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Nortel Networks Symposium Call Center Web Client

Supervisor's Reference Guide

Product release 4.5/SU03 Standard 3.0 April 2004

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Publication history

April 2004	The Standard 3.0 version of the *Nortel Networks Symposium Call Center Web Client Supervisor's Reference Guide*, Release 4.5, is released.

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Overview

Introduction

Symposium Call Center Web Client enables call center supervisors and administrators to manage and configure the call center and its users, define access to Symposium Web Client applications and data, and view real-time and historical reports through a web browser on their desktop.

Symposium Web Client contains the following components:

- Contact Center Management
- Real-Time Reporting
- Historical Reporting
- Access and Partition Management
- Configuration
- Scripting
- Emergency Help
- Agent Desktop Displays
- Audit Trail

Of these components, call center supervisors typically use Contact Center Management, Real-Time Reporting, Historical Reporting, Emergency Help, and Agent Desktop Displays. This guide discusses these components. For information on the remaining features, see the online Help included with the application, or the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*.

The role of the supervisor

As a supervisor, you are responsible for a group of agents. You

- monitor agent and call center performance
- provide support (for example, if the agent has an abusive call)
- report and resolve any problems (such as poor service levels)

- help develop schedules to ensure adequate staffing levels
- analyze reports, and participate in planning, forecasting, and trend analysis

From your computer, you can open Internet Explorer (Version 6.0 Service Pack 1 or later), log on to Symposium Web Client, and use any of the components to which you have access to monitor and support your agents.

Note: Internet Explorer Version 6.0 Service Pack 1 or later is one of the requirements for the client PC. For a complete list of the client PC minimum requirements, see the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*.

Contact Center Management

You can use Contact Center Management to create and manage call center supervisors and their agents. When you need to cover breaks, vacations, and other times when a supervisor is unavailable, you can also use Contact Center Management to create agent to supervisor assignments. You can schedule these assignments to occur on a regular basis, or you can create and activate them to take effect immediately.

Real-Time Reporting

Supervisors and call center managers can use the real-time displays in the Real-Time Reporting component to monitor the current performance of the call center. The displays provide up-to-the-minute information, such as

- number of calls waiting
- average and maximum wait times
- number of calls abandoned
- number of agents logged on to a skillset
- number of agents busy on calls
- number of agents idle

If a problem occurs (for example, if wait times or number of calls waiting increase suddenly), you can detect it immediately by viewing real-time displays. You can then take appropriate action to resolve the problem (such as assigning additional agents to the backlogged skillsets).

Example: At 9:00 a.m., Pat Wilson, the supervisor for the Bookings skillset, notices in the real-time displays that the number of calls waiting for agents in the Bookings skillset has jumped from the typical 3 to 15. The average wait time has also increased from 30 seconds to 2 minutes. He immediately assigns other agents to the skillset in Contact Center Management, and logs himself on as an agent assigned to the Bookings skillset. The situation begins to improve by 10:00 a.m., and by 11:00 a.m. call levels are back to normal. Pat restores all agents to their usual skillsets and logs off the Bookings skillset.

Historical Reporting

Call center managers and supervisors can use the reports in the Historical Reporting component to detect trends and seasonal behavior, and to forecast future activity. For example, you can report on the number of calls to a skillset

- during different times of the day
- during different months of the same year
- for the same month in different years

By comparing statistics for different times of the day, you can identify peak periods. By comparing statistics for different months, you can identify seasonal behavior. By comparing the same month across different years, you can identify trends.

Example: Pat Wilson uses the Skillset Performance report to investigate the sudden rise in activity. He generates interval reports for the period from 9:00 a.m. to 11:00 a.m. for several days in a row. He can clearly see the growth and notes that the behavior was unusual for that time of day. However, he is not able to explain it until he learns that BestAir was profiled on a radio morning show on the day the growth occurred.

Emergency Help

You can open the Emergency Help panel on your desktop to monitor whether any agents have pressed the Emergency key on their phonesets, indicating that they require your assistance.

Agent Desktop Displays

Agent Desktop Displays is a Windows-based tool that provides skillset monitoring to Symposium Call Center Server agents. Agents or supervisors can log on to Agent Desktop Displays using their phoneset logon ID and view statistics for each skillset to which they belong.

Note: Before you or any of your agents can use the Agent Desktop Displays, your administrator must install and configure the software on the application server and on each client PC that is used to access the displays. You must also have the Real-Time Reporting component installed and configured on the application server for Agent Desktop Displays to function properly.

Scope of this guide

The *Symposium Call Center Web Client Supervisor's Reference Guide* provides an overview of the Symposium Web Client features that supervisors use most often while managing and monitoring the call center. This guide describes the main differences between the Symposium Call Center Server client and Symposium Web Client; it does not provide detailed procedures for working in Symposium Web Client. All procedural information is located in the online Help for each component.

Who should read this guide

This guide is for Symposium Call Center Server administrators and supervisors who are responsible for managing call center resources and monitoring call center performance using Symposium Web Client. It is intended for users who can access and use the Historical Reporting, Real-Time Reporting, Contact Center Management, Agent Desktop Displays, and Emergency Help components of Symposium Web Client.

New features in Symposium Web Client

Introduction

Symposium Web Client offers a new web browser interface that enables call center supervisors and administrators to configure and manage their call center.

Unlike the Symposium Call Center Server client, the application software for Symposium Web Client does not have to be installed on your computer. Instead, it is installed on a single network computer, called an application server, that you can access from your computer using Internet Explorer Version 6.0 Service Pack 1 or later. This centralized software location is beneficial for a number of reasons:

- It reduces the amount of space required on your computer to run Symposium Web Client.
- It enables the distributor to install the application software only on the application server, instead of installing it on every client computer.
- It enables you to have access to the latest version of the software without having to wait for upgrades to be installed on your computer.
- It enables you to access the historical reporting templates on the application server, rather than having them occupy a lot of disk space on your computer.

Common elements in Symposium Web Client components

While each Symposium Web Client component that you use has its own distinct purpose and function, all components have the following common elements:

- **System tree** Each component has a system tree in the left pane of the window that lists all the servers in Symposium Call Center Server to which you have access. You log on to a server on the system tree to view and work with the agents configured on it, and to view the server data in the real-time and historical reports.
- **Message pane** Each component has a message pane at the bottom of the window where system messages appear, informing you of successful or failed operations.

- **Menus** The Launchpad and Help menus for each component are the same. These menus enable you to switch from one component to another without logging off the application server, access online Help on any window in the application, and access both the *Symposium Call Center Web Client Supervisor's Reference Guide* and the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*.

  Note: The new features described here are those within the components that call center supervisors typically use: Contact Center Management, Real-Time Reporting, and Historical Reporting. For details on the other Symposium Web Client components, see the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*.

New features

Contact Center Management

You can use Contact Center Management to add, edit, view, or delete Symposium Call Center Server users (the call center supervisors and agents). You can also create, save, and schedule agent to supervisor and agent to skillset assignments.

Contact Center Management offers the following new features:

- **Four main data views** Contact Center Management is separated into the following four main data views, each accessible from the View/Edit menu:
  - **Supervisor** The default view that appears when you first open Contact Center Management. You can use the windows in this view to quickly see the supervisors who are configured on each server on the system tree, list the agents assigned to each supervisor, and immediately assign agents to supervisors (create ad hoc assignments).
  - **Agent** You can use the windows in this view to search for particular agents or list all agents on a server. Once you have located the desired agent, assuming you have been granted the appropriate access class, you can view and edit the agent's properties, including the skillsets and partitions to which the agent is assigned, delete the agent from the server, and quickly create a new agent by copying the current agent's properties.

- **Skillset** This view enables you to create new ad hoc agent to skillset assignments and change the priority of skillsets already assigned to agents.
- **Assignment** Assuming you have the appropriate access class, this view enables you to view and edit saved and scheduled agent to skillset and agent to supervisor assignments and create new saved and scheduled assignments.

When you click any of these options, the system loads the corresponding type of data in the system tree. Before you can work with each type of data, you must first click a server name in the tree to log on to the server and view its agents, supervisors, and skillsets.

- **Assigning agents to partitions** Users with the appropriate access class can now use the User Details window in Contact Center Management to assign agents to partitions instead of only being able to do so in Access and Partition Management.

Note: Users can assign agents only to those partitions to which they have been given access.

- **Drag and drop** You can use this feature only in supervisor view to quickly reassign agents to supervisors by left-clicking and dragging the agent icon on the system tree and dropping it on the new supervisor icon.
- **Reset assignments** When you create a saved or scheduled agent to supervisor or agent to skillset assignment, you can choose to make a reset assignment. A reset assignment is a record of the original data that existed at the time you created the assignment. For example, it contains a record of the original list of agents assigned to a supervisor before you create an agent to supervisor assignment. It enables you to change and run the assignment as many times as you require, and then run the reset assignment to return conditions to their original state. To create a reset assignment, you must click the **Create Reset Assignment** check box when saving or scheduling an assignment.
- **Agent searching** When you need to quickly reassign agents to a particular supervisor or skillset, you can use the agent search feature to find particular agents on a per-server basis. You can search by up to five different criteria: first name, last name, login ID, department, or comment. This feature appears in each of the four main data views in Contact Center Management.

- **Access classes for Contact Center Management** When your administrator configures your user profile in Access and Partition Management, he or she assigns you an access class that restricts the actions that you can perform in Contact Center Management. Based on your access class, you may only be able to view data in the supervisor, skillset, and agent views, but nothing in the assignment view, which requires a different combination of access levels.

  In addition to controlling the actions that you can perform, your administrator can assign the *Use Agent & Skillset Partitions in CCM* access level to you to restrict the skillsets that you can view in Contact Center Management to *only* those included in your partitions. If your administrator does not assign this access level to you, then you can view all skillsets in the windows and on the servers to which you have been given access. If you need to work with a particular window or type of data in Contact Center Management, but you cannot access it, contact your administrator and request that your access class be modified.

- **Agent and skillset partitions** Administrators create partitions in the Access and Partition Management component of Symposium Web Client. Partitions enable administrators to specify the agents that supervisors can see in Contact Center Management. In addition to controlling the agents that you can see, your administrator can also include particular skillsets in your partition, and then restrict you to seeing *only* these skillsets by assigning the *Use Agent & Skillset Partitions in CCM* access level to you.

  This level of data control is particularly useful in a call center shared by several companies. Administrators can create separate partitions containing the agents who work for each company and the skillsets the agents are assigned to and then assign these partitions to the appropriate supervisors, thereby restricting the supervisors' view of the call center. If your administrator does not assign *any* partitions to you, then you see *all* agent data in Contact Center Management, even if he or she has assigned a supervisor/reporting agent combination to you. For more information on the supervisor/reporting agents feature, see below.

