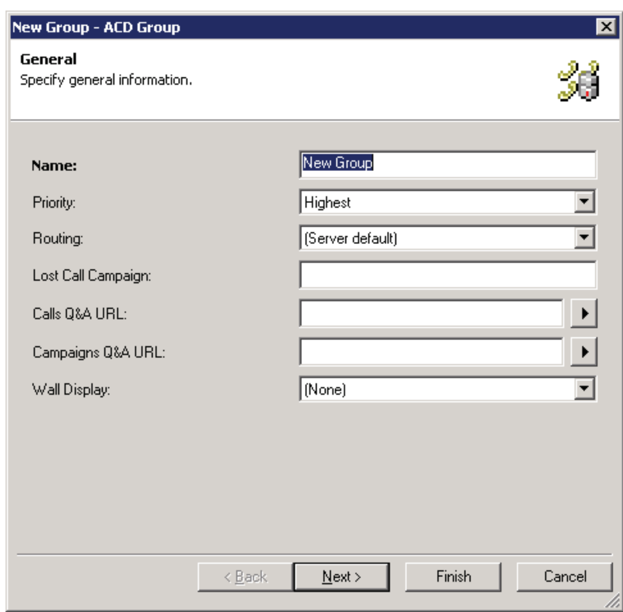
How to set up the ACD groups:

7.1.1 Step 1 – General Settings

1. Click **Groups** in the **Administration** menu. The following dialog opens. The list of available groups is empty, i.e. no groups have been set up.



2. Click the **Create** button. The following dialog opens. Enter the following:



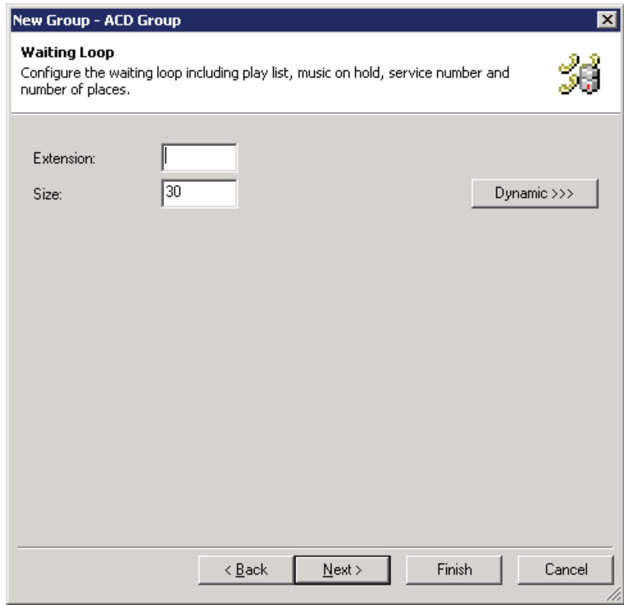
Name	Enter a unique name for the ACD group (in our example 'Order Hotline').

Priority	Priority (’Highest’, ’High’, ’Medium’, ’Low’ and ’Lowest’) determines the order of the ACD groups for incoming calls. **Example:** Agent 1 is member of two ACD groups. One of these groups has the ’Highest’ priority and the other ’Medium’. If two calls are in the waiting loop for the agent (one for each group), the agent will receive the call for the group with the higher priority first.
Routing	This field can be used to determine the procedure by which messages will be distributed among the agents. Possible settings are: **Longest idle:** The agent who has been inactive longest receives the next message. **Cycle:** This option is used to effect cyclic call distribution, in other words, all agents of a group are run through in succession until an available agent has been found. **Linear:** When this item is active, agents are provided with messages according to a previously defined order. The position of the agent in this sequence can be separately set for calls, messages and campaigns in Communications (see manual ’Communications’). **<Server default>:** With this setting the global routing (one of the three mentioned above) specified in the server is applied.
Lost Call Campaign	Here you can enter a name for a campaign under which lost calls can be collected. Via this campaign it is then possible to track the calls. This campaign is created automatically and does not have to be specially created.
Calls Q&A URL/ Campaigns Q&A URL	Internet address for the question&answer script to be called for incoming calls. Click the button next to this field to add various parameters to the URL that can be used for dynamically calling certain HTML pages.
Wall Display	If you use a wall display for this group, the group‘s number (0...15) is entered here so that the displays can be correctly addressed. Default is (None).

3. Click the **Next** button.

7.1.2 Step 2 – Configuring the Waiting Loop

The **Waiting Loop** dialog opens. Here you may modify the waiting loop size. It is not necessary to make an entry in the Extension field as the waiting loop is executed via Vogue. An extension range has already been assigned to Vogue.

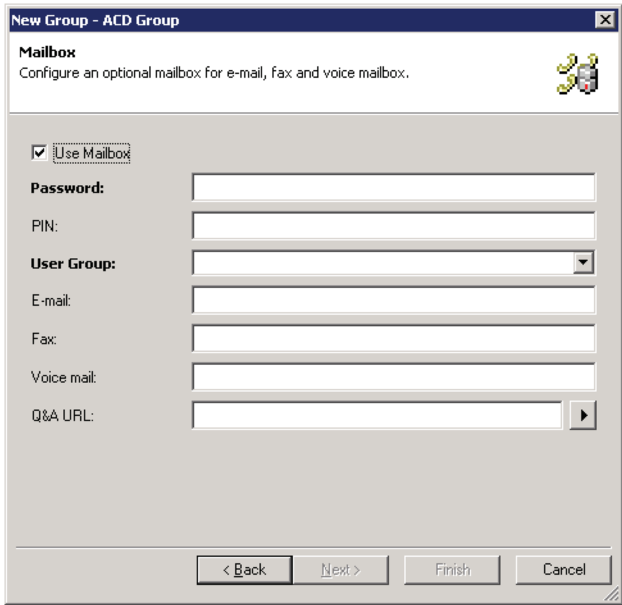


1. Enter the max. number of waiting calls for the waiting loop in the **Size** field. The statistical value 30 is preset. You can define the waiting loop size dynamically by clicking the **Dynamic** button. You find more detailed information in Section 7.5, “Special ACD Group Settings”.

2. Click the **Next** button.

7.1.3 Step 3 – Mailbox

The **Mailbox** dialog opens. Here you may define a mailbox for the ACD group so that the group is able to receive e-mails, fax and voice messages. The mailbox may also be used as overflow for messages and calls that could not be routed to an agent. Furthermore, you can reroute messages and calls to a mailbox depending on calendar definitions and certain times of the day. To activate the mailbox, click the **Use Mailbox** checkbox.

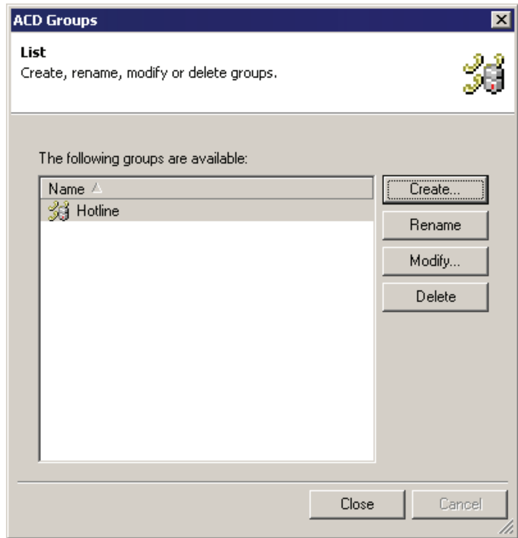


The following fields, of which **Password** and **User Group** must be filled in, are available :

Password	Password for access to the contact center server.
PIN	Personal identification number (PIN) of the group. Is used to retrieve messages via telephone.
User Group	Group assignment is required to assign privileges. 'User group' is sufficient for agents.
Email	The e-mail address for incoming mails.
Fax	The fax number, if fax messages are to be received
Voice Mail	The voice box number, if voice mails are to be received.
Q&A URL	Internet address for the question & answer script to be called for incoming calls. Click the button next to this field to add various parameters to the URL that can be used to call certain HTML pages dynamically.

If you clicked the **Next** button now, the wizard would guide you through the setup of skills and agents. But we will complete the setup of the **Order Hotline** ACD group now by clicking the **Finish** button. You will return to the first dialog of step

1. Repeat steps 1 to 3 for the **Support** ACD group. When you have completed that, you may continue to set up the ACD agents as described in the following chapter.

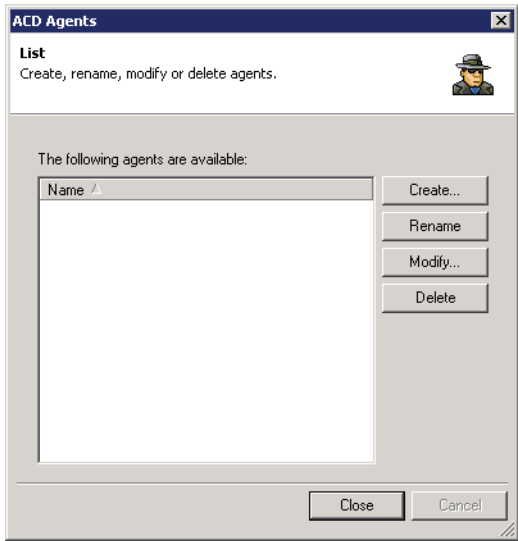


7.2 Setting up the ACD Agents

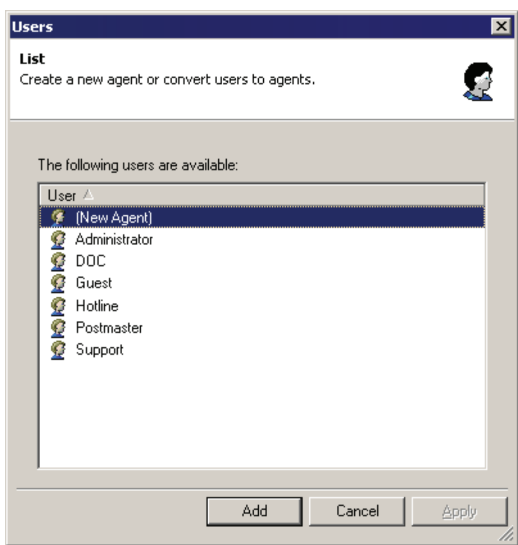
How to set up the ACD agents:

7.2.1 Step 1 – Select User

1. Click **Agents** in the **Administration** menu. The following dialog opens. The list of available agents is empty, i.e. no agents have been set up yet.



2. Click the **Create** button. The following dialog opens. All existing users of the system will be displayed.

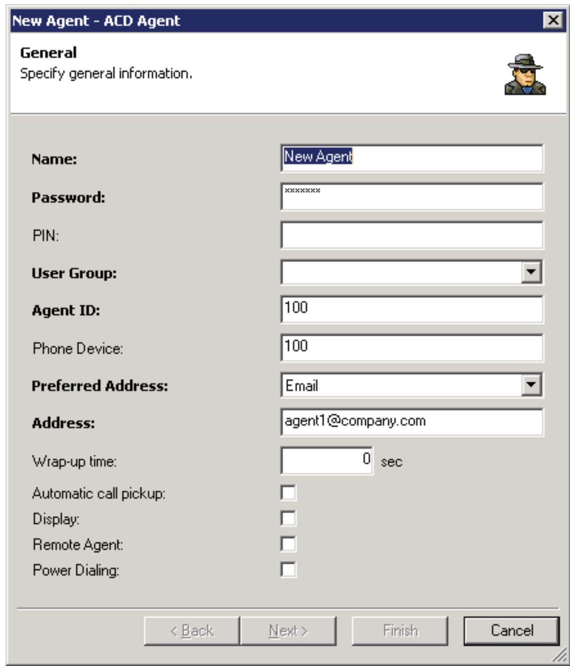


3. If you want to convert an existing user to an agent, select the corresponding user. If you want to add a new agent to the system, select the **(New Agent)** entry.

4. Click the **Add** button.

7.2.2 Step 2 – General Settings

1. The following dialog opens. The following fields are available (the bolded fields must be filled in):



Name	Name of the agent. Can be the real name or an alias name.
Password	Password for the agent to access the contact center server.
PIN	Personal identification number (PIN) of the agent. Is used to retrieve messages via telephone.
User Group	Group assignment is required to assign privileges. ’User group’ is sufficient for agents.
Agent ID	Enter a unique number that will identify the agent.
Phone Device	Number of the agent‘s workplace telephone.
Preferred Address	Use this field to define the preferred service for the agent. If you set up an agent who can be addressed only via Microsoft Exchange®, then select EXCH.
Address	Enter the corresponding address for all other services (not required for ’Mailbox’).

Use the lower four checkboxes to activate or deactivate the following functions:

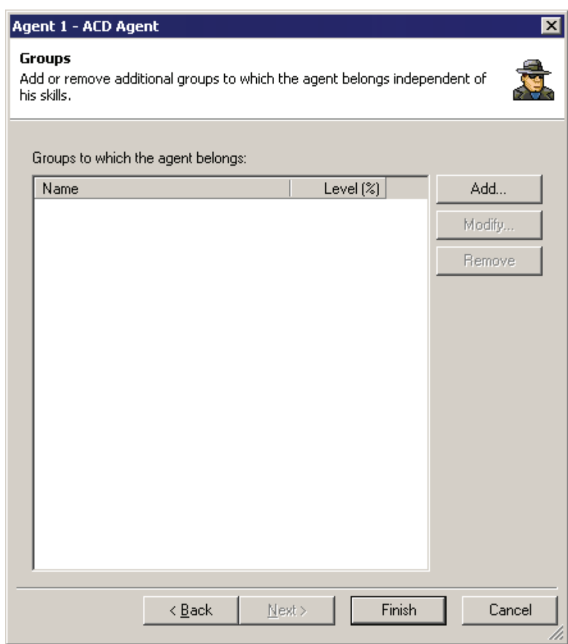
Automatic call pickup	Calls for this agent will be answered automatically (only useful when headsets are used).
Display	Activates the telephone display.

Remote agent	With this option you can specify whether the new agent will access the system via a remote connection and, for example, make his/her calls from home (**remote agent**), or will be in the local network. Since a remote agent is not directly connected to the PBX, the connection cannot be supervised by means of CTI. So that a remote agent's connection can be checked and, beyond that, statistical raw data can be created, the B-channel of the connection is maintained when forwarding to a remote agent. You find further information about the remote agent functionality in the *Multimedia Contact Center* manual.
Power Dialing	Campaigns are automatically initiated for this agent. An agent can process campaigns either in **Power dialing** or **Manual dialing** mode. Before creating campaigns in both modes make sure that agents for both modes exist in the respective ACD groups.

2. Click the **Next** button. A dialog opens. Here you can assign skills to this agent. We will carry out this assignment after setting up all agents (see Section 7.3, “Setting up Skills”). Therefore, click the **Next** button in this dialog as well.

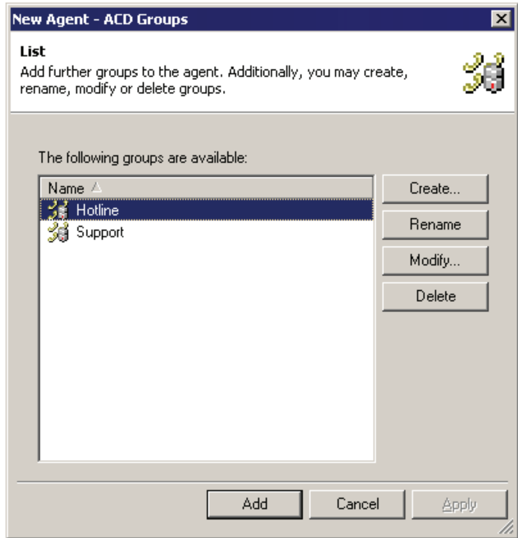
7.2.3 Step 3 – Assigning to a Group

1. The following dialog opens:



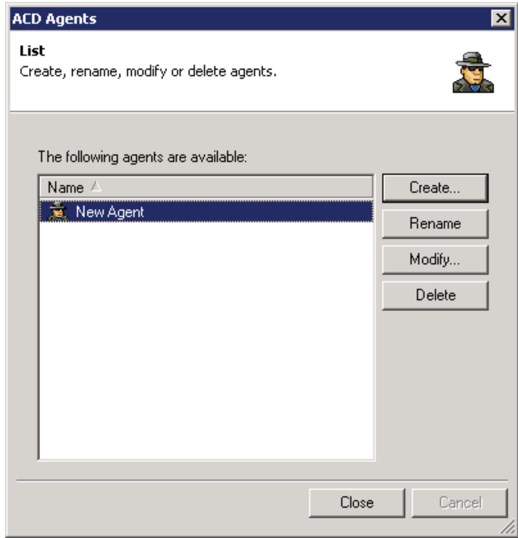
2. Click the **Add** button.