- **Supervisor/reporting agents feature** This feature works in conjunction with partitions to restrict you to seeing only your reporting agents in Contact Center Management. However, this feature only works if your administrator also assigns a partition to you. If your administrator assigns a supervisor/reporting agent combination to you, but no partition, then you see *all* agents in Contact Center Management.

Administrators can use this feature to associate call center supervisors and all their reporting agents with your Web Client user profile. An administrator can, for example, associate your Web Client user profile with your supervisor profile, thereby enabling you to view *all* your reporting agents in Contact Center Management, and work with these agents when you create assignments (if you have the correct access class to create assignments). Alternatively, by linking another supervisor's profile with your Web Client user profile, the administrator enables you to act as the agents' *associated* supervisor. Unlike partitions, which must be manually updated when a new agent is assigned to a supervisor, supervisor/reporting agent combinations are dynamic: when a user assigns an agent to a supervisor, the agent is automatically included in the corresponding supervisor/reporting agent combination.

Real-Time Reporting

The Real-Time Reporting feature enables call center supervisors to monitor their call centers effectively by viewing up-to-date, continuous call center statistics in the real-time displays. Real-time statistics enable supervisors to quickly respond to changes in call volume so that the call center can make better use of its resources and, therefore, better serve its customers.

Real-Time Reporting offers the following new features:

- **Sharing of private real-time displays** After you have customized a real-time display and saved it in your Private displays folder, you can share the display with other users by making a public copy of it. You can choose to copy the display to the Public displays folder only on the currently selected server, or across all servers to which you have access in the network. The copied display retains all your customized settings except filter information. Like all standard public displays, public copies of private displays contain no filter information. To add filters to these public displays, users must make private copies of them first. Once you make a public copy of a private display, only the administrator (when logged on as *webadmin*) can delete the display. To modify the display, you or any other user must first make a private copy of it.
- **Resizing of agent map displays** A zoom option enables you to resize the box view agent map displays to 75 percent and 50 percent of their normal size. The resizing option does not apply to agent maps when they are shown in icon view. When you resize an agent map, the text within the agent blocks is also resized, and the relative position of the icons is maintained. If

you resize an agent map to 50 percent of its normal size, then the spacing between the agent map icons is halved.

- **Agent map header options** You can now customize your agent maps by choosing whether to display the following combinations in the icon header:
  - agent first name, followed by last name
  - agent last name, followed by first name
  - agent first name and logon ID
  - agent last name and logon ID
- **Supervisor/reporting agents feature** Administrators can use this feature to associate call center supervisors and all their reporting agents with your Web Client user profile. An administrator can, for example, associate your Web Client user profile with your supervisor profile, thereby enabling you to view *all* your reporting agents in the real-time displays. Just as you assign filters to your private real-time displays, you can also assign supervisor/reporting agent combinations to them. These combinations are like filters containing agents, except that you cannot specify the agents you want to see. Instead, when you assign a combination to a display, you see *all* the supervisor's reporting agents.

  Note: You can apply the supervisor/reporting agent combinations only to private agent real-time displays and agent map graphical displays; you cannot view supervisor/reporting agent combinations in public real-time displays.
- **New columns on standard display** When you are in Real-Time Reporting and you connect to a Network Control Center (NCC) server that is running Release 5.0 or later of the Symposium Call Center Server software, the standard Network-Consolidated Skillset display contains two new data columns:
  - Maximum Waiting Time
  - Longest Waiting Time Since Last Call

  Note: These columns are not available when you connect to an NCC server that is running previous releases of the Symposium software.

Historical Reporting

The Historical Reporting component enables you to produce nodal and network-consolidated reports detailing the past performance of the call center. As with the Symposium Call Center Server client, in Symposium Web Client you can still specify the data range of the reports, schedule them to run at a specific time, and apply selection criteria to them.

Historical Reporting offers the following new features:

- **Improved choices for scheduling reports** When scheduling a daily, weekly, or monthly report, you have the option of choosing any of the following new options:
  - from *x* days/weeks/months ago to *y* days/weeks/months ago
  - *x* days/weeks/months ago
  - *0* weeks/months ago

  These new choices enable you to schedule your report more efficiently.
- **Improved e-mail notification** You can specify one or more e-mail addresses where the system can send notification that the report has been generated successfully, or that there were problems preventing the report from being generated. If the system cannot generate the report, the e-mail notification contains possible reasons for the failure, enabling you to repair the problem and generate the report again.
- **Paper size** When you choose to output the report to a printer, you can select the paper size for your report.
- **Activation and deactivation of scheduled reports** You can now activate and deactivate scheduled reports from within the scheduling area in the main Historical Reporting window instead of opening the Scheduled Events window. This feature enables you to create, schedule, and activate a report in the same window.
- **Importing user-created reports** When you import a user-created report that is based on historical data (as opposed to configuration data), the Template Importing Wizard enables you to choose the type of data range for the report. For historical user-created reports, you can choose from all four data range types: interval, daily, weekly, and monthly. When you finish importing the report, click the report in your Private Report Templates folder to further define the data range, schedule the report, and specify the output options.

Unlike user-defined reports, you cannot change the data range type for user-created reports that you have imported with the Template Importing Wizard. To change the data range type for a user-created report, you must import the report again with the new data range type.

- **Importing user-created parameter reports** You can also use the Template Importing Wizard to import into Symposium Web Client parameter reports that you have created and saved in the Crystal Reports application. A parameter report is a Crystal Reports template with special parameter fields that require the user to enter or select data at the time of running the report. Some examples of parameter fields that may require user input are the date and time. When you finish importing the report, click the report in your Private Report Templates folder to select the values and run the report. Since parameter reports require user input at the time of running, you can only run these reports on an ad hoc basis; you cannot schedule parameter reports. You also cannot save the values that you select when you run the report. Instead, each time you run the report, you must select the parameter values.
- **Skillset by Agent report** This new report template enables you to report on agents who work with multimedia skillsets (such as e-mail and text chat skillsets) and to manually specify the skillsets that you want to see in the report. The report is available for the following data ranges:
  - Interval
  - Daily
  - Weekly
  - Monthly

  Notes:

  - With the Symposium Web Center Portal Keep-call model, the Talktime in the Skillset By Agent report indicates the multimedia contact handling time for the skillsets that are known to relate to a certain medium.
  - With the Symposium Web Center Portal Drop-call model, PostCallProcessing time is actually the contact handling time, since this is the time between the start of the Agent Not Ready condition (after accepting the contact), and the agent going idle (when the present contact is finished).

- **Improved user interface** The new user interface in Historical Reporting compresses each of the main areas of the Report Properties window—the report properties, scheduling, output options, and selection criteria areas—into its own separate section that you can collapse or expand by clicking the section heading. This new design makes it easier to work with reports since you no longer have to view sections that are not applicable to your report (for example, if you are not scheduling the report, then you do not have to view the scheduling section of the window).

- **Filter sets** The filter sets feature enables you to select the sites and resources to be included in a network-consolidated report. After you create and save a filter set, you can apply it to both standard and private network-consolidated historical reports to view only the information that you specify in the generated report. When you connect to a Network Control Center server, open a network-consolidated report, and open the Selection Criteria area of the Report Properties window, click the **Filter Sets** heading to view the available filter sets for this report.

  When you create a filter set, you can specify the applications, DNISs, routes, and skillsets that you want to see in both standard and private network-consolidated historical reports. You can choose from among those items included in the partition assigned to you. You can select multiple resource items across multiple sites in your network and save them in one filter set.

  Note: A user with administrator privileges must assign a partition to you before you can configure filter sets. If there are no skillsets, applications, DNISs, or routes from which to choose when you create the filter set, then you do not have a partition assigned to you, and you must contact your call center administrator.

- **New network-consolidated historical report** When you are in Historical Reporting and you connect to a Network Control Center (NCC) server that is running Release 5.0 or later of the Symposium software, there is a new network-consolidated report that is available to you: the Network Consolidated Skillset Call Distribution report. This report provides you with a means of monitoring how network calls are distributed across network nodes, on a per-skillset basis, and from a source node perspective. This report differs from the existing Network Consolidated Skillset Performance report, which displays routing data from a target node perspective.

Access rights in Symposium Web Client

Introduction

Symposium Web Client contains new features that enable call center administrators to control your access to Symposium Web Client and all call center data.

Access types

The administrator uses the Access and Partition Management component to control your access in four ways:

- basic access rights
- access classes
- partitions
- supervisor/reporting agent combinations

For a description of each category, see the appropriate section below.

Basic access rights

When configuring your user profile, the administrator must first grant you basic access rights to the Symposium Web Client components that you need to use (for example, Real-Time Reporting, Historical Reporting, Contact Center Management, and Emergency Help).

Access classes

Then, only if you are going to use Contact Center Management, the administrator must assign an access class to you that contains the appropriate access levels within each of the four access class elements related to Contact Center Management:

- *CCM* access
- *Agent to Supervisor Assignment* access

- *Skillset Assignment* access
- *CCM Partitions* access

Your access class determines the actions that you can perform in Contact Center Management, and the skillsets that you can see (if the *Use Agent & Skillset Partitions in CCM* access level is assigned to you).

Apart from the above access class elements, all other access class elements listed in Access and Partition Management are for the Configuration and Scripting components. You do not require an access class to use Real-Time Reporting, Historical Reporting, or Emergency Help.

CCM access class element

Within the *CCM* access class element, your administrator can choose one of eight access levels to assign to you. For a description of each level, see the online Help included with Symposium Web Client:

- *None*
- *View Agent Properties*
- *Edit Agent Properties*
- *Edit Agent Properties Including Partitions*
- *Add/Edit/Delete Agents*
- *View Agent and Supervisor Properties*
- *Edit Agent and Supervisor Properties*
- *Add/Edit/Delete Agents and Supervisors* (this access level is usually reserved for users with administrator rights)

Note: If you have been granted the *Edit Agent Properties Including Partitions* access level, then you can assign agents to partitions from Contact Center Management, instead of having your administrator do so from Access and Partition Management. You can assign agents only to those partitions to which you have been given access.

Skillset Assignment and Agent to Supervisor Assignment access class elements

Within the *Skillset Assignment* and *Agent to Supervisor Assignment* access class elements, your administrator can choose one of four access levels to assign to you, with each progressive level including the rights of the preceding level:

- *None*
- *View Assignments*
- *Create Ad hoc Assignments*
- *Schedule Assignments*

Each access level determines the windows that you can open and the actions that you can perform in these windows. The access level *Create Ad Hoc Assignments* is specifically for users who are responsible for only creating ad-hoc agent to skillset and agent to supervisor assignments. These users can only view, create, and change ad hoc assignments; they cannot schedule assignments.

For agent to skillset assignments, your administrator can restrict not only the type of assignments you can create by selecting the appropriate level from the Skillset Assignment access element, but the skillsets that you can include in the assignments by also using the *Use Agent & Skillset Partitions in CCM* access level within the CCM Partitions access element. If your administrator assigns you this access level, then you can only assign skillsets that are in the partition assigned to you. If your administrator does not assign this access level to you, or if you do not have a partition, then you can work with all skillsets configured on the server.