3. The following dialog opens:



4. Select the group that you want to assign to the agent. In our example group "Order Hotline".
5. Click the **Add** button.

6. You will return to the previous dialog. The agent is now member of the “Order Hotline” group. One agent can be member of several groups.



7. Complete the agent setup by clicking the **Finish** button.

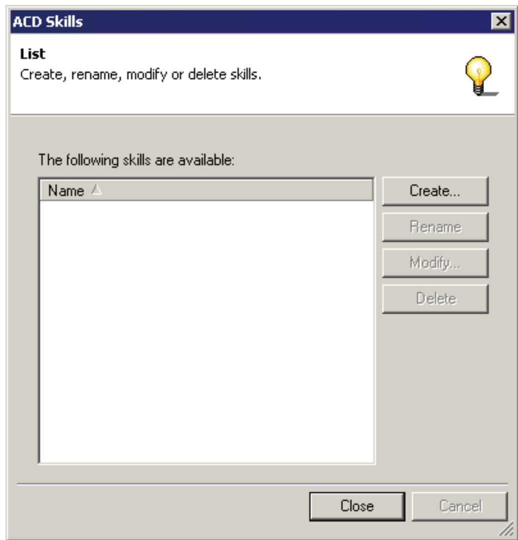
8. You will return to the first dialog. Repeat all steps for agents 2 to 5. After that you may continue with the set up and assignment of skills (see next chapter).

7.3 Setting up Skills

To set up and assign skills proceed as follows:

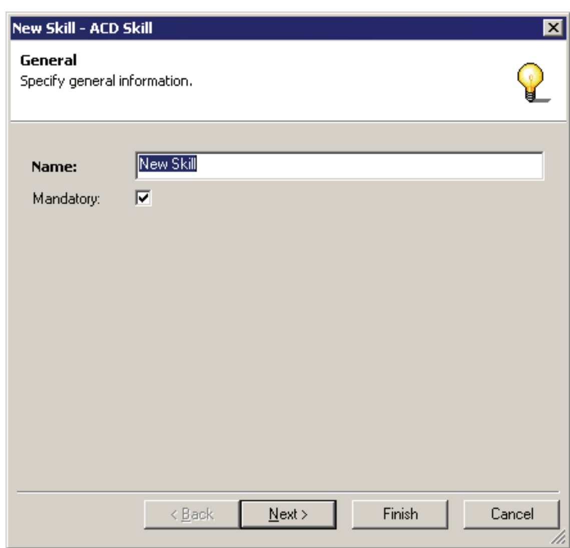
7.3.1 Step 1 – Setting up the Skill

1. Click **Skills** in the **Administration** menu. The following dialog opens. The list of skills is empty, i.e. no skills have been defined yet.



2. Click the **Create** button.

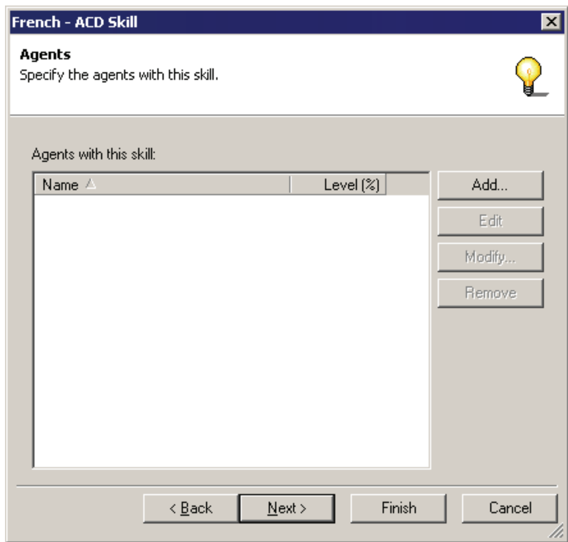
3. A dialog opens in which you enter the name of the new skill. In our example “New Skill”.



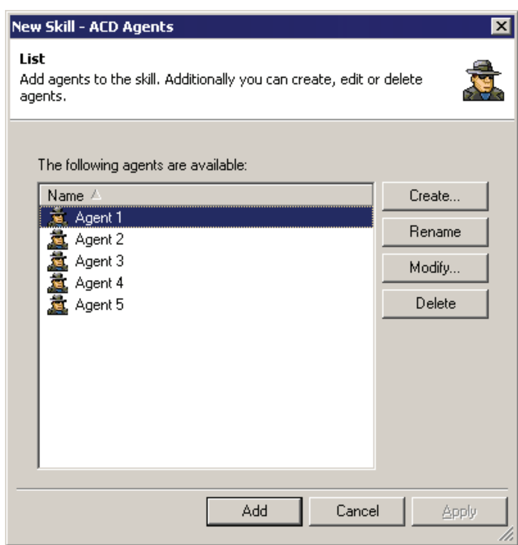
4. If you activate **Mandatory**, the skill will be mandatory. **Example:** If two mandatory skills are assigned to an ACD group, then only the agent who has both skills will be included in the call routing. In our example the skill “New Skill” should be mandatory.

5. Click the **Next** button.

7.3.2 Step 2 – Assigning Agents



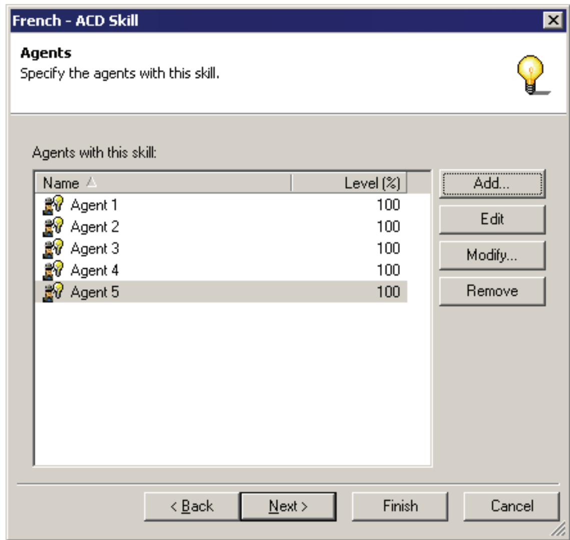
1. The following dialog opens.



2. Select an agent from the list (in our case all agents should have French language skills). Therefore, select all agents (keep the Shift key pressed).

3. Click the **Add** button.

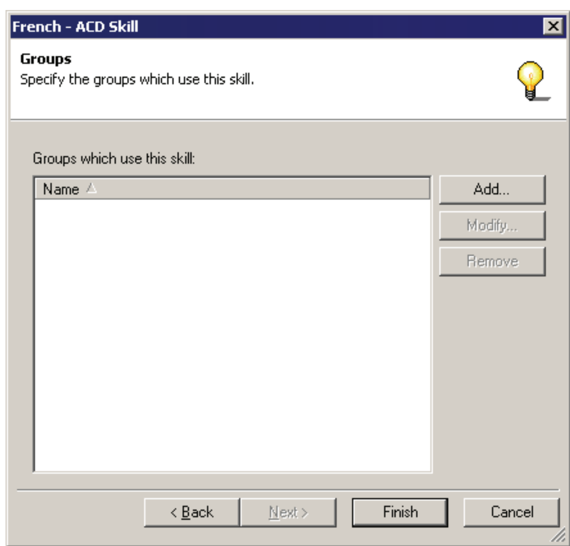
4. You will return to the previous dialog. All agents have now been assigned 100% French language skills. 100% means that the agents' French is very good. If you want to reduce this value for some agents, click into the **Level (%)** column and change the corresponding value.



5. Click the **Continue** button.

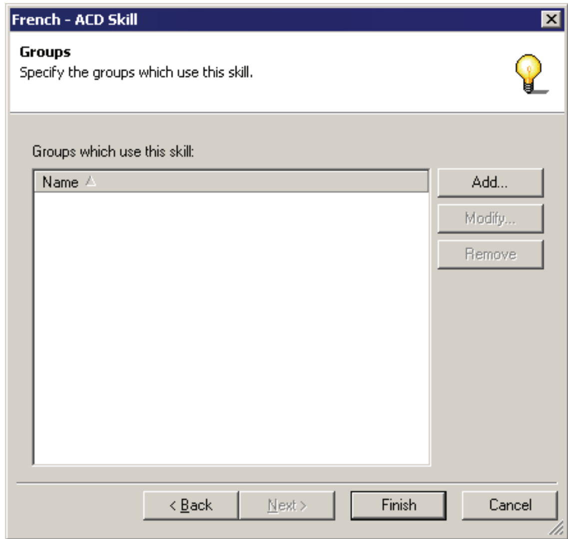
7.3.3 Step 3 – Assigning Groups

1. The following dialog opens. Here you assign the skill to a group.



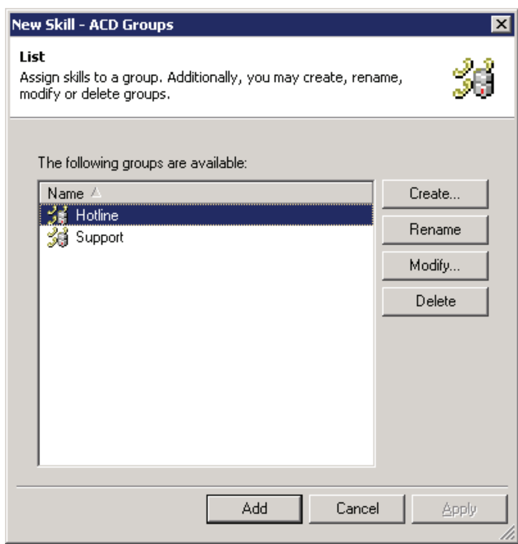
2. Click the **Add** button.

3. The following dialog opens. The list of groups with skill “French” is empty at first.



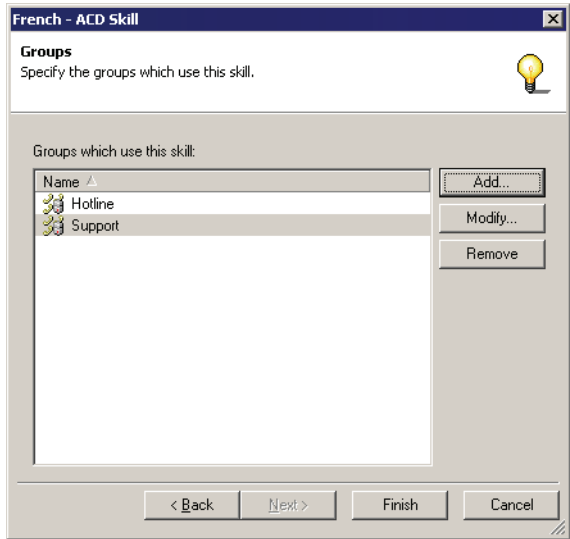
4. Click the **Add** button.

5. Select the groups that you want to furnish with skill “French”. In our example both groups.



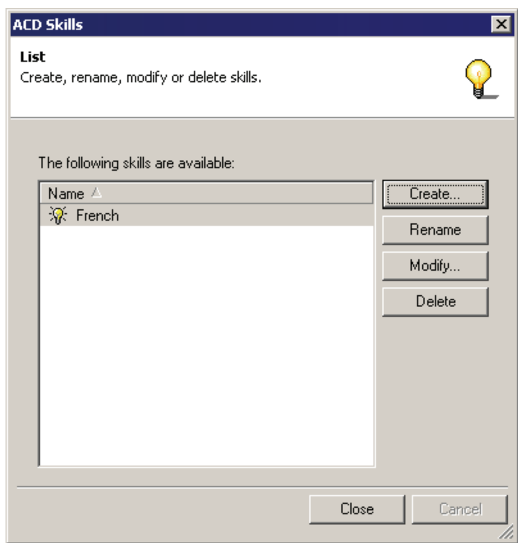
6. Click the **Add** button.

7. You will return to the previous dialog. The skill “French” is now assigned to the “Order Hotline” as well as to the “Support” group.



8. To complete the skill set up click the **Finish** button.

9. You will return to the first dialog. Repeat steps 1 to 2 to set up the “French” skill for the agents 1 and 3. Make sure that the **Mandatory** function is deactivated as this skill should not be mandatory for the groups.

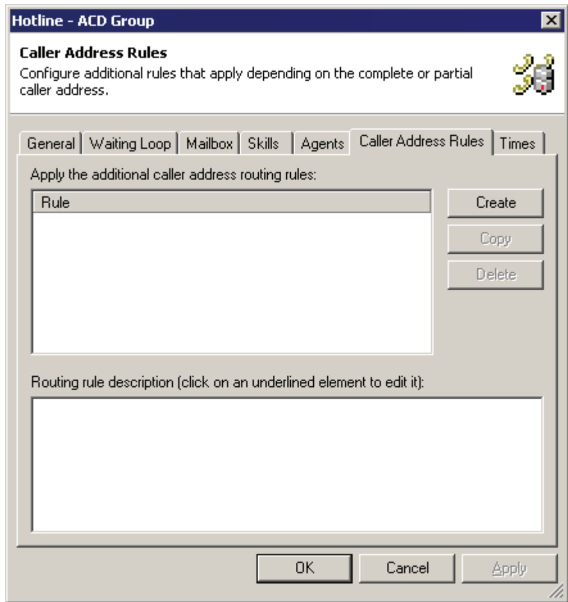


Afterwards you may continue with the address rule set up (see next chapter).

7.4 Setting up Address Rules

In the following chapter we will set up an address rule. This address rule makes sure that all calls starting with a French area code will be forwarded automatically to an agent in the respective group who has French language skills. Proceed as follows:

1. Click **Groups** in the **Administration** menu. A dialog opens listing all ACD groups.



2. Select the group for who you want to configure the address rule and click on the **Modify** button. In our case we begin with the Order Hotline.
3. Click the **Caller Address Rules** tab in the then open dialog.
4. Click the **Create** button. A new rule will be generated in the field next to the buttons. This rule can be edited in the field below.
5. Click the blue question mark in **Calling parties starting with number <?>** and enter the international area code of France (+33). The normalized format enables the NCO rules to automatically and correctly resolve a possibly required office code and international prefix.

NOTE: The number entered in this dialog must follow the normalized (NCO) rules configured in the server. Otherwise, the comparison will fail. In the server side all the numbers are used in the normalized form (starts with the '+' signal, followed by country code, area code and so on).

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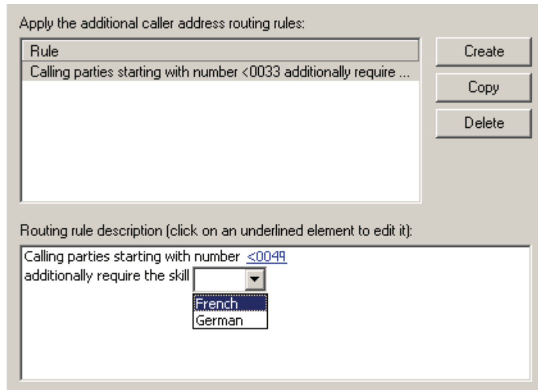
6. Then select the skill “French” from the pull-down menu next to **additionally require the skill**.



7. Click the **Apply** button and then **OK**. Hotline calls starting with a German area code will be automatically forwarded to agent 1. This requires, however, that the number of the caller will be transmitted.

8. Repeat the steps for the Support ACD group.

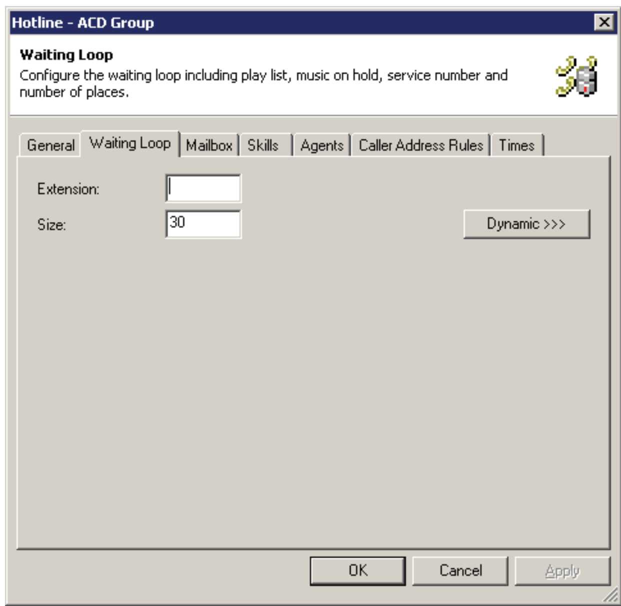
7.5 Special ACD Group Settings

Some special ACD group settings that have not been described in the example of a contact center set up will be explained in the following.

7.5.1 Dynamic Waiting Loop Size

A maximum number of waiting callers for an ACD group can be defined. We had defined this number statically in our previous example. To define the waiting loop dynamically proceed as follows:

1. Click **Groups** in the **Administration** menu.



2. Select a group.
3. Click the **Change** button.
4. Click the **Waiting Loop** tab.
5. Click the **Dynamic** button.

Further fields and list boxes will be displayed next to the **Size** field. The definition formula is as follows:

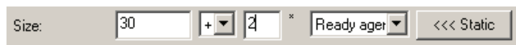
<Static value of waiting loop> <operand> <factor> * <mode factor>

<Factor> is a complete number. Either the number of ready agents or a special time factor can be used as <mode factor>. The following examples will explain the formula in detail:

Example: Ready agents

If you want to define the waiting loop dynamically by the number of ready agents, then

1. select **Ready agents** from the list.
2. Enter a factor (here 2).
3. Select an operand (here “+”).

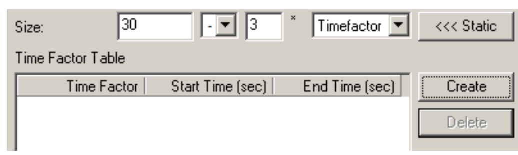


If three agents are ready, the waiting loop size will be set to 36 (30 + [2 x 3] = 36).

Example: Time factor

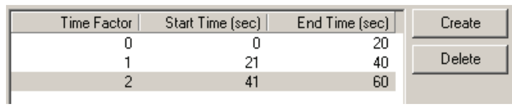
If you want to define the waiting loop dynamically by a time factor, then

1. select **Time factor** from the list. A further table and some buttons will be displayed automatically.



2. Enter a factor (here 3).
3. Select an operand (here “-”).
4. Click the **Create** button. A new line for the time factor ’0’ will be inserted in the time factor table. You may add up to 6 time factors by clicking the **Create** button.

5. Enter a time range for the time factor in the **Start Time** and **End Time** column (in seconds). The start time will be entered automatically for each new time factor. If the end time for the last time factor is not entered, this time factor will be applied to times that are larger than the start time.



Time Factor	Start Time (sec)	End Time (sec)
0	0	20
1	21	40
2	41	60

If in our example the average waiting time of the callers in the waiting loop was 30 seconds, the waiting loop size would be 27 (30 - [3 x 1] = 27). If the waiting time was 50 seconds, the waiting loop size would be 24 (30 - [3 x 2] = 24).

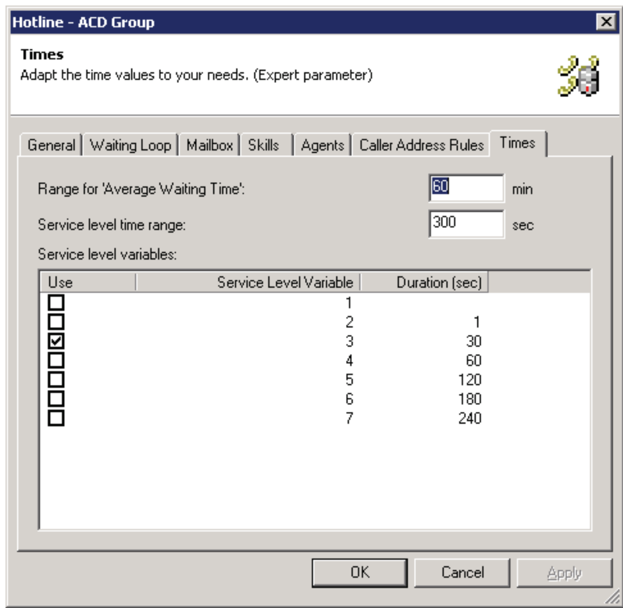
The average waiting time refers to the variable “NCA” to monitor the waiting loops (see Section A.1.5, “Variables for Waiting Loop Monitoring”). You may set the time range for the average waiting time in the “Times” tab (see Section 7.5.2, “Time / Service Level”).

IMPORTANT: Make sure that the value for the dynamic waiting loop size is never ’0’ or negative.

7.5.2 Time / Service Level

The following section describes how you can configure the time parameters for the different service levels and for playing the first announcement. For further details on service levels please refer to Chapter 12, "Service Level". Proceed as follows:

1. Click **Groups** in the **Administration** menu.
2. Select the group that you wish to edit and click the **Modify** button.
3. Click the **Times** tab.



4. The following parameters can be edited:

Range for the Average Waiting Time

Here you can enter in which time interval (in minutes) the average waiting time of the callers is to be determined.

Service level time range

Here you can set in which time interval (in seconds) the average service level values are to be determined.

7.6 Roaming Agents

You activate or deactivate the **Roaming Agents** feature in the **Administration** menu. This feature enables ACD agents to change their assigned phone numbers, so that they need not use fixed ones, mostly provided by the administrator, all the time.

For example, with this feature an agent can change his/her location and operate with any ACD phone number of the system, or a terminal device with one ACD phone number can be used by several agents. The terminal device cannot be used by several agents simultaneously, though, since it is in fact only one telephone. Changing the location means for agents that they are not bound to a telephone with a specific number but can freely select an available phone and thus an available number. Furthermore, a telephone can be used by several agents one after another, since the telephone is not permanently assigned to a single agent but freely available in the system.

When logging on to the system, each ACD agent can freely select a phone number for himself/herself. Each time an agent logs on, the system opens a dialog in optiClient that queries the ACD phone number to be used. Each configured ACD phone number can be selected here by an agent. The phone number used last is offered for selection at the login, if it has not been occupied by another agent in the meantime. Each ACD phone number is still linked to a specific terminal device, such as a telephone, so that each agent should only select the ACD phone numbers he/she can access with a terminal device.

If a phone number is currently occupied by another agent, a corresponding warning is issued. It is then possible to adopt the phone number from the other agent. The other agent is then detached from the phone number and receives the information that he/she needs to select a new one. Detaching an agent from a phone number may be useful when the agent could not be successfully logged off from the system and phone number was thus not available. For, when an agent logs off from the system, the selected phone number is released. Other agents may then use the phone number that has become available again.

If the Roaming Agents feature is activated, it is valid for all configured ACD agents.

8 Campaign Management

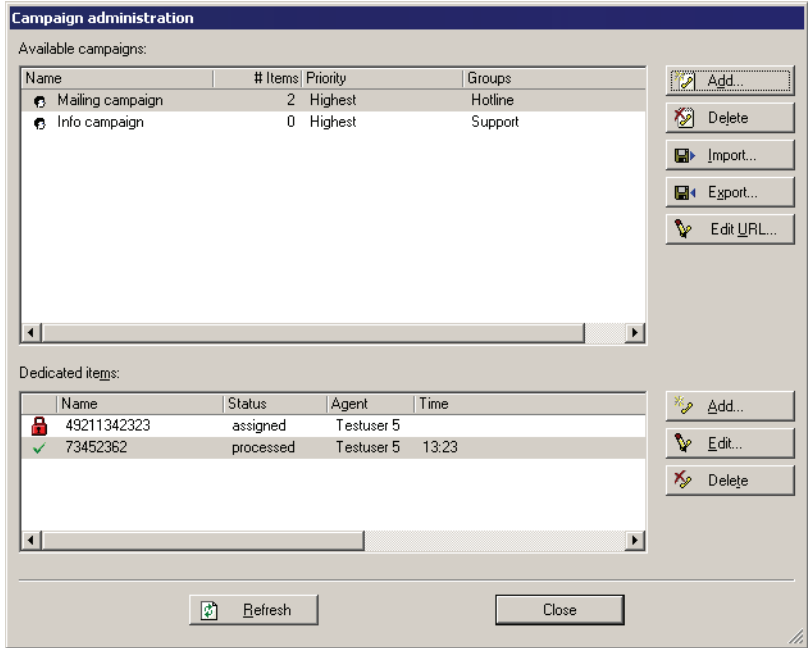
Campaigns are call lists that can be linked to one or several ACD groups. The corresponding agents can then get their campaign jobs from these lists of calls and block them at the same time. Thus it is not possible for two agents to process the same job. In addition to this mode, which is an active one from the agent's point of view, there is also a passive mode. In this mode, the campaign jobs are automatically assigned to the agents. This mode is called **power dialing**. The client application **ACD Agent** determines if the agent's behavior is active or passive in campaigns.

NOTE: Power dialing may only be applied by a contact center agent if he/she has switched to the 'ready' state for this mode via the ACD Agent's user interface.

How does a campaign work? The agents log in to the system and signalize that they are ready to accept campaign jobs. If these jobs exist, they will be assigned to the agent. These jobs are then blocked for other agents. After an agent has completed a job, he/she flags it as edited.

NOTE: The server assigns campaign jobs to agents every 20 seconds. Even in case of a manual assignment by the supervisor or with power dialing it may take up to 20 seconds until an agent can take notice of the assignment.

To add a new campaign or edit existing campaigns click **Campaign administration** in the **Administration** menu. The Campaign administration dialog opens:



The upper part of the dialog shows all available campaigns in the **Available campaigns** list. For example, the *Lost Call Campaign*, which can be assigned to an ACD group upon its configuration (see Section 7.1, “Setting up the ACD Groups”), could be displayed here for the single ACD groups. The list consists of several columns. The **Priority** column shows the importance of the campaign. The **Groups** column indicates which group has been assigned to the campaign. The **Name** column indicates the name of the campaign. The **# Items** column indicates the number of campaign items in this campaign. When you select a campaign in this list, all corresponding items will be displayed in the **Dedicated items** list.

The following chapters will show you how to create campaigns. You may create campaigns manually (see Section 8.1, “Creating Campaigns”) or import them (see Section 8.2, “Importing Campaigns”).

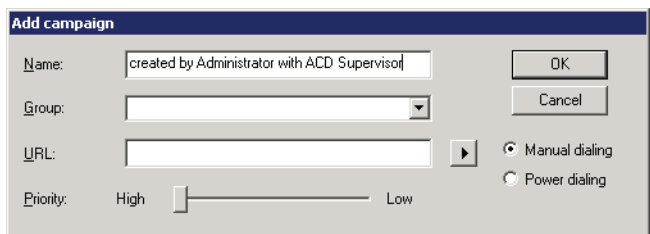
8.1 Creating Campaigns

The following paragraph describes which parameters you may define for campaigns. You can name a campaign you would like to create, assign it to a specific ACD group, select an internet address for a question & answer script, determine a campaign's priority and decide on the campaign's dialing mode. There are two different dialing modes, an active and a passive one (cf. Chapter 8, "Campaign Management"). In the active mode "manual dialing" you determine that the agent is able to dial himself/herself, whereas the calls are automatically initiated via the system in the passive "power dialing" mode.

NOTE: So that an agent can use the 'Power dialing' mode, he/she must have set the **Power dialing** option in the **ACD Agent**'s user interface.

How to create a campaign:

1. Click **Campaign administration** in the **Administration** menu.
2. Confirm with a click on **Add**. The following dialog opens.



3. Enter a descriptive name for the campaign in the **Name** field, e.g. 'Mailing campaign'.
4. Campaigns will be assigned to an ACD group. Select a group from the **Group** list.
5. You may enter an Internet address for the question&answer script to be called for incoming calls. Click the button next to this field to add various parameters to the URL that can be used to call certain HTML pages dynamically.
6. Use the **Priority** slider to determine a priority for the campaign. Campaigns with high priority will be processed before campaigns with low priority.
7. Select a dialing mode. If you activate **Manual dialing**, the agent has to dial the number of the campaign item by himself/herself, with **Power dialing** this occurs automatically.

NOTE: This selection also determines which agents receive the campaign for processing. In case of **Power dialing**, jobs are exclusively assigned to agents for who the **Power dialing** option is set.

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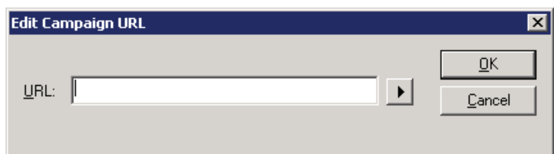
8. Accomplish the new campaign definition with a click on **OK**.

The next step is to add campaign items to this new campaign. You can obtain more information in Section 8.1.2, “Adding Campaign Items”.

8.1.1 Changing the URL of a Campaign

The description, group assignment, priority and dial mode of defined campaigns cannot be changed. It is possible to adjust the specified URL of a campaign, though. Select the desired campaign and click the **Edit URL…** button. The following dialog is displayed:

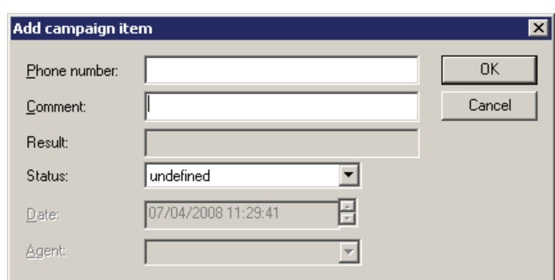


Change the campaign URL and confirm your entry with **OK**.

8.1.2 Adding Campaign Items

To add a new item to a campaign proceed as follows:

1. Open the **Campaign administration** dialog.
2. Select a campaign in the **Available campaigns** list.
3. Click the **Add** button next to the **Dedicated items** list. The following dialog opens:

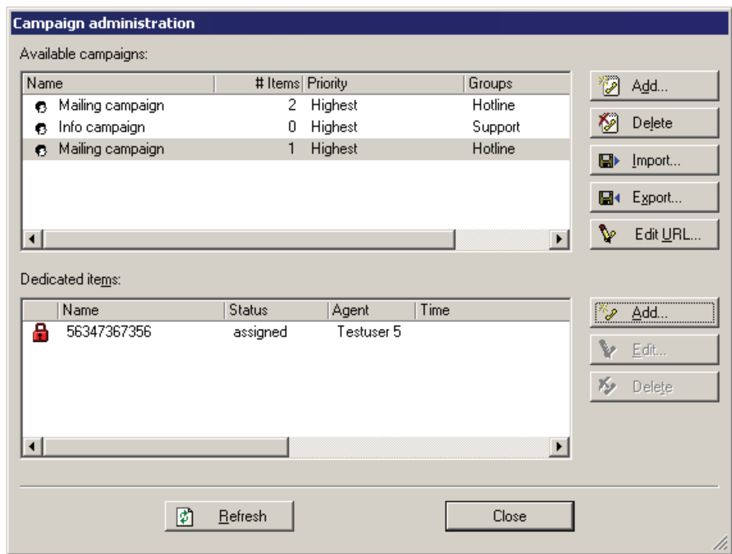


4. Enter the telephone number of the person to be called in the **Phone number** field. If the number is stored in the database of the server, the name will be displayed in the list of campaign items.
5. Enter a descriptive comment on the campaign item in the **Comment** field. This will give the agent some information on the purpose of the campaign.
6. Select a state for the campaign item from the **Status** list. If you create a new campaign item, only the following two statuses are relevant: **undefined** and **scheduled**.

- **Undefined** means that the item will not be assigned to an agent yet. Campaign items will be distributed automatically. As soon as an agent is ready to take campaign items he/she will receive the items assigned to his/her ACD group.
- **Scheduled** allows you to enter a date in the **Date** field at which the item is to be processed. You may enter the date manually or position the cursor at the corresponding part of the date and click the control to the right.