Users with the *Add/Edit/Delete Agents and Supervisors* access level and the *Schedule Assignments* access level for both types of assignments can perform all actions in Contact Center Management.

CCM Partitions access class element

This access class element is designed to control the skillsets that you can view in Contact Center Management—either all skillsets configured on the servers to which you have access, or only those skillsets included in the partitions assigned to you.

Note: In Contact Center Management, the agents who a user can view are always limited to those included in the user's partition. The access level you assign to a user has no effect on the agent partitions.

There are two access levels under this heading:

- ***Use Agent Partitions in CCM* access level** This is the default value under this access class element. If your administrator assigns this level to you, then you are able to see *all* skillsets configured on the servers to which you have access.
- ***Use Agent & Skillset Partitions in CCM* access level** If your administrator assigns this level to you, then you are able to see *only* those skillsets (and agents) included in the partitions assigned to you.

Partitions

Partitions determine the data that you can access in Real-Time Reporting, Historical Reporting, and Contact Center Management. If an administrator does not assign a partition to you, then you see all available data in the real-time displays, historical reports, and Contact Center Management.

However, once an administrator assigns a partition to you, it restricts the data that you can see. For example, if the administrator assigns a partition to you containing only skillsets and applications, then you do not see any agent data in Real-Time Reporting, Historical Reporting, or Contact Center Management because there are no agents in your partition. (If the administrator has also assigned a supervisor/reporting agent combination to you, however, then you are allowed to see those agents.)

Additionally, if your administrator has assigned the *Use Skillset Partitions* access level to you (within the CCM Partitions access heading), then in Contact Center Management, you can see only those skillsets included in the partition assigned to you. If your administrator does not assign this access level to you, or if you have no partitions assigned to you, then you see all skillsets in Contact Center Management.

Notes:

- If the administrator assigns a partition to you, then it must contain *all* your agents so you can effectively monitor your agents' activity in the real-time

and historical reports, and work with your agents in Contact Center Management. Therefore, when you or another user creates an agent in Contact Center Management and assigns the agent to you, the administrator must also add the new agent to your partition.

- If your administrator has assigned an access class to you that contains the *Edit Agent Properties Including Partitions* access level, then you can add agents to partitions directly from the Agent or Supervisor/Agent Details window in Contact Center Management; you do not have to request that your administrator do so in Access and Partition Management.

Alternatively, to avoid having to update the list of agents in the partition, your administrator can use the supervisor/reporting agents feature in conjunction with partitions. See below for details.

Note: Once your administrator assigns a supervisor/reporting agent combination to you in Access and Partition Management, when you are working in Real-Time Reporting, you can assign these combinations to private real-time displays and agent map graphical displays to view the corresponding reporting agents. However, you cannot assign any of these combinations to public real-time displays, nor can you include these combinations in custom filters that you assign to displays.

Supervisor/reporting agents feature

In most cases, the supervisor/reporting agents feature only works in conjunction with partitions. That is, for you to see the agents in the supervisor/reporting agent combination assigned to you, your administrator must also assign a partition to you (even if the partition contains no agents). The exception to this rule is in Real-Time Reporting, specifically for the private agent real-time displays and agent map displays. If your administrator has assigned you *only* a supervisor/reporting agent combination in Access and Partition Management (not a partition), then you can apply this supervisor/reporting agent combination to either a private agent real-time display, or an agent map display to view only those reporting agents in the display.

When your administrator assigns a supervisor/agent combination to you, it enables him or her to associate your Web Client user profile with your supervisor profile (which, in turn, is linked to *all* your reporting agents). This association is dynamic, meaning that each time a new agent is assigned to you

(either by you or your administrator), the agent is automatically associated with your Web Client user profile, enabling you to see the new agent in Historical Reporting, Real-Time Reporting, and Contact Center Management. The agents included in a supervisor/reporting agent combination appear in different ways in each of these components.

Notes:

- To restrict you to seeing *only* your reporting agents, your administrator can assign a partition to you containing no agents, and the supervisor/reporting agent combination containing all of your agents.
- Once your administrator assigns a supervisor/reporting agent combination to you in Access and Partition Management, when you are working in Real-Time Reporting, you can assign these combinations to private real-time displays and agent map graphical displays to view the corresponding reporting agents. However, you cannot assign any of these combinations to public real-time displays, nor can you include these combinations in the custom filters that you assign to displays.

Starting Symposium Web Client

When your administrator configures your Web Client user profile, he or she enters a Web Client user name and password for you. When your administrator gives you this user name and password, you can log on to the application server and start to use Symposium Web Client.

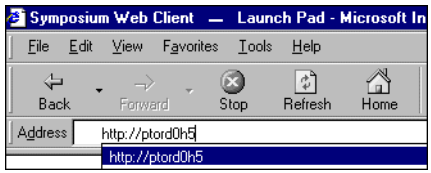
Note: Supervisors who log on to their client PC as either a regular Windows user or a domain user, and whose client PCs run either Windows Server 2003, Windows XP, or Windows 2000 Professional, must have an ID that is part of the Power Users group on the client PC to successfully download and install many of the third-party controls required by Symposium Web Client. (A user with administrator privileges must first install the client SOAP software on the client PCs.) If your client PC runs either of these operating systems and you cannot download a required third-party control, contact your administrator and request that he or she give you an ID that belongs to the Power Users group on the client PC.

To start Symposium Web Client

1 Start Internet Explorer.

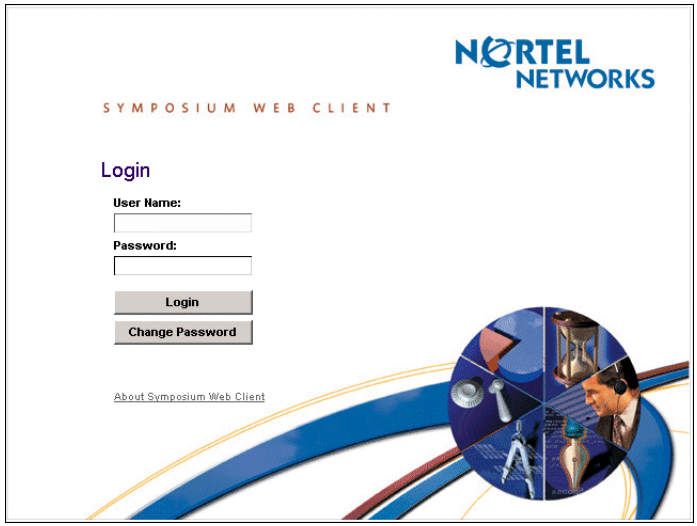
2 Type the IP address or the URL address of the application server. If you do not know this address, contact your administrator.

Note: The default URL address is http://<*Application Server*>.



Tip: You can save the application server's address by adding it to your list of Internet Explorer Favorites.

Result: The application server displays the Symposium Web Client main logon window.



Note: Click **About Symposium Web Client** to view a dialog box containing details of the Symposium Web Client build number and Service Update version.

3 Enter your Web Client user name and password.

Note: If you choose to change your Symposium Web Client password, it must contain only English characters.

4 Click **Login**.

Result: The system checks for the required software. If your administrator has not installed the client version of SOAP 3.0 on the PC, a warning message appears, notifying you that a user with administrator rights must install this software. For details on installing it, see “Installing Simple Object Access Protocol” in the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*. If this software is already installed on the client PC, then the main application window appears. To access any of the components shown, click the component name.

Related documents

The following documents provide additional information about managing and monitoring the operation of your call center.

Note: The *Symposium Call Center Web Client Planning, Installation, and Administration Guide* is accessible from the Help menu in Symposium Web Client.

For information on	refer to
Software installation, configuration, and minimum requirements	*Symposium Call Center Web Client Planning, Installation, and Administration Guide*
Administration	*Symposium Call Center Web Client Planning, Installation, and Administration Guide*
Administration of the Network Control Center (NCC) server	*Symposium Call Center Server Network Control Center Administrator's Guide*
Historical reports and data	*Symposium Call Center Server Historical Reporting and Data Dictionary*
Scripting	*Symposium Call Center Server Scripting Guide*
Meridian 1 Data Extraction Tool	*Symposium Call Center Web Client Data Extraction Tool User's Guide*

Skills you need

Introduction

This section outlines the skills or knowledge that you need to work with Symposium Web Client.

Nortel Networks product knowledge

You require knowledge of, or experience with, the following Nortel Networks product:

- Symposium Call Center Server Release 4.0 or later

PC experience or knowledge

Knowledge of, or experience with, the following PC products is helpful when using Symposium Web Client:

- Microsoft Windows (Server 2003, 2000, or XP)
- Microsoft Internet Explorer Version 6.0 Service Pack 1 or later

Note: As Service Packs for Internet Explorer become available, Nortel Networks tests them for compatibility against the Symposium Web Client software as soon as possible. Nortel Networks recommends that customers upgrade to new service packs as per vendor (Microsoft) recommendations, as critical service packs may include security enhancements.

- Crystal Reports for creating custom historical report templates to import into the Historical Reporting component

Note: Supervisors who log on to their client PC as either a regular Windows user or a domain user, and whose client PCs run either Windows Server 2003, Windows XP, or Windows 2000 Professional, must have an ID that is part of the Power Users group on the client PC to successfully download and install many of the third-party controls required by Symposium Web Client. (A user with administrator privileges must first install the client SOAP software on the client

PCs.) If your client PC runs either of these operating systems and you cannot download a required third-party control, contact your administrator and request that he or she give you an ID that belongs to the Power Users group on the client PC.

Other experience or knowledge

The following types of experience or knowledge may be useful as well:

- knowledge of your call center organizational structure
- understanding of the operational requirements of your call center
- knowledge of your customer needs

Chapter 2

Contact Center Management

In this chapter

Supervisors and agents

Introduction

As a supervisor, you are responsible for managing a group of agents. In Contact Center Management, either a supervisor or a call center administrator creates the agents on Symposium Call Center Server and assigns them to you.

The administrator then performs one or both of the following:

- He or she adds your agents to a partition in Access and Partition Management and assigns the partition to you.
- He or she associates your agents with your Symposium Web Client user profile by clicking the check box beside your name in the Supervisors tab.

Note: If your administrator has not assigned *any* partitions to you, or has not associated your agents with your profile, then you see *all* agent data in Contact Center Management.

Supervisor role

For each of your agents, you

- are notified when the agent presses the Emergency key
- have agent keys configured on your phoneset
- can change agent properties, such as the agent's language, call presentation, and skillset priorities
- can create, edit, and schedule agent to supervisor assignments and agent to skillset assignments in Contact Center Management (provided that the administrator has granted you *Schedule Assignments* access to both types of assignments in Access and Partition Management)

You can view all your agents in your real-time displays, or you can apply filters to the displays to show only a subset of the agents assigned to you. Likewise, you can also create user-defined reports in Historical Reporting, and apply selection criteria to them to show only a subset of the agents assigned to you.