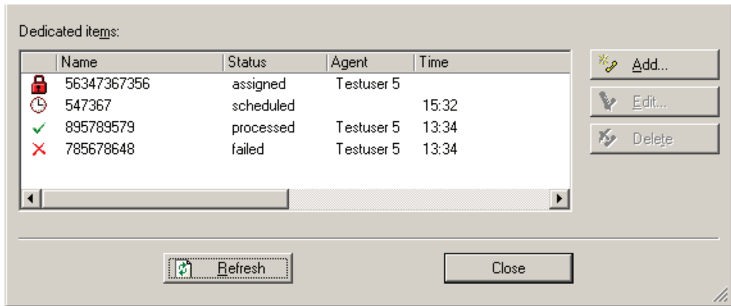
7. Click **OK**.

The campaign item will be assigned automatically to an agent of the corresponding ACD group. As long as the item is assigned, you can neither process nor delete it. A red padlock indicates that.



8.1.3 Managing Campaign Items

The **Dedicated items** list offers you the following information on the campaign items:



Symbols

The symbols indicate the current campaign item status:

Assigned: The campaign entry is assigned to the agent indicated in the **Agent** column. This means that the agent is currently logged in and ready for campaigns.

Undefined: The campaign entry has not been assigned. This means that none of the agents of the ACD group the campaign entry has been assigned to is currently logged in or ready for campaigns.

Scheduled: The campaign item will be processed at a certain date.

Processed: The campaign item was processed successfully. The processing agent has assigned a state to the item that can be seen in the **Result** column.

Failed: The campaign item could not be processed. The processing agent has assigned a state to the item that can be seen in the **Result** column.

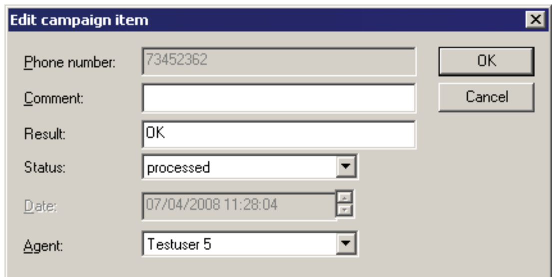
Meaning of the columns

Name	Contains the addressee of the campaign item. If the contact center server can find a telephone number for this name in its database, then the name will be displayed. Otherwise the telephone number of the callee is displayed here.
Status	Indicates the current status of the campaign item (see “Symbols“).
Agent	Contains the name of the agent who is processing the item or has processed it.
Time	Date of the scheduled item processing. The item will be assigned to an agent at that point in time.
Auto-Unlock	’1’ indicates that the item will be withdrawn from the processing agent if he/she logs off.
Comment	This column contains further information on the campaign item.
Result	The description contained here is set by the processing agent. It could include e.g. the failure reason or a processing comment.

IMPORTANT: Since the campaign item statuses are permanently changing, you need to update the Dedicated items list regularly by clicking the Refresh button.

8.1.4 Editing Campaign Items

To change a campaign item select the item in the **Dedicated items** list and click the **Modify** button. The **Edit campaign item** dialog opens.



Change the settings of this item and click **OK**.

NOTE: If a campaign item is in status **Assigned** (red padlock), it cannot be edited. The item must have been edited by an agent or all agents of the assigned group must be logged off.

8.1.5 Deleting Campaign Items

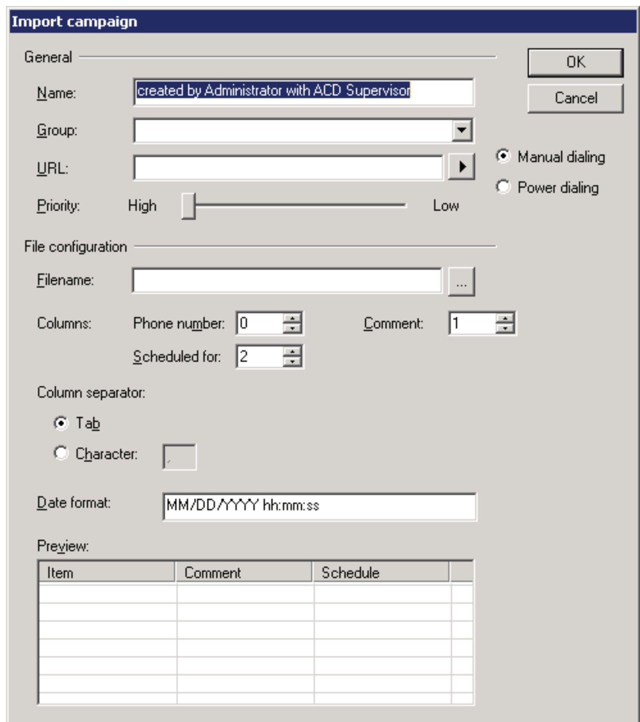
To delete a campaign item select it in the **Dedicated items** list and click **Delete**.

NOTE: If a campaign item is in status **Assigned** (red padlock), it cannot be deleted. The item must have been edited by an agent or all agents of the assigned group must be logged off.

8.2 Importing Campaigns

You do not have to enter large campaigns manually, these can be easily imported into the campaign administration. You can e.g. import customer telephone lists that have been exported from a database, but also tab-separated text files. It does not matter with which program the import file was created. It must merely be compatible with the import format, i.e. the information to be imported (telephone numbers, dates or comments) have to be separated by a unique character (e.g. tab or semicolon).

To import a file, click the **Import** button in the **Campaign administration** dialog. The **Import campaign** dialog opens:



The settings in the **General** section are the same as those for setting up a new campaign (see Section 8.1, “Creating Campaigns” on).

The following steps refer to the settings for the import file. The entries you make have a direct impact on the import of the campaign and are therefore displayed in the **Preview** window.

1. Select a file by clicking the **...** button in the **Filename** field.

2. Enter the position of the corresponding import file columns in the **Columns** section. If, for example, the telephone number is in the third column of the import file, then enter a ’3’ in the **Phone number** field. A negative value ignores this column during import. You may enter the values into the field or use the controls to the right.

3. Under **Column separator** you have to define the character separating the information of a campaign item in the import file. You can either select **Tabulator** or **Character**. If you activate Character, you have to enter the corresponding character in the input field.

IMPORTANT: Make sure that the separator differs from the other characters of the campaign item (e.g. date format). Therefore, do not use letters or numbers but characters like ';§$%&'. We recommend to use tabulators to separate the columns, which allows you to edit the import file in MS Excel.

---

4. Enter the desired date format under **Date format**. The following abbreviations should be observed:

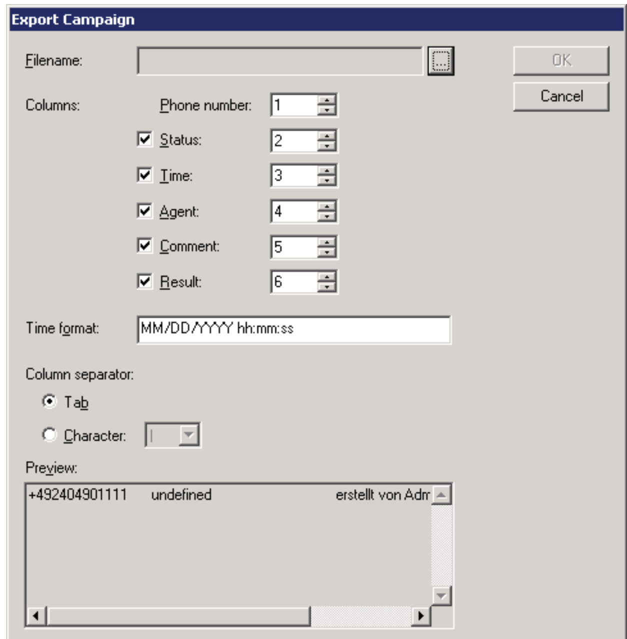
`DD`	Day	`hh`	Hours
`MM`	Month	`mm`	Minutes
`YYYY`	Year	`ss`	Seconds

   You can use these abbreviations in any combination. In doing so it does not matter which separators you use. Just note that the separators must comply with those of the import file. Possible combinations are e.g.: `MM/DD/YYYY hh.mm` or `DD.MM.YYYY hh:mm:ss`

5. The **Preview** field tells you if the data will be imported correctly.
6. If you are content with the preview, click **OK** to start the import.

8.3 Exporting Campaigns

Campaigns can exported so that they can be edited externally and reimported afterwards into the ACD Supervisor. To export a campaign select it in the **Campaign administration** dialog and click the **Export** button. The **Export campaign** dialog opens:



The settings here in the Export dialog are the same as in the Import dialog (see Section 8.2, “Importing Campaigns”). The only difference is that you have more columns to choose from in the **Columns** section.

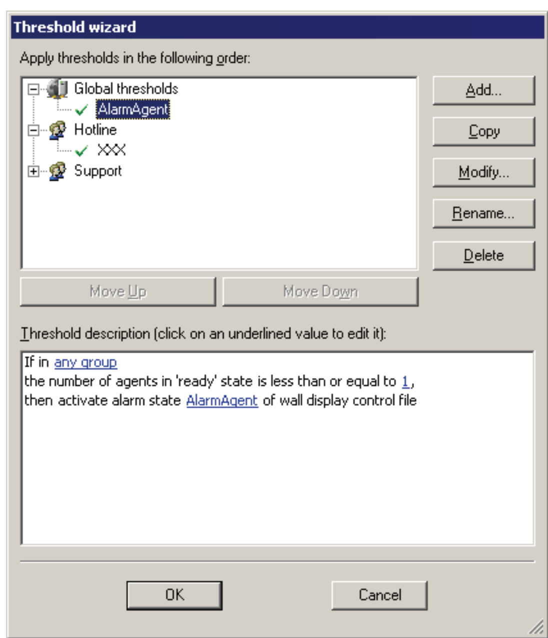
9 The Threshold Wizard

Thresholds are used for load- and situation-based control of the contact center. Thresholds link conditions to one or several actions. If the condition is met, certain actions are initiated. The definition of thresholds is either *global* or *group-related*. Global thresholds serve to control the contact center in case of e.g. an external-line breakdown. Group-related thresholds can be used to defuse situations in which the number of available agents falls too short, or the service level of a group is below a specific level.

9.1 Administering Thresholds

Thresholds can be defined or administered by means of the Threshold Wizard. Click **Threshold wizard** in the **Administration** menu. The following dialog opens:

The top section of the Threshold Wizard displays a list of all defined thresholds in the **Apply thresholds in the following order** tree structure. Below the **Global thresholds** entry you will find all global thresholds since they are given a higher priority over group-related thresholds. The tree structure is similar to the Windows Explorer directory view. Expanded entries start with a minus sign whereas a plus sign indicates that the entry can be expanded. This is done by double-clicking the entry or clicking the plus sign. Under an expanded entry all thresholds defined for this entry are listed. The threshold definitions are processed according to their order (from top to bottom). If you want to change the position of a threshold within the sequence, select it and use the **Move Up** or **Move Down** button.



As soon as you select a threshold, its content is displayed in the **Threshold description** list. There you can directly edit the threshold with a mouse click on the blue, underscored parts. If you click the blue parts, either entry fields or lists boxes will open. The above example displays a threshold called *AlarmAgent*. This is a global threshold meaning that as soon as the number of available agents in any ACD group is smaller than or equal to 1, the alarm state *AlarmAgent* will be displayed on the agents' telephone displays.

A threshold definition comprises at least four parts (five is the maximum):

- **A group** (*global* or *group-specific* threshold).
- **An event** that will trigger specific actions (e.g. low service level or the current number of calls).
- **A value range** which quantifies the event (e.g. more than three waiting calls).
- The optional **link to a time profile** (calendar).
- **One or more actions** which will be carried out when the above conditions are met.

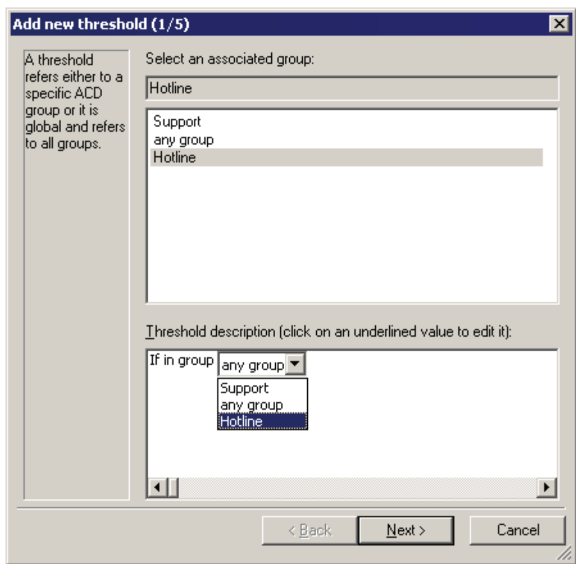
The Threshold Wizard will guide you through 5 dialogs when defining a new threshold.

9.2 Defining a new Threshold

In the following example we will define a new threshold that will rout all callers for the “Hotline” ACD group who have been waiting in the waiting loop for more than two minutes to a specific phone number. This telephone number may represent a mailbox that asks the caller to leave his/her telephone number. The call diversion is only to become effective if a corresponding time profile is in the *Open* state. In other words, if the time profile is *Closed* or in another state, the call diversion does not become effective.

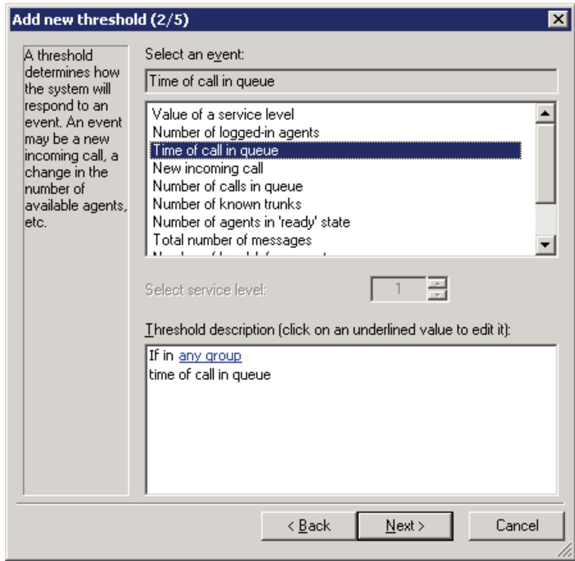
How to define a new threshold:

1. Click **Threshold wizard** in the **Administration** menu. The Threshold Wizard opens.
2. To add a new threshold click the **Add** button. The following dialog for defining the threshold opens:

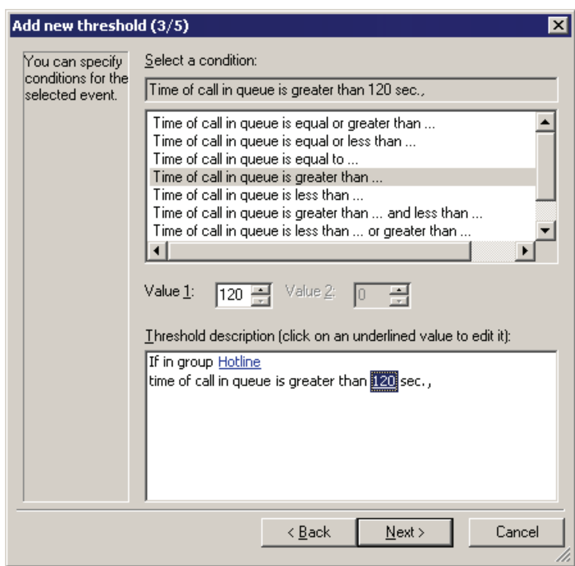


3. On the first dialog page select a group for which the threshold is to be used. If you select **any group**, you can define a global threshold. Select a certain group if you want to define a group-specific rule. We select the “Hotline” ACD group here. Click the **Next** button to move to the second part of the rule.

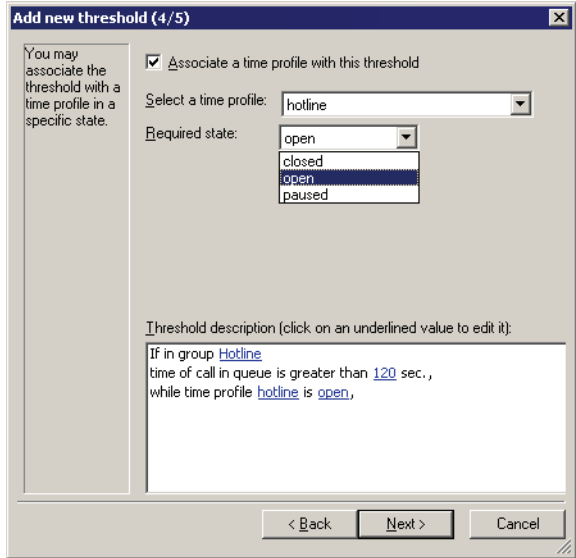
4. Select an event to trigger a specific action. In this example the **Time of call in queue** was selected. Click the **Next** button to link the event to a condition.



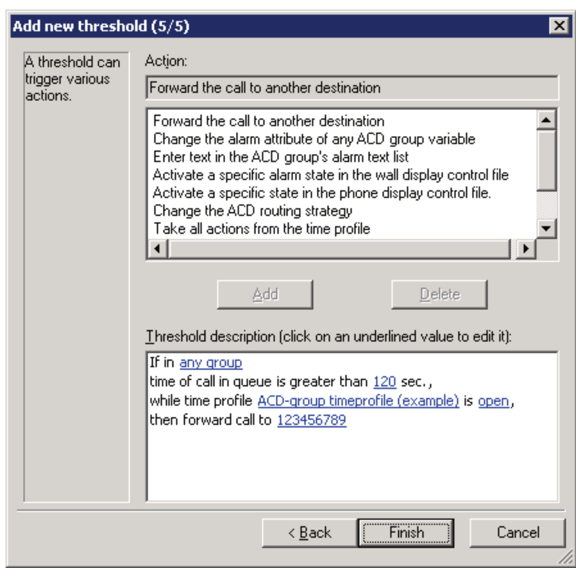
5. Depending on the type of event you may enter one or two values that will limit the event. The **time of call in queue** event can be further specified by various conditions. In our example **Time of call in queue is greater than**. Enter 120 seconds afterwards. Click the **Next** button.



6. You may add an optional time profile in the fourth dialog. Select the time profile and the required state. In our case select the time profile **ACD Group time profile**. For this, the **Open** state has been chosen from the **Required state** list. Click **Continue**. How to define time profiles is explained in Section 9.4, “Calendar Profiles”.

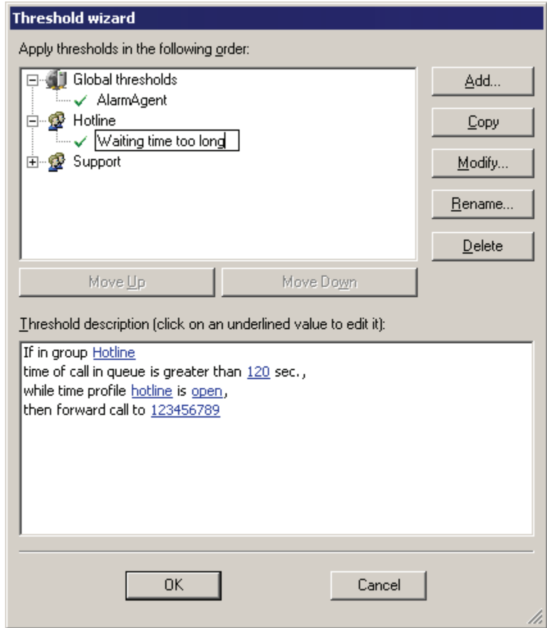


7. Assign an action to the definition in the **Action** field. Click the **Add** button afterwards. The action will be added to the list below. You may add several actions. Use the **Delete** button to delete an entry from the definition. In our example we select **then forward call to** so that, when the time profile is open, all callers who have been waiting for more than two minutes to get in touch with the “Hotline” ACD group will be routed to phone number 4711. Enter the telephone number afterwards.



8. Click the **Finish** button to complete the threshold definition.

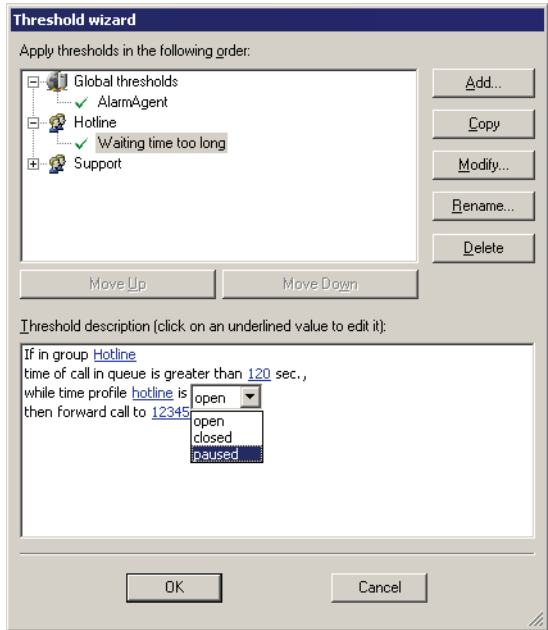
9. The name of the new threshold is at first **XXX**. To change the name select it and click **Rename**. Enter the desired name. In our case, the threshold has been called **Waiting time too long**.



NOTE: Thresholds are executed or checked in the sequence of their appearance in the list. Use the Move Up or Move Down buttons to change the position of a threshold.

9.3 Modifying Thresholds

Modifying a threshold is relatively easy. In the preview of a threshold selected in the Threshold Wizard (**Threshold description** field), specific elements of the threshold are displayed in blue and underscored.



Simply click these elements to edit them. Then either select a list entry or enter the value directly.

If you want to change the event or condition linked to the threshold, select the corresponding threshold and click the **Modify** button. Then proceed precisely as outlined in the threshold definition description (see Section 9.2, “Defining a new Threshold”).

9.4 Calendar Profiles

Calendar profiles are global XPR server resources and may be used by various clients (e.g. by a contact center). They generate a state for each entity from time and date. With the help of this state the program flow can be operated systematically. They may thus be used e.g. with threshold definitions. Here, an action will be initiated by requesting the state defined in the calendar profile (Open, Closed, Break). For further information please read the preceding chapters (starting from Section 9.1, “Administering Thresholds”, on page 63). For example, you may define exception rules with the help of the Threshold Wizard that consider special calendar profiles (opening times etc.). A rule could be as follows:

“If in group ***Hotline*** a new call arrives while the calendar profile ***Opening times*** reports status ***closed***, then forward the call to ***12345***.”

All elements of the sentence in bold are parameters defining the switching behavior.

A **calendar profile** is composed of calendar rules and day profiles. A calendar rule defines which day profiles are assigned to which weekdays respectively special dates. So it basically defines how the calendar profile is made up.

9.4.1 Creating a new Calendar Profile

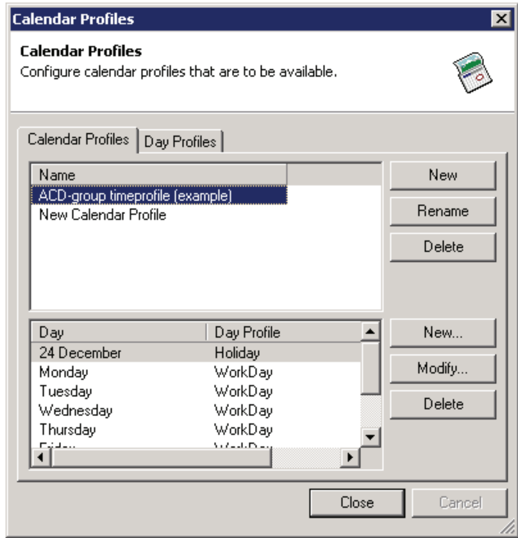
The following steps are necessary to create a new calendar profile:

1. Firstly, create the calendar profile.
2. Afterwards define the day profiles you need including the desired operating states and possibly actions that are linked to them.
3. Then create the calendar rules for the calendar profiles.

Creating a calendar profile

1. Select the **Calendar profiles** entry in the **Administration** menu.

   The dialog box **Calendar Profiles** opens.



   On this tab you perform the basic definition settings and the assignment of day profiles to specific weekdays or calendar dates.

   In the upper section of the window (below **Name**) the existing calendar profiles are listed. In the lower section of the window (below **Day** and **Day Profile**) the calendar rules for the calendar profile selected above are displayed.

2. Use the three buttons next to the upper window to create new calendar profiles or to edit existing calendar profiles.

   They trigger the following functions:

Button	Description
New	Creates a new calendar profile. It will be displayed in the window section to the left of this button below the name **New Calendar Profile.** The entry may be edited directly.
Rename	Via this button the name of a calendar profile may be changed at all times. Just select the calendar profile and confirm with this button. The profile name is released for editing at once.
Delete	Via this button calendar profiles no longer needed may be deleted from the list. The deleting refers to the currently selected calendar profile.

Table 1 Editing Features for Calendar Profiles

3. This step finishes by naming the calendar profile.

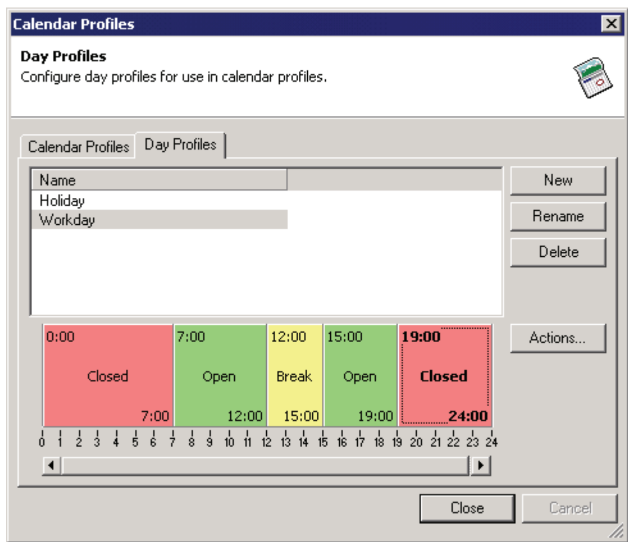
NOTE: A calendar profile must be selected to become editable. The associated weekday and date settings (calendar rules) are then displayed in the bottom section of the window.

Defining day profiles

The **Day Profiles** tab serves for defining the operating states that may come up within a 24 hours period of time (Open, Closed, Break).

1. Change to the **Day Profiles** tab.

   Here the existing day profiles are displayed in the upper section of the window below **Name**.



2. Use the three buttons next to the upper window to create new calendar profiles or to edit existing calendar profiles.

3. Select the period of time displayed in the lower section of the window. Thereby a dotted line will be displayed around this part which makes it easier to distinguish.

NOTE: Via the **Actions** button or the context menu you may define via the **Default** function which operating state you would like to specify for the 24-hour range.

---

4. Click the **Actions...** button to edit the period of time.

   Via this menu new periods of time may be inserted or the states may be modified.

   The following functions are offered in the **Actions** menu:

Function	Description
Status **[Space]**	Via this function and another submenu the current status of the selected section may be switched arbitrarily. Available are: • Open • Closed • Break The currently defined state is labeled with a preceding point and bold letters.
Combine **[F5]**	Combines two or more time periods of the same status. This function is only available if two neighboring time periods have the same state and one of these time periods is selected.
Delete **[Del]**	Deletes the time period selected in the profile.
New **[Ins]**	Inserts a new time period into the profile. The following states can be defined: • Open • Closed • Break
Default	The default state for the complete section may be preset here. This facilitates the definition of a day profile since, for instance, if the default state is “closed”, you only have to insert those time profiles where a differing state is needed. Possible are: • (None) • Open • Closed • Break. The currently defined state is labeled with a preceding point and bold letters.
Zoom In **[Page Up]**	For determining the time periods exactly in minutes, you may change the display scale. You may recognize the measure in the time scale that is displayed below the day profile window. Without enlargement, that is to say in the default state, the displayed time period includes 24 hours. The graduation is 30 minutes. In the first enlargement step the displayed time period is extended to 12 hours (graduation 15 minutes). In the next step it is extended to six hours (graduation five minutes), then to three hours with an exactness of one minute and in the last step to one hour (graduation again one minute). With the scrollbar you can also access periods currently not visible in the window.
Zoom Out **[Page Down]**	This function gradually cancels a previously performed magnification.
Properties	The single periods of time can be linked to additional actions. Possible actions are: • Playing announcements • Forward calls • Change the routing strategy. This modifies the logic of call distribution to the agents in the ACD group.

*Table 2 Editing Features via the **Actions** Menu*

5. Insert a new period of time into the selected one by selecting the desired state (**Open**, **Break** or **Closed**) via **New**.

NOTE: The new period of time overlaps the one that has been selected before.

---

6. Use the scroll bar to move to the end of the new time range. Move the right outside margin until the sector includes the desired time period.

NOTE: If required, magnify the representation scale for fine tuning.

---

7. Repeat the steps starting at step 5 to create new time periods until the day profile corresponds to your requirements.

Link actions to a time profile

You may link three different actions to any time period (Open, Closed, Break) within the day profile. The actions linked to a time profile here may be used with the threshold rules. The advantage of linking actions to a time profile is that more than one action may be performed at the same time.

The following actions are possible:

- Playing announcements
- Forward calls
- Change the routing strategy. This modifies the logic of call distribution to the agents in the ACD group.

The easiest way to install these actions is to select one or several of these actions at the same time in the context menu. Please proceed as follows:

1. Click the time profile that you would like to link with an action with the right mouse button. Alternatively, you may also click the **Actions...** button.

   The context menu opens.

2. Select the **Properties** entry in the context menu.

   The **Time Range Properties** dialog opens. Here you can select the desired action(s) here by ticking the corresponding check box:

   - **Playback file**

   If you have chosen the **Playback file** option, click the **Select...** button. A dialog opens and you may select a greeting from the existing default greetings or add new ones.

   - **Forward**

   If you have chosen the **Forward** option, you may enter the telephone number of the subscriber the call is to be forwarded to into the field below.

   - **Routing**

   If you have chosen the **Routing** option, you may set the **Longest Idle**, **Cycle** or **Linear** state with the help of the list box below, that is to say change the logic of the routing strategy.

3. Close the dialog with **OK**.

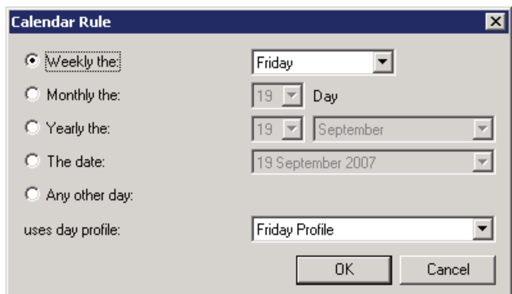
Edit calendar rule

The calendar rule defines which day profiles are assigned to weekdays respectively certain dates. The buttons next to the lower window serve to edit the calendar rules.

Button	Description
New..	Adds a new calendar rule to the selected calendar profile. The **Calendar rule** dialog opens for the definition.
Modify...	An existing calendar rule can be modified here (adopt, add or delete date respectively weekday settings).
Delete	Removes a selected calendar rule from the calendar profile.

Table 3 Editing Features for Calendar Rules

Via the **Calendar Rule** dialog certain day profiles are linked to weekdays respectively special dates.



Five date functions are available for a procedure as flexible as possible:

Date function	Description
Weekly the:	In the list box next to it the single weekdays may be selected for assigning a day profile. This function is used if different day profiles are necessary for the single weekdays (e.g. Saturday and Sunday).
Monthly the:	A day profile may be assigned here for certain recurrent days of the month. You may enter the corresponding day of month in the list box (1st to 31st).
Yearly the:	Here a day profile can be defined for certain recurrent yearly events (holidays etc.) Additional to this entry the day and month the event takes place may be defined here.
The date:	If for one unique special event an exception rule should be necessary, this date function may be used (e.g. for movable holidays). Here the day profile is assigned via a detailed date insertion.
Any other day:	This profile is assigned to all days that have not been assigned a separate day profile. Thus, this date function would be best set as default for the day profile mostly used.