Notes:

- If your administrator does not assign a supervisor/reporting agent combination to you, but only assigns a partition to you, then the partition must contain *all* your agents if you want to see *all* your agents in Real-Time Reporting, Historical Reporting, and Contact Center Management. If you only want to see a portion of your agents, then your administrator only needs to include these agents in your partition.
- In Contact Center Management, supervisor/reporting agent combinations only limit the agents that you can see when combined with a partition. If you do not have a partition assigned to you, but only have a supervisor/reporting agent combination assigned, then you see *all* agents in Contact Center Management in the windows to which you have been granted access.
- If you are only assigned a partition and a new agent is created in Contact Center Management and assigned to you, then the administrator must also add the agent to at least one of the partitions assigned to you. If the administrator does not add the new agent to your partition, then you will not see the agent in Real-Time Reporting, Historical Reporting, or Contact Center Management.
- If, on the other hand, your administrator assigns a supervisor/reporting agent combination to you that contains all your agents (in addition to assigning you a partition), then he or she does not have to update the combination as new agents are assigned to you; the supervisor/reporting agent combination is automatically updated to reflect *all* your reporting agents.

Supervisors and associated supervisors

You have the primary responsibility for the agents assigned directly to you. In the Symposium Call Center Server client, when the *primary* supervisor is unavailable, an *associated* supervisor provides backup by monitoring the agents in the real-time displays and historical reports.

In Symposium Web Client, the concept of an associated supervisor differs slightly from the Symposium Call Center Server client. Instead of designating associated supervisors, your administrator can use two features—partitions or the supervisor/reporting agents feature—to share a supervisor's agents with other supervisors who can monitor their agents in their absence.

Note: While partitions alone can restrict the agents that you can see, supervisor/reporting agent combinations cannot accomplish this on their own: your administrator must also assign a partition to you (even if it contains no agents) for the supervisor/reporting agent combination to restrict you to viewing only the agents assigned to you. If your administrator *only* assigns a supervisor/reporting agent combination to you, then you see *all* agents in Contact Center Management.

While partitions enable your administrator to assign *specific* agents to you on a per server basis, the supervisor/reporting agents feature enables your administrator to assign *all* of a supervisor's reporting agents to you on a per server basis. Partitions, therefore, are useful for assigning associated agents (*some* of a supervisor's agents to another supervisor), while the supervisor/reporting agents feature is useful for assigning *all* of a supervisor's reporting agents. Your administrator can use only partitions, or a combination of both features, to control the agent data that you can see.

Example

The company Best Air has two sales departments, Europe and Canada. The two corresponding supervisors for each department are Andrew Engel and Liz Matthews. The administrator creates two partitions for the call center, one for each supervisor. Each partition contains all the *associated* agents for each supervisor, plus the required skillsets, CDNs, DNIS, applications, and report groups. The administrator also assigns a supervisor/reporting agent combination to each supervisor, enabling them to automatically view all their own *reporting* agents.

In this example, supervisor Andrew Engel has 5 agents reporting directly to him. These agents are assigned to him in Contact Center Management, and are assigned to his Web Client user profile through the supervisor/reporting agents feature in Access and Partition Management. The partition assigned to him includes 7 of the 10 agents who report directly to Liz Matthews, making Andrew the associated supervisor for these 7 agents. When Liz is unavailable, Andrew can monitor these 7 agents in the real-time displays, historical reports, and Contact Center Management, in addition to his own reporting agents.

Result in Contact Center Management

In the windows to which Andrew has been given access, he sees all the agents included in the partition assigned to him (his associated agents), and the agents included in the supervisor/reporting agent combination assigned to him (his reporting agents). For more information on partitions, supervisor/reporting agent combinations and Contact Center Management, see "Partitions and supervisor/reporting agent combinations in Contact Center Management" in the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*.

Note: To make Andrew Engel the associated supervisor for *all* of Liz's reporting agents, instead of manually adding all the agents to a partition and assigning the partition to Andrew, use the supervisor/reporting agents feature to link Liz Matthews' profile with Andrew's Web Client user profile.

Result in Real-Time Reporting

In Real-Time Reporting, Andrew creates one filter:

- filter A containing Liz's 7 agents

When Andrew configures his private agent real-time displays, he can

- view all his *associated* agents by assigning filter A to the display
- view all his *reporting* agents by assigning the appropriate supervisor/reporting agent combination to the display
- view both his associated and reporting agents in one display by assigning filter A and the supervisor/reporting agent combination to the display

Result in Historical Reporting

In Historical Reporting, Andrew can use the selection criteria to specify the agents he wants to include in reports.

Web Client users

The Symposium Web Client equivalent of the Desktop User in Symposium Call Center Server is the Web Client user. This type of user can access the application server and use Symposium Web Client.

In Contact Center Management, you can give supervisors and supervisor/agents a Web Client user ID and password, enabling them to access Symposium Web Client. However, these Web Client users cannot work with any components until a user with administrator privileges finishes configuring their user profiles in the Access and Partition Management component.

Administrators must grant Web Client users basic access rights to the appropriate Symposium Web Client components before they can use them. Administrators also assign supervisor/reporting agent combinations, partitions, and access classes to Web Client users in the Access and Partition Management component. Therefore, when you assign a Web Client user ID and password to a user in Contact Center Management, notify your administrator.

Note: Users with the appropriate access class can also assign agents and supervisor/agents to partitions through Contact Center Management. For more information, see the online Help included with the application.

Agent types in Contact Center Management

There are two types of agents in Contact Center Management:

- **Agents** A user with agent capability is assigned skillsets and answers calls in the call center. All agents must be assigned to a supervisor. The only component of Symposium Web Client that agents can use is the stand-alone component, Agent Desktop Displays. Agents are not assigned a Web Client user ID and, therefore, cannot log on to the application server and use Symposium Web Client.
- **Supervisor/agents** A user with supervisor/agent capability is assigned skillsets, answers calls in the call center, and can perform some of the duties of a regular supervisor, such as monitor real-time displays in Symposium Web Client and answer agent queries. All supervisor/agents must be assigned to a supervisor. In turn, sometimes supervisor/agents can have agents assigned to them.

  If this type of user requires access to Symposium Web Client (for example, to view real-time displays), he or she is assigned a Web Client user ID in Contact Center Management. Then, the user profile is automatically copied to the Access and Partition Management component of Symposium Web Client.

  Before the supervisor/agent can use any of the Symposium Web Client components, the administrator must also configure the supervisor/agent's profile in Access and Partition Management by granting the user basic access rights to the appropriate Symposium Web Client components.

Agent properties

In Contact Center Management, when you create an agent or change an existing agent, you can specify the following properties:

- general properties—including name, language, department, title, and comments
- user type—either agent or supervisor/agent
- phoneset properties—the agent's phoneset login ID
- call presentation properties—the agent's call presentation class
- threshold properties—the agent's threshold class
- skillset properties—the skillsets to which an agent is assigned, and the agent's priority for those skillsets
- supervisor properties—the agent's supervisor
- partitions—the partitions to which the agent belongs (only administrators can assign agents to partitions from the Contact Center Management windows)

In addition to the above properties, when you create a supervisor/agent, you can specify the following properties:

- telephony/port address (This is the number of the phoneset at which the supervisor logs on. This is the phoneset on which the switch maps the agent keys for agents reporting to this supervisor.)
- Web Client user ID
- Web Client password

Section A: Skillsets

In this section

Overview

Introduction

As a supervisor, you must ensure that skillsets are serviced adequately by the available agents. To do so, you must ensure that each skillset is staffed by enough qualified agents to handle the call load for that skillset.

What is a skillset?

A skillset is a group of abilities necessary to answer a specific type of call. Skillsets are the basic building blocks of skill-based routing. They are used to match callers with the agents who can best meet their needs.

Examples of skillsets

The company Best Air has several different skillsets:

- **Bookings:** Agents who can accept and change bookings, and provide schedule and rate information.
- **Shipping:** Agents who can arrange for shipment of goods. Additional skillsets include agents who specialize in shipment of perishable food products and hazardous goods, as well as international shipments.
- **Cargo Tracing:** Agents who specialize in the tracing of shipments and personal luggage.
- **Best Air Travel Club:** Agents who can provide information about Best Air Travel Club benefits and air miles.
- **Vacations:** Agents who can book vacation packages. Additional skillsets specialize in American, European, Asian, and Pacific vacations.

James Jones is a booking agent with Best Air. He is a member of the Bookings skillset. Through training courses, James has become familiar with the company's vacation package offerings. After completing the courses, he was also assigned to the Vacations skillset. Through subsequent courses, travel, and reading, James has developed additional expertise in European travel issues. He is now also a member of the European skillset.

Skill-based routing

Skill-based routing uses skillsets to match callers with the agents who can best meet their needs.

Example

Sandra Smith wants to book a vacation to Britain. She has called several airlines to obtain information for the trip, including

- schedules and fares information
- a British Rail pass
- a list of bed-and-breakfasts in the cities she is planning to visit
- information about tour packages

When she calls Best Air, Sandra's call is routed to the European skillset and presented to James Jones. James is able to give her information about the British Rail pass, along with a list of bed-and-breakfasts, and a description of the available tour packages.

When skillsets go out of service

Skillsets go out of service under the following conditions:

- automatically, when all agents have logged off
- manually, when your administrator changes the skillset mode in the Skillsets window of the Configuration component

Two out-of-service modes are available: transition mode and night service mode.

Transition mode

Transition mode is a skillset state in which Symposium Call Center Server presents calls already queued to a skillset, but gives all new calls out-of-service treatment. Your administrator may put a skillset into transition mode if a service interruption occurs during the business day, and you want to answer all calls currently waiting in the queue before putting the skillset out of service. The administrator must put skillsets into transition mode manually in the Skillsets window of the Configuration component.

Night service mode

Night service mode is a skillset state in which queued calls and any new calls arriving for a skillset are given out-of-service treatment. The system can put skillsets into night service mode automatically—when all agents have logged off—or the administrator can put them into night service mode manually in the Skillsets window of the Configuration component.

In scripts, your administrator defines how calls are handled when a skillset is in night service mode.

Calls in queue

Introduction

Symposium Call Center Server must make the following decisions when presenting calls:

- If multiple agents are available, to which agent will it present the call?
- If multiple calls are waiting, which call will it present first?

Choosing an agent

If two agents are available to answer an incoming call, the server in Symposium Call Center Server presents the call to the agent with the highest priority for the skillset to which the call is queued. Symposium Call Center Server bases skillset priority on the agent's skill level for a skillset. It assigns a higher priority for a skillset to an agent with a higher skill level, and it assigns a lower priority to an agent with a lower skill level. (Priority can range from 1 to 48, with 1 being the highest priority for the skillset.)