Table 4 The Date Function to define the Calendar Rules

The day profile designed for the calendar rule is defined in the lowest list box. All day profiles already preset may be selected here.

A calendar rule would then look like this:

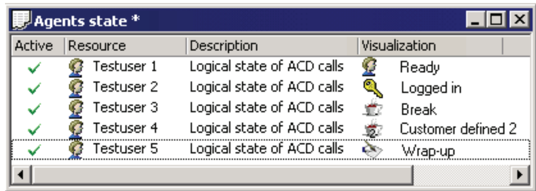
<date function> **uses day profile:** *<day profile name>*

Example:

Weekly the Sunday: uses day profile: Holiday Profile

10 Changing the Status of an Agent

One of the possible contact center variables that you can monitor is the current status of an agent. The current status of an agent is displayed in the monitor window:



The symbols have the following meaning:


The agent is in status “Ready”.


The agent is logged in to the contact center but has not activated one of the possible statuses (Ready, Break, Wrap-up).


The agent is in status “Break”.


The agent is in status “2” specified by the customer. This status can be recognized by the number displayed on the coffee mug.


The agent is in status “Wrap-up”.

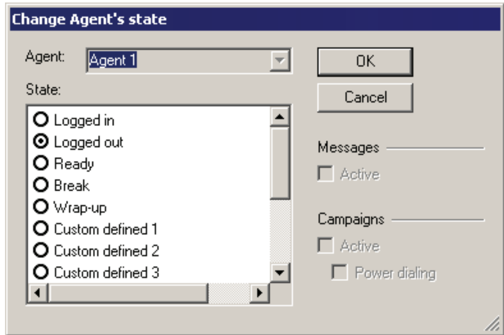
In some situations it might be necessary to assign a different status to an agent. This is possible in the **Change agent state** dialog:

1. Select an agent in the monitor window. You will find the name in the **Resource** column. Make sure that the entry **Current call state** is displayed in the same line (see **Description** column). If you would like to change several agent statuses at the same time, select the agent group in the monitor window whose agent status you would like to change. Make sure that the entry **List of associated agents** is displayed in the same line (see **Description** column).

2. Click **Change agent‘s state** in the **Administration** menu. You may also select this function from the context menu of the monitor window.

3. The agent or the agents of the selected ACD group will be displayed in the **Agent** field. Select the agent whose status you want to change from this list. The current status of this agent will be displayed in the **State** list. All possible statuses are listed there. On the left hand side a little circle is displayed. A dot in one of the circles shows the status the agent is currently in. With a click on another status you can modify the current status of this agent.

4. With the help of the checkbox below **Messages** (before the **Active** entry) you may set the agent active for messages. With the help of the checkboxes below **Campaigns** you may set the agent active for campaigns. If the agent is active for campaigns, he/she may additionally be set active for ’Power Dialing’ (cf. Chapter 8, “Campaign Management”).

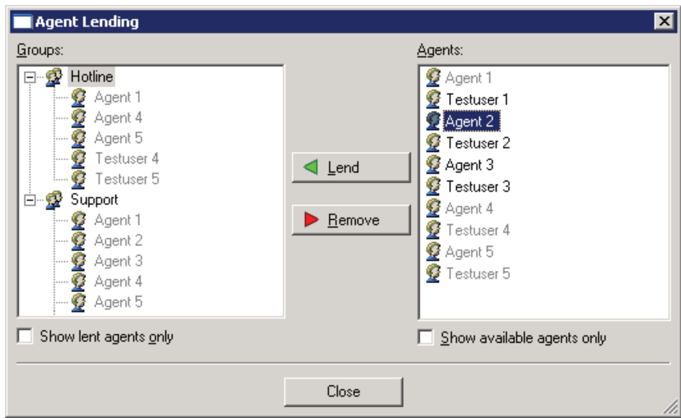


5. Click the **OK** button.

11 Lending Agents

Sometimes it is necessary to temporarily assign contact center agents to another ACD group. This may be the case in peak periods when an ACD group cannot cope with the workload while others are not that busy.

In the **Agent lending** dialog you can temporarily lend contact center agents to other ACD groups. To open this dialog click **Lend agent** in the **Administration** menu. The dialog consists of two parts displaying the current agent distribution.



In the left part of the dialog the **Groups** field displays all ACD groups of the contact center. Click the plus sign in front of a group name to expand the group. Expanded groups show a list of all associated agents under the group name. From an expanded group you can see which agents are currently assigned to it. Depending on the group membership, agents are displayed in different colors. All agents lent to a group are listed in black, while all regular members are listed in gray. By activating **Show lent agents only** you can restrict the display of the groups to lend agents.

The **Agents** list on the right of the dialog displays agents that can currently be lent (black). Those that cannot be lent appear in gray. By activating **Show available agents only** you can restrict the display to logged in agents.

The two buttons in the middle of the dialog allow you to lend agents or reassign them to their original group.

Lending an agent:

1. In the left list select the ACD group to which you want to lend an agent.
2. Select the agent you want to lend in the right list.
3. Click the **Lend** button.
4. Click **Close** to activate your settings.

Removing a lent agent from a group

1. Select the lent agent in the left list.
2. Click the **Remove** button.
3. Click **Close** to activate your settings.

12 Service Level

Service levels are used to display and evaluate the load of an ACD group. Service levels indicate the number of all calls that were taken by the agents within a certain time period (in %). The following applies in general: the higher the service level value, the less time a caller had to wait for his/her call being accepted. A low service level signals a long waiting time before an agent will take the call – i.e. the service level is poor and should be improved with the help of appropriate counter measures. An appropriate counter measure could be to lend agents to the respective ACD group.

Service levels can be evaluated via thresholds in a way that when a value is below or above a certain level, a specific action will be triggered (e.g. forwarding to another ACD group or reporting to a wall display). Further actions could be an acoustic and/or optical alarm in the ACD Supervisor.

12.1 Which Service Levels are available?

There are seven predefined service levels. The difference between them is basically the predefined time period whereas the time period for service level 1 and 2 is fixed and cannot be changed. The periods for service level 3 to 7 can be adjusted when setting up or editing ACD groups (see Section 7.5.2, “Time / Service Level”).

The following service levels of the ACD Supervisor are averaged over a time period. This time period is adjustable from 30 to 3600 seconds.

Service level	Description
1	Ratio (%) between the total number of calls in the ACD group and the number of calls connected to an agent. It is independent from the time the call might have spent in the call queue.
2	Number of calls (in %) which were directly connected to an agent, i.e. they spent no time in the call queue. Since the time while the agent telephone is ringing is also part of the waiting time, the agent must have a headset and the ACD must answer his/her phone immediately with connecting the call.
3	Number of calls (%) which were taken within 30 seconds (default time period). All calls are counted to determine the value. A call that spends a second in the waiting queue would be rated as not accepted within this period. The determination occurs via a time interval, since otherwise the service level would jump from 100% to 0% with the first call of the day.
4	Number of calls (%) which were taken within 60 seconds (default time period).
5	Number of calls (%) which were taken within 120 seconds (default time period).
6	Number of calls (%) which were taken within 180 seconds (default time period).

Service level	Description
7	Number of calls (%) which were taken within 240 seconds (default time period).

Tip: The contact center operator should select **one** service level from level 3 to 7 the time period of which suits his/her needs best, or he/she should determine within which time period a call is to be connected to an agent. This time period will then, for example, be entered for service level 3 and then monitored with the ACD Supervisor.

Normally it is pointless to show the levels 3 to 7 at the same time in the ACD Supervisor if the largest part of the calls has already been recorded by service level 3. The service levels 4 to 7 would then no longer show any differing value.

12.2 How do you calculate Service Levels?

Service levels indicate the ratio between the number of calls put through to an agent within a certain time period and the number of **total calls** for the ACD group. Total calls are calls in the call queue, calls waiting for the agent‘s answer (agent‘s telephone is ringing) and calls that were connected to an agent. The waiting time for a caller is defined as the time that passes until an agent answers his/her call. Consequently, the service level drops to a value smaller than 100% as soon as one caller is waiting.

Calculations for the service levels displayed in the ACD Supervisor are based on the current service level values which are collected continuously over a configurable time period. The average value of all values collected within that time period will then be displayed. The exact definition of the single service levels can be derived from the following formulas:

$$SL1 = \frac{100}{R} \cdot \int_{t_0 - R}^{t_0} \frac{G(t)}{G(t) + W(t)} dt$$

$$SL2 = \frac{100}{R} \cdot \int_{t_0 - R}^{t_0} \frac{G_{W = 0}(t)}{G(t) + W(t)} dt$$

$$SLx = \frac{100}{R} \cdot \int_{t_0 - R}^{t_0} \frac{G_{W \le W_{SLx}}(t)}{G(t) + W(t)} dt$$

This is based on the following:

1. The values required for the calculation at moment t_0 will be collected continuously from $t_0 - R$ to t_0 whereas R represents the monitoring period. R is preset to 300 seconds but can be adjusted individually for each ACD group.
2. Measurements are taken continuously during that time period. The Δ between the measurements is sufficiently small so that we can assume that the value of a measurement does not change until the next measurement is taken. We know such a staircase function from the integral that we use here for simplification.
3. The factor $\frac{1}{R}$ yields the arithmetic average over the monitoring period.
4. The factor 100 turns that into a percent value.

5. $G(t)$ is the number of calls at moment t which have just been connected to an agent. $W(t)$ is the number of calls at moment t which are in a call queue or are being connected to an agent (telephone of the agent rings). $G(t) + W(t)$ is thus the sum of all calls currently found in the ACD group.

6. Since the service levels indicate different ratios to the total number of calls $G(t) + W(t)$, the numerator will have different values:

Service level	Value in the numerator
1	$G(t)$, i.e. all calls that were connected to an agent. There will be a $Wert < 100$, if the caller hangs up in the call queue.
2	$G_{W=0}(t)$, i.e. all calls that were connected to an agent but did not spend time in the call queue. Since the time while the agent telephone is ringing is also part of the waiting time, the agent must have a headset and the ACD must answer his/her phone immediately with connecting the call.
3	$G_{W \le W_{SL3}}(t)$, i.e. all calls that were connected to an agent within the time period defined for service level 3 (default: 30 seconds).
4	$G_{W \le W_{SL4}}(t)$, i.e. all calls that were connected to an agent within the time period defined for service level 4 (default: 60 seconds).
5	$G_{W \le W_{SL5}}(t)$, i.e. all calls that were connected to an agent within the time period defined for service level 5 (default: 120 seconds).
6	$G_{W \le W_{SL6}}(t)$, i.e. all calls that were connected to an agent within the time period defined for service level 6 (default: 180 seconds).
7	$G_{W \le W_{SL7}}(t)$, i.e. all calls that were connected to an agent within the time period defined for service level 7 (default: 240 seconds).

If there is no call at moment t, i.e. the numerator is $G(t) + W(t) = 0$, the fraction in the integral above will be evaluated as 1. This means the service level is assumed to be 100% at this point in time.

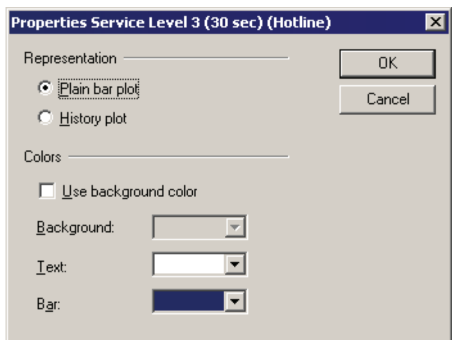
Example: We determine a service level for a period of 20 seconds. In the first ten seconds of this period, no caller was in the waiting loop, so the service level is 100 %. Then a call comes in, and it takes ten seconds until it is answered by an agent, which results in 0 % for this period. As a result, the service level reaches 100 % in the first ten seconds, but drops slowly to 50 % in the following ten seconds until the call is taken by an agent.

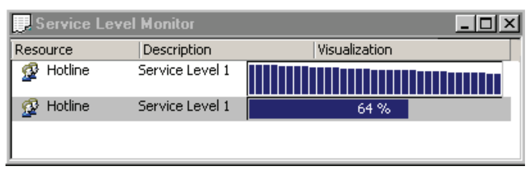
12.3 Changing the Appearance of the Service Level Monitor

The longer a caller has to wait in the call queue, the more the service level of the ACD group associated to the waiting loop or of the entire contact center drops. Therefore, service levels are graphically displayed all the time. The corresponding settings can be performed in the **Properties Service Level X** dialog (*X* stands for the service level number, from 1 - 7). Proceed as follows:

1. In the monitor window select the entry the **Resource** column of which contains the name of the ACD group for who you want to change the service level display. Make sure that in the **Description** column the entry “Service Level X” is present.

2. Click **Properties** in the **Monitor** menu. You may also use the context menu of the monitor window.





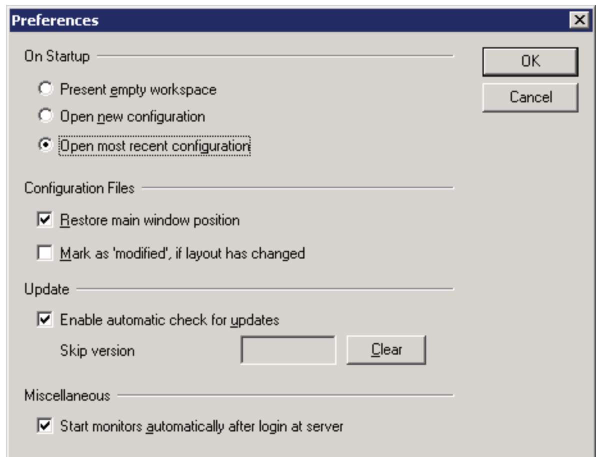
3. In the **Representation** section you can choose either **Plain bar plot** or **History plot**.
Plain bar plot displays a bar decreasing from the right, containing the current service level as percentage value (lower level in the illustration). The right hand side of the display represents a service level of 100% while on the left a service level of 0% is displayed. The advantage of this display format is that the current service level can be precisely read. This does not allow to gather information on the temporal development of the service level. For this reason the second display format shows the service level vertically. History plot uses small bars, running from the right to the left through the display (top level in the illustration). The bottom display margin indicates a service level of 0%, while bars approaching the top margin represent 100%. In this way you can determine the temporary service level development, in other words you can see whether it constantly remains on a low level or fluctuates.

4. The color of the service level display can also be altered. In the **Colors** section of the dialog you can select a color from the **Text** and **Bar** list for the text display within the service level bar and the color of the bar itself. If you want to choose a special background color, activate **Use background color** and select a color from the **Background** list.

13 ACD Supervisor Settings

13.1 General Settings

The **Preferences** dialog allows you to change certain settings of the ACD Supervisor. To open this dialog click **Preferences** in the **Edit** menu.



In the **On Startup** section, options are provided to determine the ACD Supervisor behavior at the program start. If you want to begin with an empty workspace, activate the **Present empty workspace** checkbox. A new configuration is automatically generated with each program start when you activate the **Open new configuration** checkbox. Activate **Open most recent configuration** if you want to continue working from where you stopped last time.

The **Configuration files** section allows you to register modifications of the workspace layout. Activate **Restore main window position** to make the ACD Supervisor remember the position of the workspace window when the monitor configuration will be closed.

In the **Update** section activate the **Enable automatic check for updates** checkbox, if the ACD Supervisor is to offer possible software updates at the program start. This requires a new ACD Supervisor version being available on the contact center server. When the program is started, this version will then be offered.

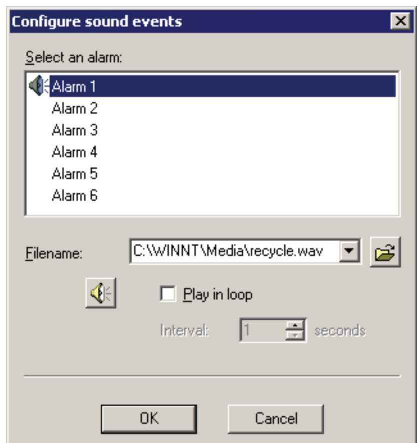
Activate **Start monitoring automatically** if you want to initiate monitoring immediately after program start. Otherwise you need to perform this manually via the **Monitor > Start monitoring** menu function (or icon bars).

13.2 Configuring Sound Events for Alarms

ACD Supervisor allows you to configure alarm sounds. Up to six different alarms can be configured visually as well as acoustically. The event that triggers an alarm is set with the Threshold Wizard (see Chapter 9, “The Threshold Wizard”). When this event occurs, the alarm is signaled visually and/or acoustically.

While the visual alarm configuration can be performed via the menu function **View -> Options**, the **Configure sound events** dialog provides the option to assign each alarm to a sound file. Proceed as follows:

1. Click **Alarm notification** in the **Administration** menu.



2. Select the alarm for which you want to define a sound file. The six alarms are displayed in the **Select an alarm** list. Alarms already linked to a sound file are indicated with a loudspeaker icon.

3. The sound file linked with the respective alarm appears in the Filename field. If no assignment exists yet, the entry **<None>** is displayed instead. If sound files have already been assigned to other alarms, these files can be selected. To assign a new file click the button with the folder icon and search for a file on your computer. If you have a sound card installed on your computer, you can listen to the sound file by clicking the loudspeaker icon.

4. Playback of the selected sound file is repeated by activating the **Play in loop** check box. Enter the desired repeat rate in the **Interval: seconds** field. Enter the value directly or use the regulator next to it.

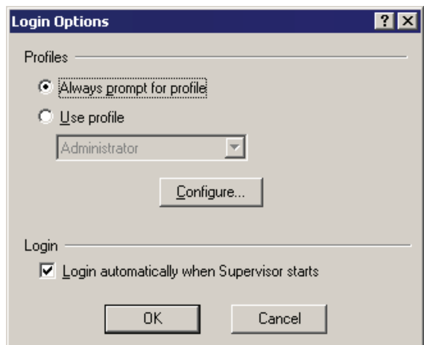
5. To edit another alarm select it and repeat steps 2 to 4.

6. Click **OK** to activate your settings.

13.3 Login Options

The **Login Options** dialog allows you to perform various settings that will effect the logon to the server. To open this dialog, click on the **Login options** entry in the **Server** menu.

If you want to be prompted for your login profile each time you log in, activate **Always prompt for profile**. If you always use a specific login profile, select the **Use profile** option. You can choose the desired user profile for login from the list below. Clicking the Configure button will open the Service Provider configuration dialog, which is used to manage your user profiles.



For further information on the Service Provider see the ’Server Administration’ manual.

If you want to automate the login process, activate **Login automatically when Supervisor starts** in the **Login** section.

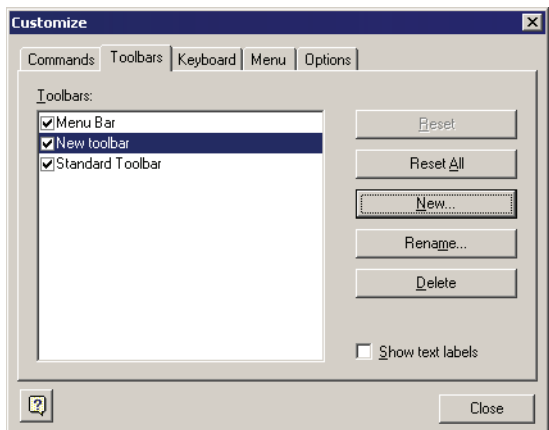
13.4 Toolbar and Menus

Toolbars, keyboard shortcuts and context menus of the ACD Supervisor can be adapted to your personal needs. You may, for example, add or remove menus and buttons, create customized toolbars, hide or show toolbars etc. Click **Customize** in the **View** menu. The following sections will describe each function in detail.

13.4.1 A new Toolbar

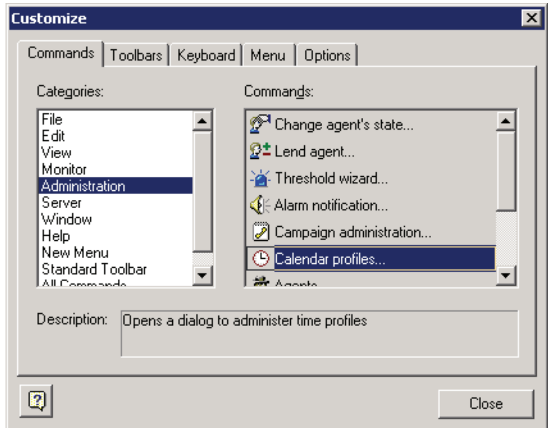
You can create new toolbars and edit or modify existing ones. Proceed as follows:

1. Click the **Toolbars** tab.



2. Click the **New** button and enter a name for the toolbar. The new toolbar will then be displayed in the ACD Supervisor.

3. Click the **Commands** tab.



Select the desired category and mark the command that you want to integrate in your personal toolbar. Keep the left mousebutton pressed to drag the selected command by drag&drop into the previously created toolbar.

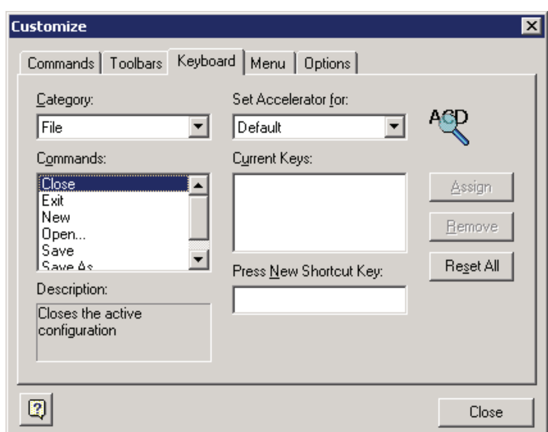
To add further commands to the toolbar repeat step 3.

As example you receive the following toolbar that you can freely move on the ACD Supervisor's graphical user interface:

13.4.2 Configuring Keyboard Shortcuts

You may define keyboard shortcuts for most of the program functions which will give you fast access to the resources that you use most.

1. Click the **Keyboard** tab in the **Customize** dialog.



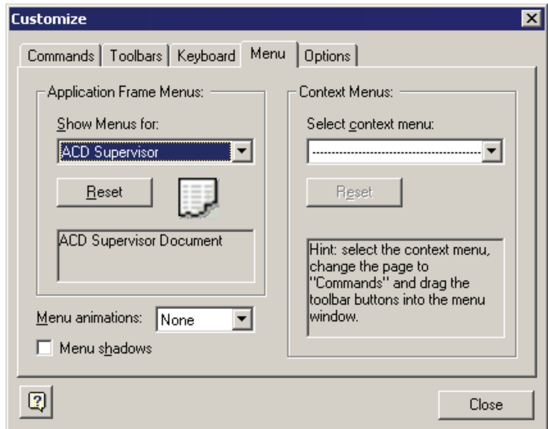
2. Select a **Category** and a **Command** for which you want to define a shortcut. The Current Keys field will tell you, if the select command has already been assigned to a shortcut.

3. Enter the new shortcut into the **Press New Shortcut Key** field.
4. Click **Assign**.

13.4.3 Context Menu

You may add additional features to or remove existing ones from the context menu.

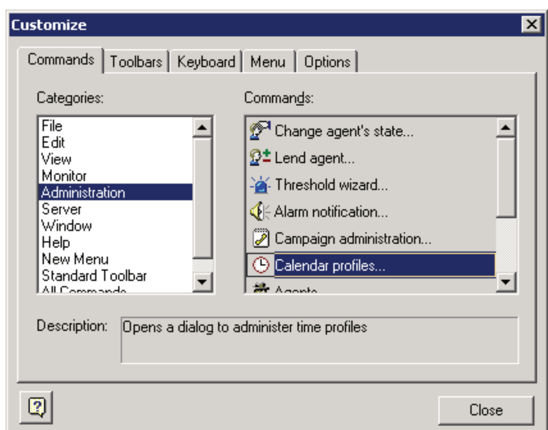
1. In the **Customize** dialog click the **Menu** tab.



2. Select the corresponding menu in the **Application Frame Menus** section and a context menu from the **Select context menu** list. The context menu will then be displayed.

3. Click the **Commands** tab.

4. Select a category from the **Categories** list and then a command from the **Commands** list.



5. Drag the command by drag&drop into the context menu.

To add further commands to the context menu repeat step 4.

The **Reset** button in the **Menu** tab will set the context menu back to its original state.

The Menu animation list allows you to define the animation of the ACD Supervisor menus (unfold, slide, fade).

A Appendix

A.1 The monitorable Variables of a Contact Center

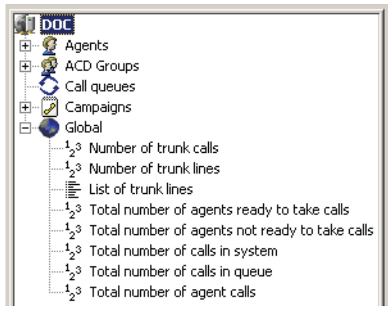
The contact center variables monitorable in the ACD Supervisor can be divided into five sections:

- Global Contact Center Variables
- ACD Group Variables
- ACD agent variables
- Campaign variables
- Waiting loop variables

The following chapters will list all monitorable contact center variables. The tables contain each the internal variable identifier with its meaning. The workspace shows the text shown in the Meaning column of the table. If, however, you create monitor templates, you have to use the internal variable identifiers that mostly consist of a three- or four-letter token (e.g. `NAR`).

A.1.1 Global Contact Center Variables

All global contact center variables will be listed in the following:

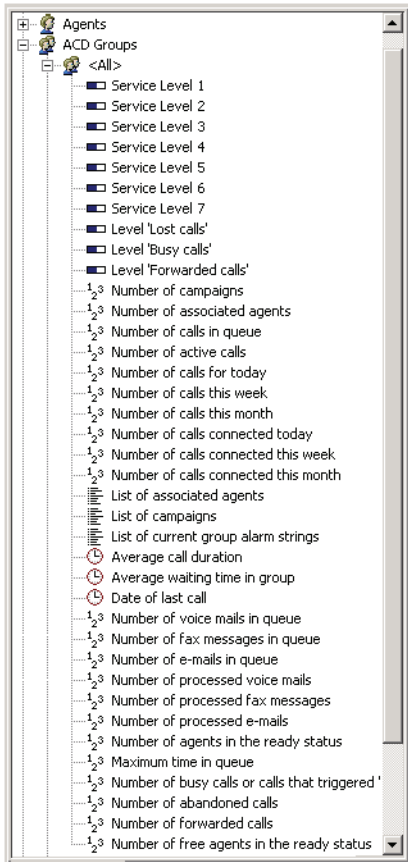


Displayed text	Meaning	Variable
Number of trunk calls	Number of trunk lines that are currently busy. The trunk lines must be configured in a way that their data can be displayed. Since monitoring the trunk lines is only mandatory for the contact center operation with employing remote agents, these data might not be available.	`NTC`
Number of trunk lines	Number of physical trunk lines (will not change during operation).	`NTL`
List of trunk lines	List of trunk lines. The trunk lines must be configured in a way that their data can be displayed. Since monitoring the trunk lines is only mandatory for the contact center operation with employing remote agents, these data might not be available.	`LTL`
Total number of agents ready to take calls	Total number of agents ready to take calls.	`NAR`
Total number of agents not ready to take calls	Total number of agents not ready to take calls.	`NNA`
Total number of calls in system	Total number of calls in system.	`NCA`
Total number of calls in queue	Total number of calls in queue.	`NLC`
Total number of agent calls	Total number of agent calls.	`NAC`

Table 1 Global Contact Center Variables

A.1.2 ACD Group Variables

These variables are used to monitor contact center groups (ACD groups). You may use these variables to create monitor windows and to define monitor templates. The following variables can be monitored:



Displayed text	Meaning	Variable
Service Level 1	Servicelevel 1.	`RSL1`
Service Level 2	Servicelevel 2.	`RSL2`
Service Level 3	Servicelevel 3.	`RSL3`
Service Level 4	Servicelevel 4.	`RSL4`
Service Level 5	Servicelevel 5.	`RSL5`
Service Level 6	Servicelevel 6.	`RSL6`
Service Level 7	Servicelevel 7.	`RSL7`
Level ’Lost calls’	Callers that gave up while waiting in the waiting loop in relation to all calls.	`RLC`
Level ’Busy calls’	Callers that received a busy signal in relation to all calls.	`RBC`

Table 2 *ACD Group Variables*

Displayed text	Meaning	Variable
Level ’Forwarded calls’	Callers that were forwarded in relation to all calls.	`RFC`
Number of campaigns	Number of campaigns.	`NCA`
Number of associated agents	Number of currently logged-in agents of the ACD group. Logged off agents are not included.	`NAT`
Number of calls in queue	Number of calls in queue.	`NWL`
Number of active calls	Number of active calls.	`NCC`
Number of calls for today	Number of calls for today.	`NCD`
Number of calls this week	Number of calls this week.	`NCW`
Number of calls this month.	Number of calls this month.	`NCM`
Number of connected calls for today	Number of calls connected today (incoming and connected to agent only).	`NCCD`
Number of connected calls this week	Number of calls connected this week (incoming and connected to agent only).	`NCCW`
Number of connected calls this month	Number of calls connected this month (incoming and connected to agent only).	`NCCM`
List of associated agents	List of associated agents. The current state of the agent will also be displayed.	`LTA`
List of campaigns	List of campaigns.	`LCA`
List of current group alarm strings	Lists the current group alarm strings for the ACD group.	`LAS`
Average call duration	Average call duration refers to the agent calls of this ACD group made during the last 15 minutes.	`NACD`
Average time in queue in group	Displays how much time the callers of this ACD group spent in the waiting loop during the last 15 minutes (on average) before they were connected to an agent. A threshold rule could be triggered after a certain waiting time that connects the caller to a voice box (answering machine). The ringing of the agent‘s telephone is also part of the waiting time.	`NACW`
Date of last call	Time and date of the last call in this ACD group.	`DLAC`
Number of waiting voice mails	Number of waiting voice mails for this group.	`NSFV`
Number of S&F fax messages in queue	Number of waiting fax messages for this group.	`NSFF`
Number of S&F e-mails in queue	Number of waiting e-mails for this group.	`NSFE`
Number of processed voice mails	Number of processed voice mails. This value refers to today only.	`NVD`

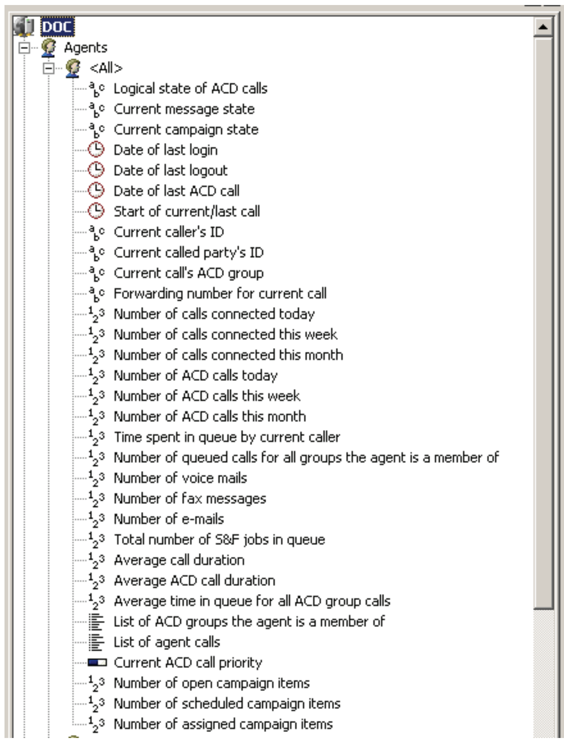
Table 2 ACD Group Variables

Displayed text	Meaning	Variable
Number of processed fax messages	Number of processed fax messages. This value refers to today only.	`NFD`
Number of processed e-mails	Number of processed e-mails. This value refers to today only.	`NED`
Number of ready agents	Number of ready agents.	`NAR`
Maximum time in queue	Maximum time in queue	`NMWT`
Number of calls that received a busy signal	Number of calls that received a busy signal. This value refers to today only.	`NCB`
Number of abandoned calls	Number of abandoned calls. This value refers to today only.	`NCH`
Number of forwarded calls	Number of forwarded calls. This value refers to today only.	`NCF`