If more than one agent has the same priority, the server presents the call to the agent with the greatest idle time. Your administrator can configure Symposium Call Center Server to base idle time on one of

- total idle time since logging on
- total idle time since the last status change
- total idle time since the end of the last skillset or ACD call

Choosing a call

If two calls are waiting in a skillset queue when an agent for that skillset becomes available, Symposium Call Center Server uses the following criteria (in the order shown) to determine which call to present first:

- **call priority** This is a numerical value assigned in a script that defines the relative importance of a call. All priority 1 calls will always be answered before any calls of priority 2 or greater.

- **call source preference** (networking environment only**)** The server determines the presentation order of calls within the same priority by first checking the call source preference, and then checking the call age preference. The administrator determines which calls—local or network—are given preference, or can choose not to prioritize calls based on source. If the administrator sets the call source preference to *none*, the server does not consider it when presenting calls and, instead, passes directly to the call age preference.
- **call age preference** The amount of time a call has been waiting in the system before being presented to an agent. Symposium Call Center Server uses call age preference to arrange the order of calls with the same priority and the same call source preference. The administrator can configure Symposium Call Center Server to base call age on either
  - when the call was received by the server (that is, passed to the server from the switch or from an external IVR)
  - when the call was added to the skillset queue (for example, if a call was queued to one skillset, presented to an agent, and subsequently queued to another skillset)

Example

The following example outlines how Symposium Call Center Server uses a combination of call priority, call source preference, and call age preference to present calls in the queue to agents.

In this example, the call source preference is *network*. There are three calls waiting in the queue:

- a priority 2 local call that has been in the queue for 1 minute
- a priority 3 local call that has been in the queue for 3 minutes
- a priority 3 network call that has been in the queue for 2 minutes

Since call priority is the first consideration when routing calls, Symposium Call Center Server presents the priority 2 call first, even though it has been in the queue for the least amount of time.

Then, since call source preference is the second consideration when routing calls, the server presents the *network* priority 3 call next, even though it has been in the queue for less time than the *local* priority 3 call. Finally, the server presents the local priority 3 call.

Note: If the administrator does not set the call source preference, the only two criteria for routing calls are call priority and call age preference. Therefore, in this example, the priority 2 call is still presented first, followed by the priority 3 local call that has been in the queue for 3 minutes, and lastly the priority 3 network call that has been waiting for 2 minutes.

Queuing to a default skillset

Your administrator can define a default skillset. Any calls that are not queued by the end of script execution are automatically queued to this skillset.

In the Meridian 1, Succession Communication Server for Enterprise 1000, and Meridian 1 Internet Enabled (M1/Succession 1000/M1 IE) switch environment, your administrator can create a separate default skillset for each agent.

In the Digital Multiplex Switch/Meridian Stored Logic 100 switch (DMS/MSL-100) environment, only one default skillset is available for all agents. For example, Best Air has defined Bookings as the default skillset. Calls that have not been queued by the end of the script execution are presented to agents assigned to the Bookings skillset.

Other skillset options

Introduction

Your administrator can create activity codes and threshold classes to help track your agents' skillset activity more effectively in reports and real-time displays.

Activity codes

Agents can assign activity (line of business) codes to the calls they answer. The system uses activity codes to track the amount of time that is spent on the various types of incoming calls. To generate reports with meaningful activity code names, your administrator must define these activity codes at the server.

Notes:

- On the DMS/MSL-100 switch, agents can enter a maximum of three activity codes.
- To use this feature on the DMS/MSL-100 switch, your administrator must also
  - enable the LOB feature on the switch
  - configure Line of Business codes in the ACDGRP table on the switch

Default activity code

On the M1/Succession 1000/M1 IE switches, your administrator can define two default activity codes:

- **system default activity code** If an agent does not enter an activity code during the entire call, the system uses the system default activity code.
- **skillset default activity code** If an agent presses the activity code key twice during a call without entering an activity code, the system uses the skillset default activity code.

Threshold classes

A threshold class is a set of options that specifies how statistics are treated in reports and real-time displays. For example, your administrator can set a short call threshold for skillsets. The short call threshold defines the length of a short call for pegging purposes.

Global skillset properties

Your administrator defines global properties for your system in the Global Settings window of the Configuration component. The global skillset properties that he or she defines apply to all skillsets defined on your Symposium Call Center Server. These properties include

- the system default skillset
- (for the DMS/MSL-100 switch only) the Recorded Announcement (RAN) route for the default skillset
- the agent idle time preference
- (for the DMS/MSL-100 switch only) the delimiter used between fields in caller-entered data

Note: (Networking option only) If the default skillset is a network skillset, calls that are not queued by the end of script execution are queued to this skillset on the local server.

Section B: Working in Contact Center Management

In this section

Overview

Contact Center Management can be separated into the following four main data views, each accessible from the View/Edit menu:

- Supervisors (this is the default view that appears when you first open Contact Center Management)
- Agents
- Skillsets
- Assignments

To switch from one type of data, or view, to the next, click the desired option from the View/Edit menu.

When you click any of these options, the system loads the corresponding type of data in the system tree. Before you can work with each type of data, you must first click a server name in the tree to log on to the server and view its agents, supervisors, and skillsets. If you work in a networked environment (and have been granted access to multiple servers in the network), the system tree contains multiple servers with each server representing a call center in the network.

Note: When you click **Refresh,** the system collapses the tree, closes the window in which you are currently working, and reloads the supervisor view. Once reloaded, you must click to log on to a server again.

For more information on each of these data views, see the corresponding section in this chapter.

Notes:

- To create new users, click the desired option from the Add menu. You can choose from Agent, Supervisor, or Supervisor/Agent. When you click one of these options, the corresponding new user details window appears, where

you can type the user's properties. For more information on creating users, see the online Help.

- To create new agents, in addition to the above option, you can also right-click a supervisor in the system tree, and then select **Add Agent** from the resulting pop-up menu.
- The servers that you can see and the windows that you can view in Contact Center Management vary according to the access class that your administrator has assigned to you. If you cannot access a server, window, or a type of data that you need to work with, contact your administrator and request that he or she update the access class assigned to you. For a list of the access class levels required to work in each of the Contact Center Management windows, see "Access classes and Contact Center Management" on page 58.

Access classes and Contact Center Management

When your administrator configures your profile in Access and Partition Management, he or she assigns you basic rights to work in the Symposium Web Client components that you need to access—typically, Contact Center Management, Historical Reporting, and Real-Time Reporting—and then assigns an access class to you that controls the actions that you can perform in Contact Center Management.

Note: Access classes are not applicable to Historical and Real-Time Reporting; users with basic access to these components can perform all functions.

The table on page 59 lists the access levels required to perform typical supervisor functions in each of the windows in Contact Center Management. If you need to perform actions that are usually associated with administrators (for example, adding and editing supervisors, and deleting users), then consult the online Help for descriptions of the required access levels.

The access levels shown can be combined to increase the number of actions that you can perform. For example, if your administrator assigns to you the *Edit Agent Properties* access level under the CCM access heading, the *Ad Hoc Assignments* access level under the Skillset Assignment access heading, and the *Schedule Assignments* access level under the Agent to Supervisor Assignment access heading, then you can do the following:

- View and edit agent properties in the Agent Details window.
- Perform ad hoc agent to skillset assignments.
- Assign agents to supervisors on an ad hoc basis, and create and edit scheduled agent to supervisor assignments.

For complete details on all access levels, see the online Help included with the application, or the *Symposium Call Center Web Client Planning, Installation, and Administration Guide.*

Note: Your administrator controls the agents and skillsets that you can see in the Contact Center Management windows by assigning partitions and supervisor/ reporting agent combinations to you. Therefore, you can only perform the following functions using the data to which you have been granted access:

This access level	enables you to perform this task
Edit Agent Properties under the CCM access heading	View and edit agent properties in the Agent Details window.
Edit Agent Properties Including Partitions under the CCM access heading	View and edit agent properties, including assigning agents to partitions, in the Agent Details window. **Note:** Users can assign agents only to those partitions to which they have been given access.
Ad Hoc Assignments under the Skillset Assignment access heading	Perform ad hoc agent to skillset assignments in the Agent Details, Agent, and Skillset windows.
Ad Hoc Assignments under the Agent to Supervisor Assignment access heading	Perform ad hoc agent to supervisor assignments in the Supervisor window.
Schedule Assignments under the Skillset Assignment access heading	Perform scheduled agent to skillset assignments in the Agent to Skillset Assignment window, and ad hoc agent to skillset assignments in the Agent Details, Agent, and Skillset windows.
Schedule Assignments under the Agent to Supervisor Assignment access heading	Perform scheduled agent to supervisor assignments in the Agent to Supervisor Assignment window, and ad hoc agent to supervisor assignments in the Supervisor window.

This access level	enables you to perform this task
Use Agent Partitions in CCM under the CCM Partitions access level	This is the default level for this access heading and enables you to work with all skillsets on all servers to which you have access, in addition to the agents included in the partitions and in any supervisor/reporting agent combinations assigned to you.
Use Agent & Skillset Partitions in CCM under the CCM Partitions access level	Work with only those skillsets and agents included in the partitions assigned to you, in addition to the agents included in the partitions and in any supervisor/reporting agent combinations assigned to you.

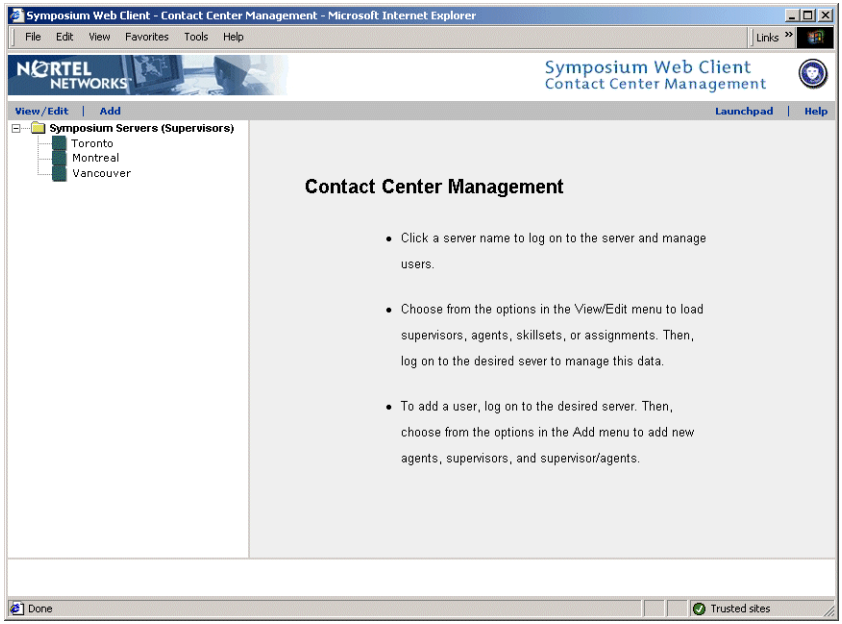
Working in supervisor view

Introduction

When you open Contact Center Management from the Symposium Web Client launchpad, it opens in supervisor view. This view enables you to quickly see the supervisors who are configured on each server on the system tree and list the agents assigned to each supervisor. You can use this view to immediately assign agents to supervisors (ad hoc assignments).

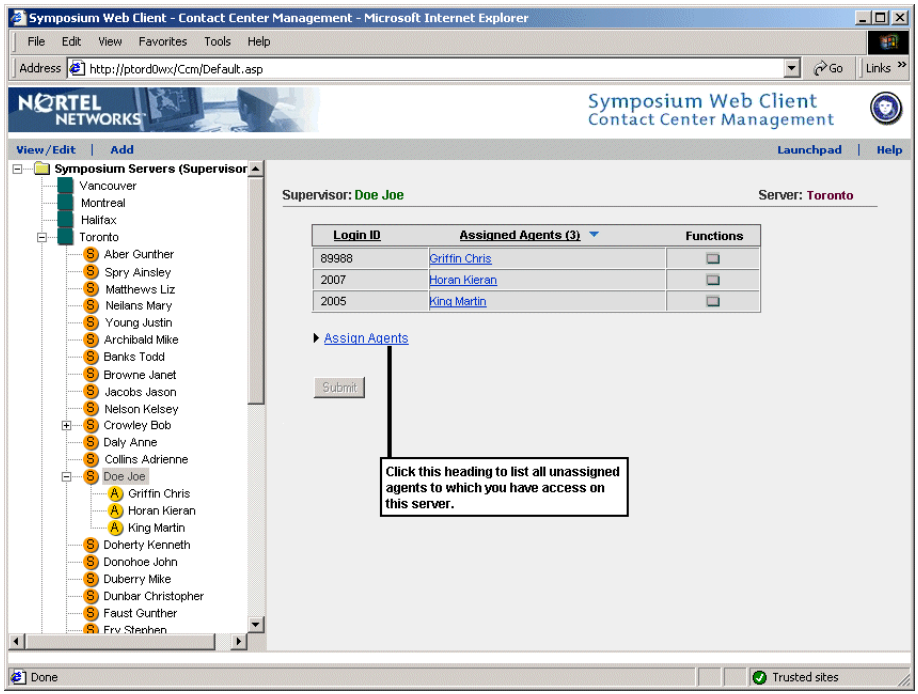
Notes:

- To create saved and scheduled assignments, you must use the assignments view. For more information, see “Working in assignments view” on page 72.
- To add new supervisors, you must use the Add menu.

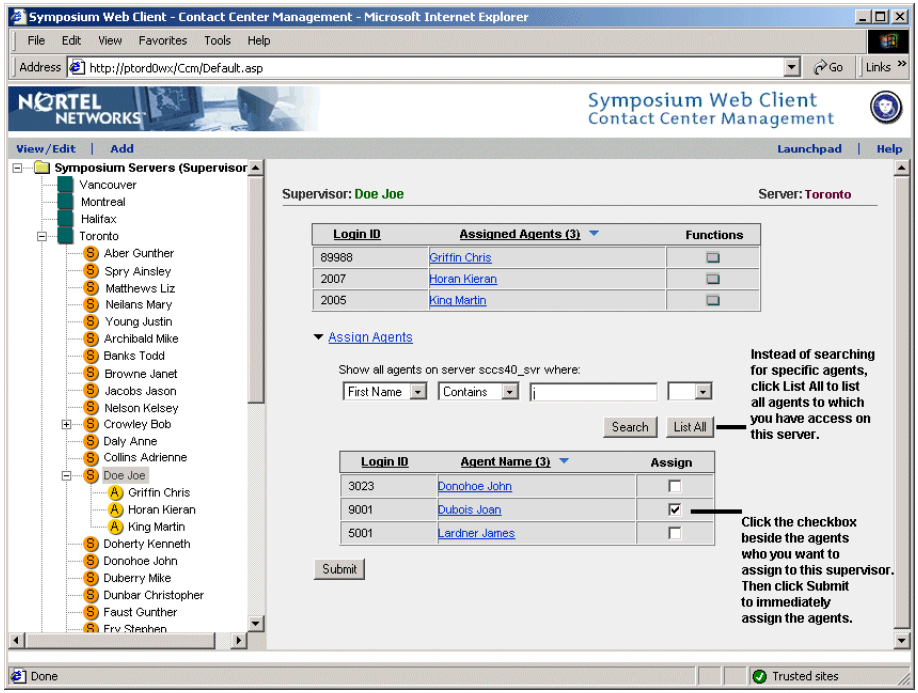


Ad hoc agent to supervisor assignments

To work with agents and supervisors in supervisor view, you must first log on to the appropriate server in the system tree. The server expands to reveal all the supervisors configured on it. Click a supervisor in the tree to open the Supervisor window and see the supervisor's reporting agents and their corresponding login IDs.



To quickly assign new agents to a supervisor, click **Assign Agents**. The agent search feature appears, enabling you to search for *specific* agents by up to five criteria (first name, last name, login ID, department, or comment), or to list *all* agents configured on the server (only those agents included in the partitions and supervisor/reporting agent combinations assigned to you). When you click **Search** or **List All**, the agents appear in a new table.



When you have found the agents you want to assign to the supervisor, click the **Assign** check box beside their names, and then click **Submit**. The system immediately assigns the agents to the supervisor.

Note: Each agent can be assigned to only one supervisor at a time. Therefore, when you assign an agent to a supervisor, you unassign the agent from his or her current supervisor.

Tip: You can also assign agents to the supervisor, one agent at a time, using the drag and drop feature. On the system tree in supervisor view, locate the agent who you want to assign to the supervisor. Left-click the agent icon and, while still holding down the left mouse button, drag the icon over the desired supervisor icon. Release the mouse button to immediately assign the agent to the supervisor.

Working in agent view

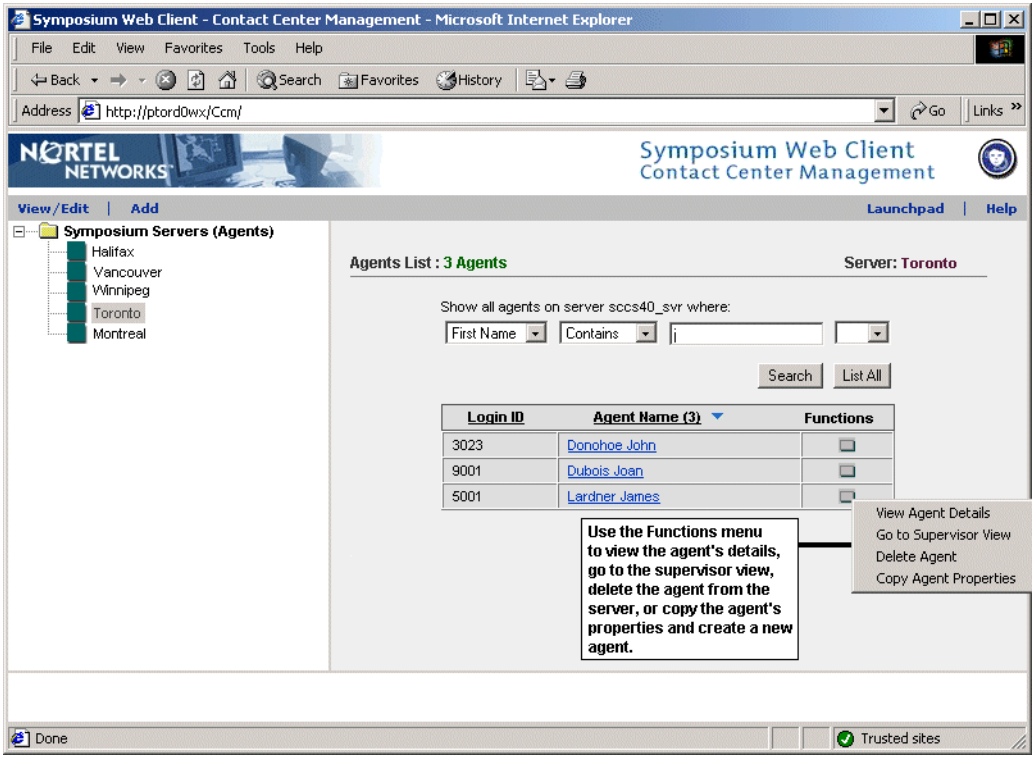
Introduction

Note: In the following section, the term “agent” also includes users who are supervisor/agents, as the agent view enables you to work with both types of users.

The agent view enables you to search for particular agents or list all agents on a server. Once you have located the desired agent, assuming you have been granted the appropriate access class, you can

- view and edit the agent’s properties, including the skillsets and partitions to which the agent is assigned
- delete the agent from the server
- quickly create a new agent by copying the current agent’s properties

To open the agent view, click View/Edit → Agents. Then click the desired server in the system tree to log on to the server and work with the agents configured on it (only those agents included in the partitions and supervisor/reporting agent combinations assigned to you). When you click a server in the system tree, the Agents List window appears. In this window, you can use the agent search boxes to locate specific agents, or click **List All** to list all agents on the selected server.

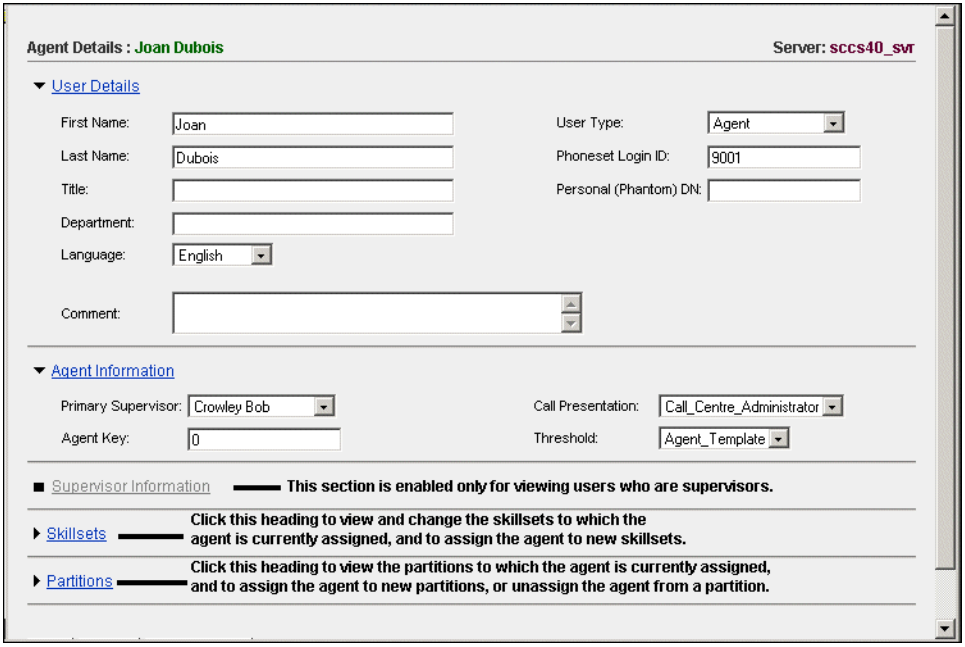


Viewing or editing the agent details

In the Agents List window, from the table of agents who you have located through your search, there are two ways in which you can view or edit an agent's details:

- Click the desired agent's name.
- Click **Functions** beside the desired agent, and then select **View Agent Details** from the resulting pop-up menu.