Table 2 ACD Group Variables

A.1.3 ACD Agent Variables

The following variables are used to monitor activities and statuses of contact center agents:



Displayed text	Meaning	Variable
Logical state of ACD calls	Displays the current call status of the respective agent (Logged in, Ready, Break, Wrap-up).	`NCS`
Current message state	Displays whether the agent is ready to take messages. **Break** in the **Visualization** column does not mean that the agent is in status **Break** but that he/she is not ready to take messages.	`NCOS`
Current campaign state	Displays whether the agent is ready to take campaigns. **Break** in the **Visualization** column does not mean that the agent is in status **Break** but that he/she is not ready to process campaigns. **Ready power** means that the agent is also ready for power dialing.	`NCCS`
Date of last login	Date and time of the last login of the agent. If the last login was today, then the time will be displayed only.	`DLLI`
Date of last logout	Date and time of the last log off of the agent. If the last log off was today, then the time will be displayed only.	`DLLO`

Table 3 ACD Agent Variables

Displayed text	Meaning	Variable
Date of last ACD call	Date and time of the last ACD call for the agent. If the last ACD call was today, then the time will be displayed only.	`DLAC`
Start of current/last call	Start of current/last call.	`DCC`
Current caller‘s ID	Telephone number and/or name of the caller.	`SCID`
Current called party‘s ID	Telephone number and/or name of the called party.	`SCEI`
Current call‘s ACD group	Displays the ACD group of the current call.	`SCEA`
Forwarding number of for current call	Displays the forwarding number of the current call	`SRDI`
Number of calls for today	Number of calls today.	`NCD`
Number of calls this week	Number of calls this week.	`NCW`
Number of calls this month.	Number of calls this month.	`NCM`
Number of ACD calls for today	Number of ACD calls for today.	`NACD`
Number of ACD calls this week.	Number of ACD calls this week.	`NACW`
Number of ACD calls this month.	Number of ACD calls this month.	`NACM`
Time spent in queue by current caller	Time (in seconds) that the current caller spent in waiting loop.	`NLWT`
Number of queued calls for all groups in which the agent is a member	Number of queued calls for all groups in which the agent is a member.	`NWC`
Number of voice mails	Number of voice mails for the respective agent.	`NSFV`
Number of fax messages	Number of fax messages for the agent.	`NSFF`
Number of e-mails	Number of e-mails for the agent.	`NSFE`
Total number of S&F jobs in queue	Total number of messages waiting of all ACD groups for this agent.	`NWS`
Average call duration	Displays the average call duration.	`NCA`
Average ACD call duration	Displays the average ACD call duration	`NAAC`
Average time in queue for all ACD group calls	Displays the average time in the queue for all ACD group calls (in seconds).	`AWT`
List of ACD groups in which the agent is a member	Lists all ACD groups in which the agent is a member	`LCEA`
List of agent calls	Lists all agent calls.	`LAID`
Current ACD call priority	Displays the priority of the current ACD call.	`NCEP`
Number of open campaign items	Displays the number of open campaign items for all groups in which the agent is member.	`NOC`
Number of scheduled campaign items	Displays the number of scheduled campaign items for this agent.	`NSC`

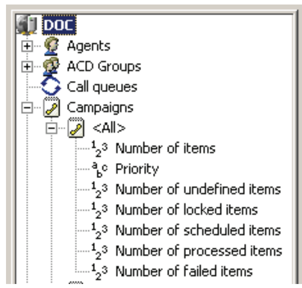
Table 3 ACD Agent Variables

Displayed text	Meaning	Variable
Number of assigned campaign items	Displays the number of assigned campaign items for this agent.	`NACA`

Table 3 ACD Agent Variables

A.1.4 Variables for Campaign Monitoring

The following variables can be used to monitor campaigns:



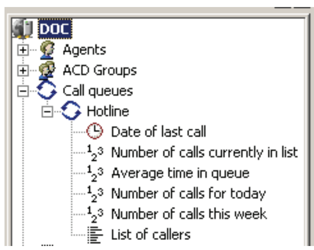
Displayed text	Meaning	Variable
Number of items	Displays the number of campaign items.	NIT
Priority	Displays the priority of the campaign item.	NPR
Number of undefined items	Displays the number of campaign items that have not been assigned to an agent yet.	NOI
Number of locked items	Displays the number of campaign items that were assigned to an agent and are therefore locked.	NLI
Number of scheduled items	Displays the number of campaign items that are scheduled.	NSI
Number of processed items	Displays the number of campaign items that were processed.	NRI
Number of failed items	Displays the number of campaign items that failed.	NFI

Table 4 Campaign Variables

A.1.5 Variables for Waiting Loop Monitoring

NOTE: Such waiting loop variables are only used for waiting loops not realized via the Application Generator/Vogue. They map the waiting loop realized with the PBX hardware and used at the contact center before the waiting loops were enabled via the Application Generator/Vogue. With the appropriate upgrades, this waiting loop might still be in use.
The variables of the ACD group should be used for the Application Generator/ Vogue combination.

Waiting loops, in which callers can be parked before they are put through, can be monitored with the following variables:



Displayed text	Meaning	Variable
Date of last call	Date and time of the last ACD call in queue. If the last call was today, then the time will be displayed only.	`DLAC`
Number of calls currently in list	Displays the number of calls in queue.	`NCL`
Average time in queue	Displays the average waiting time of the caller in the waiting loop.	`NCA`
Number of calls for today	Displays the number of today‘s calls in the waiting loop.	`NCD`
Number of calls this week	Displays the number of all calls in the waiting loop this week.	`NCW`
List of callers	Lists all callers with their telephone number.	`LAID`

Table 5 Waiting Loop Variables

A.2 Monitor Templates

Monitor templates are a practical means to provide other users of the ACD Supervisor having administrative privileges with specific monitor layouts. If such templates have already been stored during the ACD Supervisor installation, you can open a window constellation in the workspace for contact center monitoring with no detailed previous knowledge required.

While the use of monitor templates is relatively easy, their creation is a more difficult matter. When you generate monitor templates, a specific syntax and fixed structure must be heeded.

A.2.1 Creating Monitor Templates

How to create a new monitor template:

1. Access the ACD Supervisor installation directory. There you find underneath the directory that contains the `AcdSupervisor.exe` file a subdirectory named `template`. Move to this subdirectory.
2. Create a new text file there, e.g. `NewTemplate.txt`.
3. Open this file with a text editor and edit its contents according to the description in the following sections.

   After restarting the ACD Supervisor the newly generated template is included in the **File >New From Template** menu.

A.2.2 Monitor-Template Structure

A monitor template essentially consists of a so-called *General Section* and an arbitrary number of *Views*. In the general section, general Screen Structure Properties such as the arrangement of windows, the number of all available views etc. are defined.

A view represents a monitor window as you know it from the monitor area. For this purpose, specific monitor points are set within a view, respectively, selected call center parameters are monitored. You can define *general views* or views that are linked to specific contact center resources (agents, ACD groups, campaigns, waiting loops) (*resource-bound views*). General views create a single window where different values of all resources of a type are displayed. This is of advantage if you want to display dynamic values (for example the number of all ACD calls within various ACD groups) against each other to generate a clear structure. Views linked to single resources create a window for each available resource of this type to display the respective values to be monitored. In this way you can e.g. generate a window for each ACD group via the definition of a single resource-bound view to display service level 1 and all agents ready to answer a call. The definition of a view or the general section within a template file is introduced by square brackets. The structure of a template is as follows:

- General section (precisely one)
- General views (as many as you like)
- Resource based views (as many as you like)

Example: monitor template

```
[General]
Name=Test Layout
Description=This is an example for templates
Views=2
Cea=2
agent=1
Tile=horizontal

[View1]
name=Agents
AGENT,DLLI
AGENT,NCS

[View2]
name=Agent list
CEA,LTA

[Cea1]
Name=Agent List
NAT
LTA

[Cea2]
Name=Call numbers
NCD
NCW
NCM

[Agent1]
Name=Weakness
NCS
DLAC
NACD
NACW
NACM
```

A.2.3 The General Section

In the general section of a monitor template, general template properties are defined. Among these is the number of all general and resource based views.

Example: typical template structure

```
[General]
Name=Test Layout
Description=This is an example for templates
Views=2
```

```
Cea=2
agent=1
Tile=horizontal
```

The definition starts with the `[General]` label. Then come the agreements for its layout. For this purpose the name of the menu entry and the number of general and resource-bound views is specified. The window arrangement is configurable as well. The variables are separated from their values by equal signs. The following general settings can be defined for a template:

Variable	Meaning
`Name`	Name of the entry in the **File > New From Template** menu. The template can be selected via this entry.
`Description`	Description of the template definition purpose. This description is displayed in the ACD Supervisor status bar.
`Views`	The total number of general views.
`cea`	`cea` is the abbreviation for *Call Event Address*. A Call Event Address is the address an incoming call is routed to. This is usually an ACD group. This variable thus specifies the number of all views linked to ACD groups.
`AGENT`	Total number of all agent-related views.
`loop`	Total number of all views defined for monitoring waiting loops.
`campaign`	Number of all campaign-related views.
`tile`	This value determines the view arrangement. Possible values are *horizontal* or *vertical*. If this value is not specified, the windows appear cascaded on the screen.

A.2.4 General Views

General views in a monitor template serve to display values of different resources within a monitor window. Thus the definition of a general view is particularly useful if e.g. you want to directly compare the service levels of various ACD groups within a single window. Similar to the definition of a template‘s general section, this definition is also initiated with square brackets. View agreements start with number 1. The general structure of common views reads as follows:

```
[View<Number>]
name=<Descriptive name>
<Resources>, <Variable>
...
```

The name entered in `name` is used as monitor window caption. Then follows an arbitrary number of resource name combinations and variables separated by a comma. *<Number>* is the consecutive view index, starting with 1. Any number of `<Resource>, <Variable>` combinations may follow then. The following entries can be used as components:

Component	Possible entries
<Number>	Consecutive view definition index beginning with 1.
<Descriptive Name>	This name is used as window caption.
<Resource>	**CEA** Call Event Address, to be taken as ACD group variable (see Section A.1.2, “ACD Group Variables”). **AGENT** Variable related to ACD agents (see Section A.1.3, “ACD Agent Variables”). **CAMPAIGN** Campaign-related variable (see Section A.1.4, “Variables for Campaign Monitoring”). **LOOP** Refers to variables used for waiting loop monitoring (see Section A.1.5, “Variables for Waiting Loop Monitoring”). **GLOBAL** Refers to variables concerning the entire call center (see Section A.1.1, “Global Contact Center Variables”).
<Variable>	Suitable variable according to the type of resource used in *Resource*.

Example: two consecutive general view definitions

```
[View1]
name=Agents
AGENT,DLLI
AGENT,NCS
```

```
[View2]
name=Agent list
CEA,LTA
```

A.2.5 Resource-based Views

Resource-based views generate one window per available contact center resource when the monitor template is created. This way you can generate views that open an individual monitor window for each contact center agent to display specific variables. Resource-based views are defined consecutively, starting with view number 1. The structure reads as follows:

```
[<Resource name><Number>]
name=<Descriptive name>
<Variable>
...
```

An arbitrary number of variables can be monitored for a particular resource. The single <*Variable*> entries are to appear in a new line each for this purpose. The single components have the following significance:

Component	Possible entries
<*ResourceName*>	**CEA** ACD group view **AGENT** ACD agent view **CAMPAIGN** Campaign view **LOOP** Waiting loop view
<*Number*>	Consecutive view definition index beginning with 1.
<*Descriptive Name*>	This name is used as window caption.
<*Variable*>	Monitoring variable that matches the type of resource-bound view, i.e. campaign variables for campaign views etc.

Example: consecutive views for different resources

```
[Cea1]
Name=Agent List
NAT
LTA

[Cea2]
Name=Call numbers
NCD
NCW
NCM

[Agent1]
Name=Weakness
NCS
DLAC
NACD
NACW
NACM
```

Glossary

A

ACD

Automatic **C**all **D**istribution. Automatic forwarding and distribution of calls arriving via one calling number to a group of persons.

ACD Agent

One person of a group that is assigned calls by **ACD**. For example, a coworker at a contact center.

Alternate

Enables alternating between two external conversational partners without the waiting one being able to overhear the conversation.

C

Call Waiting (CW)

Call Waiting (CW). Euro-ISDN feature.
Calls arriving “during” an established connection can be signified visually and acoustically. If the caller transmits his/her calling number, the call can be accepted or rejected on grounds of the calling number displayed.

Communications

The standard XPR client, with which, among other things, all administrative tasks can be handled in connection with the Multimedia Contact Center. Thus defining users, ACD agents and groups; administering updates; assigning telephone device privileges.

Consult

Euro-ISDN feature.
Subscriber A can initiate a consultation while talking to subscriber B. He/she sets the call to hold and calls a third subscriber C. After terminating his/her consultation, subscriber A is automatically connected to subscriber B again. Carrying out a consultation requires the call hold (CH) function.

CTI

Computer **T**elephony **I**ntegration. Computer Telephony Integration. Enables PC-aided telephoning, for example dialing by mouse-click or when the telephone rings, information significant for the conversation appears automatically on the screen.

D

DDE

Dynamic **D**ata **E**xchange. Enables a dynamic data exchange between different Microsoft Windows applications.

H

Hold

Holding a connection. Call Hold (CH). Euro-ISDN feature.
If a second call arrives during a telephone conversation, the first call can be set on hold and the second caller talked to. Subsequently the first connection can be activated again and the conversation resumed. The two connections can also be alternated between. It is even possible to talk to two subscribers simultaneously ("Three Party Service“).

I

ISDN

Integrated **S**ervices **D**igital **N**etwork, service-integrating digital public telephone and remote transmission network. Digital network for the transfer of data, text, voice and images via a telephone line. A digital subscriber connection consists of a control channel with 16 Kbit/s (D channel) and two basis channels with 64 Kbit/s each (B-channels). With such a basic connection two services can be operated simultaneously, for example telephone and fax. For the ISDN protocol exists a large number of national, not compatible versions. Since 1993 a uniform ISDN protocol, the Euro-ISDN, has been changed to in Europe. Digitalization improves the transmission quality and rate compared to conventional analog transmission. Besides the basic connection, primary-multiplex connections with up to 30 B-channels are available.

L

LAN

Local **A**rea **N**etwork. Network restricted to an area, for example a building or a company site. In most cases this is an information network or bus system, via which flows of information as regards company data registration, controlling and monitoring are routed. PC’s, servers, peripheral devices, machines and robot controls are directly connected to it. Software available on servers is provided to everybody, periphery can be used by several stations.

Local Database (Cache)

Every client application does not have to keep its own database up to date. If required the Service Provider synchronizes its local database with the database of the server. Thereby the contents of the local database is made available to all client applications so that fast access is enabled any time.

S

Server

Network station that offers services to other stations (clients) and provides resources.

Store & Forward Interface

Client applications can send documents to or receive them from a server. This is a matter of classic communication via fax, e-mail, etc.

T

TAPI

Telephony **A**pplication **P**rogramming **I**nterface. The TAPI interface provides telephony services on Windows computers by coupling a PC with a telephone.

TCP/IP
Transmission Control Protocol/Internet Suite of Protocols. Network protocol, generally approved standard for data exchange in heterogeneous networks. TCP/IP is used in local networks for the intercommunication of different computers as well as for the access from LAN to WAN.

Three Party Service (3PTY)
Three Party Service (3PTY). Euro-ISDN feature.
Describes the interconnection of three subscribers than can simultaneously telephone with each other. This requires the call hold (CH) function.
Also PBX feature.

Transaction Interface
Client applications can communicate with APLs of the server which support transactions. This enables in particular the CTI functionality for client applications such as optiClient.

V

Visual Basic
Microsoft Basic dialect. Basic is a programing language.

W

WAN
Wide **A**rea **N**etwork. Wide area network using the telephone network.

WAP
Wireless **A**pplication **P**rotocol. Global standard for the wireless data access and the information transmission of Internet and Intranet applications, for example by cell phone.

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