When you click either of these options, the Agent Details window appears, enabling you to view all of the agent's properties, such as name, login ID, supervisor information, and, if you have the appropriate access class, the skillsets and partitions to which the agent is assigned.



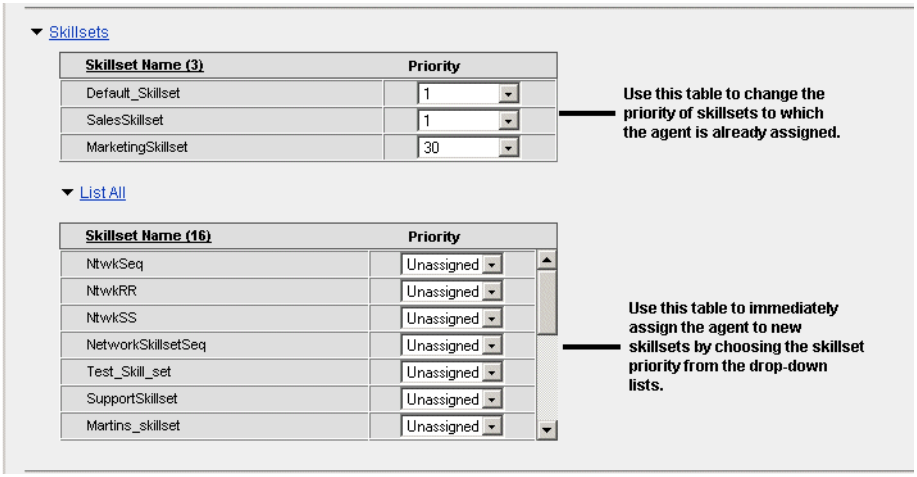
Use the User Details and Agent Information sections of this window to view and change information about the agent, such as the name, login ID, user type, and primary supervisor.

In addition, when you create supervisors and supervisor/agents, the Supervisor Information section is enabled and allows you to assign these users a Web Client user ID and password.

This information is required if the user is going to log on to the application server and use Symposium Web Client. When you are finished adding the user's details, you must click **Submit** to save your changes.

Viewing or editing ad hoc agent to skillset assignments

Click the **Skillsets** heading in the Agent Details window to view the skillsets to which the agent is assigned and change the skillset priority. (You must have at least the *View Assignments* access level under the Skillset Assignments access heading to open the Skillsets section of the Agent Details window, and the *Ad Hoc Assignments* access level to change the skillset priority or assign the agent to new skillsets.) Click **List All** to list all configured skillsets on the server to which you have access, and assign the agent to new skillsets.



Viewing or editing partition assignments

Click the **Partitions** heading in the Agent Details window to view the partitions to which the agent is assigned and assign the agent to new partitions. (You must have at least the *View Agent Properties* or *Edit Agent Properties* access level to expand this heading and view the partitions to which the agent is assigned, and at least the *Edit Agent Properties Including Partitions* access level or higher to assign the agent to new partitions.)

Click the check box beside the partition name to assign the agent to the partition. When you click **Submit**, the agent is automatically included in the partition you indicated (and can, therefore, be viewed by the supervisors to whom this partition is assigned).

Deselect the check box beside the partition name to unassign the agent from the partition.

Note: Before you unassign an agent from a partition, ensure that the agent's supervisor can still see the agent in Contact Center Management, Historical and Real-Time Reporting, either because the agent is included in another partition assigned to the supervisor, or the supervisor is assigned a supervisor/reporting agent combination (which automatically includes the agent).

Deleting agents in agent view

Note: Only users with the *Add/Edit/Delete Agents* access level or higher are allowed to delete agents.

On the Functions menu in agent view, you can click **Delete Agent** to delete the agent from the server, or you can right-click the agent's name in the system tree, and select **Delete Agent** from the resulting pop-up menu.

Copying an agent's properties

You can also use the Functions menu in the Agents List window to quickly create a new agent by copying the properties of an existing agent.

Note: You must have the *Add/Edit/Delete Agents* access level or higher to create agents in Contact Center Management.

When you click **Copy Agent Properties** on the Functions menu, the system copies the following properties from the existing agent into the New Agent Details window:

- skillset assignment
- department
- user type
- language
- comment
- supervisor
- call presentation
- threshold
- agent key

To create the new agent, you must type in the new agent's name and phoneset login ID. You may also change any of the copied properties, and then press **Submit** to save your changes. The system saves the agent under the supervisor that you specified, and the agent's icon appears in the system tree.

Working in skillset view

Introduction

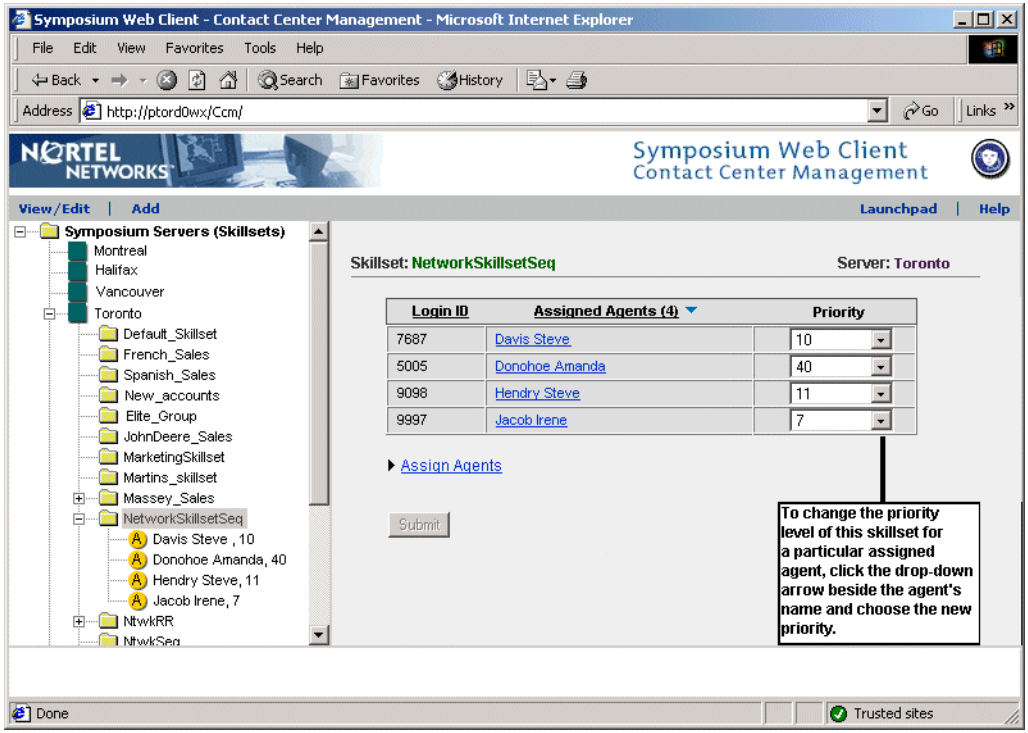
The skillset view enables you to create new ad hoc agent to skillset assignments and change the priority of skillsets already assigned to agents. Click View/Edit → Skillsets to load skillset data in the system tree. Then click the desired server in the system tree to log on to the server and work with the skillsets and agents configured on it.

When you click a skillset in the system tree, the Skillset window appears, listing the agents who are currently assigned and their priority for this skillset.

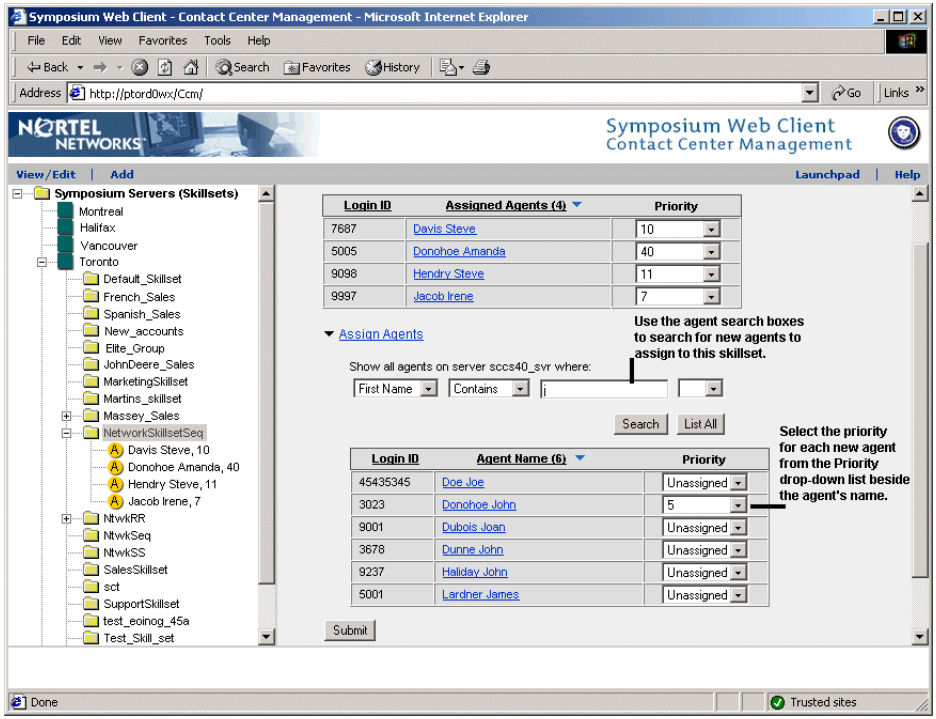
Note: To log on to a server and view data in the skillset view, your administrator must have assigned to you the *View Assignments* access level or higher under the Skillset Assignments access heading. If you are not assigned this access level or higher, then you cannot log on to the servers in skillset view and work with skillset assignments.

Ad hoc agent to skillset assignments

In the Skillset window, you can immediately assign an agent to a new skillset or change the priority of an assigned skillset. To change the priority of an agent already assigned to the skillset, from the **Priority** drop-down list, choose the new priority. Then click **Submit** to save your changes.



To immediately assign a *new* agent to the skillset, click the **Assign Agents** heading. Just as in supervisor view, when you click this heading, the agent search feature appears, enabling you to search for *specific* agents by up to five criteria (first name, last name, login ID, department, or comment), or to list *all* agents configured on the server (only those agents included in the partitions and supervisor/reporting agent combinations assigned to you). When you click **Search** or **List All**, the agents appear in a new table.



From the list of unassigned agents, choose the skillset priority for each agent. Then click **Submit** to save your changes. The system immediately assigns the agents to the skillset with the priority you chose.

Note: To create saved or scheduled assignments, you must use the assignments view. For more information, see “Working in assignments view” on page 72.

Working in assignments view

Introduction

The assignments view enables you to view and edit saved and scheduled agent to skillset and agent to supervisor assignments, and create new saved and scheduled assignments. You can also use this view to run saved and scheduled assignments immediately by using the Run Now feature.

Click View/Edit → Assignments to load the assignment data in the system tree. Then click the desired server in the system tree to log on to the server and work with the assignments configured on it.

Notes:

- To log on to servers in assignments view and work with assignment data, you must have the *Schedule Assignments* access level under either the Agent to Supervisor Assignments or the Skillset Assignments access headings (or both).
- To create ad hoc (unscheduled) agent to skillset assignments, use the skillset view. To create ad hoc agent to supervisor assignments, use the supervisor view.

ATTENTION

Symposium Web Client only recognizes assignments that you schedule in Contact Center Management; likewise, the Symposium Call Center Server client only recognizes assignments that you schedule through its scheduling component. Therefore, when scheduling assignments, you must use either the Contact Center Management portion of Symposium Web Client *or* the Symposium Call Center Server client exclusively. You cannot use a combination of both client components to schedule assignments.

Assignment types

There are two types of assignments that you can create in Contact Center Management:

- **Agent to supervisor assignments** You can create agent to supervisor assignments to automatically change supervisor assignments for multiple agents. You can use agent to supervisor assignments to reassign agents when supervisors go on break or vacation.
- **Agent to skillset assignments** You can create agent to skillset assignments to temporarily assign agents to different skillsets for shifts when fewer agents are available, to cover other agents' breaks, or when agents are sick, on vacation, or on a course.

An agent to skillset assignment makes multiple agents active or inactive for multiple skillsets. When an assignment is run, it changes the skillset priority of each agent who has been added to the assignment. It can make an agent inactive for a skillset by changing the agent's priority to Standby, or it can make an agent active for a skillset by changing the agent's priority to a value from 1 to 48 (with 1 being the highest priority for the skillset).

In assignments view, you can save and schedule the assignments to take effect at a later date, and you can create reset assignments to revert the call center to the original configuration that existed before scheduled assignments are run. You can run saved and scheduled assignments immediately by using the Run Now feature. You create ad hoc assignments (those that are effective immediately) in the skillset or supervisor views. For more information, see "Ad hoc agent to supervisor assignments" on page 62, or "Ad hoc agent to skillset assignments" on page 69.

Reset assignments

When you create a scheduled agent to supervisor assignment or an agent to skillset assignment in the assignments view, you can choose to make a reset assignment. A reset assignment is a record of the original data that existed at the time you created the assignment. For example, it contains a record of the original list of agents assigned to a supervisor before you create an agent to supervisor assignment.

A reset assignment enables you to change and run the assignment as many times as you require, and then run the reset assignment to return conditions to their original state. This feature is particularly useful when you create an assignment to cover agent or supervisor breaks, and then want to return conditions to their normal state when the agent or supervisor returns to work.

Example

Supervisor Pat Jones takes a lunch break every day from 12:00 to 1:00 p.m. You create an agent to supervisor assignment that reassigns all of Pat's agents to Mike Smith, and you schedule it to take effect at 12:00 p.m. every day. When you save the assignment, you create a reset assignment, which contains a record of all the agents originally assigned to Pat. You schedule the reset assignment to take effect every day at 1:00 p.m., thereby reassigning all Pat's agents back to Pat when she returns from her lunch break.

Notes:

- When you delete the assignment, the system deletes the corresponding reset assignment.
- When you create a reset assignment, the system saves it with the same name as the original assignment, but adds __ (two underscores) at the end of the name. For example, if the assignment is called *Pat_lunch*, the system saves the reset assignment as *Pat_lunch__*.
- You can modify a reset assignment just as you modify any other assignment.

Agent to supervisor assignment scenarios

The following scenarios provide some examples of when you create agent to supervisor assignments:

Example 1: Supervisor is sick

Pat Wilson, one of Best Air's supervisors, calls in sick for the day. The call center manager sets up an agent to supervisor assignment that assigns half of Pat's agents to Chris Konings, and the other half to Cindy Wong. The manager applies the assignment immediately, and all agents are assigned to their temporary supervisors for the day. When the manager creates the assignment, she also creates a reset assignment, and schedules it for next day to reassign all agents back to Pat.

Example 2: Supervisor is on vacation

Pat has booked vacation from the 17th to the 28th of August. Best Air's call center manager has set up an agent to supervisor assignment that reassigns Pat's agents for that period. The manager schedules the assignment to begin automatically on August 17th. When the manager creates the assignment, she also creates a reset assignment, which takes effect August 28th at 5:00 p.m., reassigning the agents back to Pat.

Example 3: Supervisor is on regularly scheduled training

At Best Air, all supervisors are required to participate in regular upgrading. Every four weeks, the supervisor must spend half a day in training. Training sessions are staggered to ensure adequate supervision of the call center. Pat's training occurs every third Thursday of the month. The call center manager has set up an agent to supervisor assignment that automatically reassigns Pat's agents for that time.

Agent to skillset assignment scenarios

The following scenarios provide some examples of when you create agent to skillset assignments:

Example 1: Agents are sick

Mark Schultz, an agent in Best Air's Cargo Tracing skillset, is sick and absent from work today. This has left the Cargo Tracing skillset understaffed, particularly for the period from 10:00 a.m. to 4:00 p.m., the skillset's busiest time. The call center manager temporarily assigns Rose Stefanopolis (an agent who has worked in this skillset before) to the Cargo Tracing skillset. The manager applies the agent to skillset assignment immediately, and Rose is automatically reassigned. The manager reassigns Rose to her normal skillset when Mark returns to work the following day.

Example 2: Coffee and lunch breaks

As agents go on break, their skillsets become understaffed. To improve skillset coverage for coffee and lunch breaks, Best Air's call center manager reassigns the skillsets during these periods.

Example 3: Shifts

During the early morning and evening periods, few agents are available. As a result, many skillsets are understaffed. Others, such as the Cargo Tracing skillset, do not go into service until 9:00 a.m., and go out of service at 5:00 p.m. Best Air's call center manager has set up an agent to skillset assignment to automatically assign members of the Cargo Tracing skillset to Bookings, the busiest skillset, during early morning and evening periods.

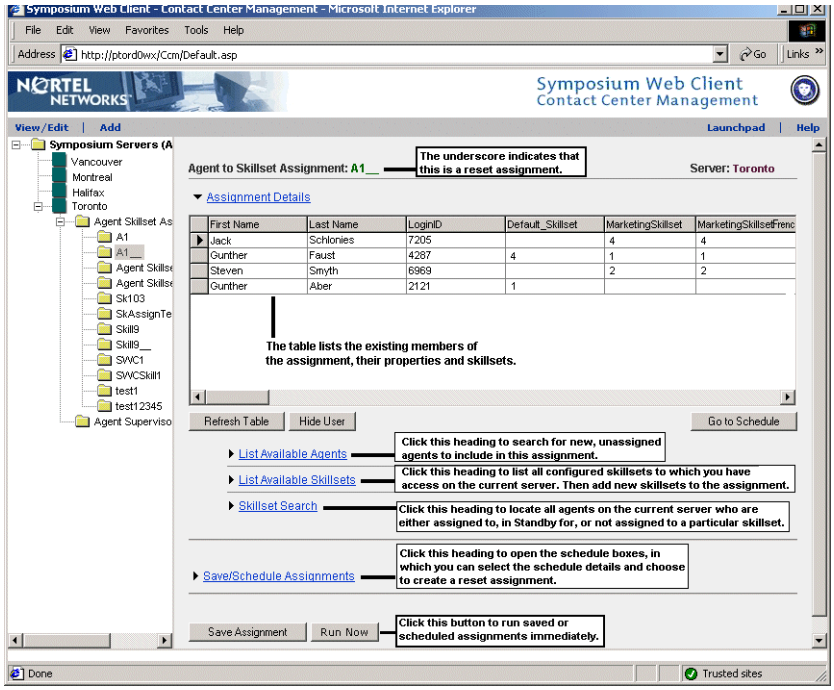
Working with scheduled assignments

In assignments view, you can either

- work with *existing* scheduled assignments by clicking the assignment name in the system tree
- add *new* agent to skillset or agent to supervisor assignments by right-clicking the Agent Skillset Assignments or Agent Supervisor Assignments folder, and then choosing **Add Assignment** from the resulting pop-up menu

When you log on to a server in the system tree, it expands to reveal the Agent Skillset Assignments and Agent Supervisor Assignments folders. Click the appropriate folder to view the list of assignments. Then click the assignment name to open the assignment window and view the assignment details in a table. Based on the type of assignment that you click in the system tree, either the Agent to Skillset Assignment window or the Agent to Supervisor Assignment window appears.

The graphic on page 77 shows the assignment details that appear when you click an existing agent to skillset assignment from the system tree.



Assignment details table

The assignment details table shows you the agents and skillsets or agents and supervisors that are currently included in the assignment.

- To change the skillset priority of existing skillsets, click the skillset box in the appropriate agent row, and then type the new priority number, or type **Standby** to put the agent in standby mode for this skillset. When you are finished updating a skillset priority number in the table, click in any other box in the same row, or press **Tab**.
- To change the supervisor to whom an agent is assigned, click in the appropriate supervisor box and select the new supervisor from the drop-down list that appears.
- To save your changes in the table, after you have finished entering a value, you must click in any other cell to register the changes, and then click **Save Assignmen**t.

Note: When you are finished updating the table, you must click **Save Assignment** to save your changes. If you do not click this button, all your changes are lost.

Refresh Table button

Click **Refresh Table** only to revert to the last saved version of the assignment. When you click this button, the system removes all changes you make to the table but do not save. Refresh Table is useful if you have added new skillsets, skillset priority numbers, agents, or supervisors to the table in error and want to remove them before saving the assignment. In summary, Refresh Table

- removes any empty rows in the table
- removes new data that you have typed but do not want to save
- returns users to the table after you have hidden them with Hide User (before you click Save Assignment)

Hide User button

When you want to temporarily remove a user from the table (for example, when you are using an existing assignment as a template for a new assignment and do not want a user to be included in the new assignment), you can highlight the user in the table and click **Hide User**. To save your changes, you must click **Save Assignment**. When you click Save Assignment, the system saves everything that is visible in the assignment details table, so if you have hidden one or more users, then they are not included in the saved assignment.

Note: To return the user to the table, click **Refresh Table** before you click **Save Assignment**.

Go to Schedule button

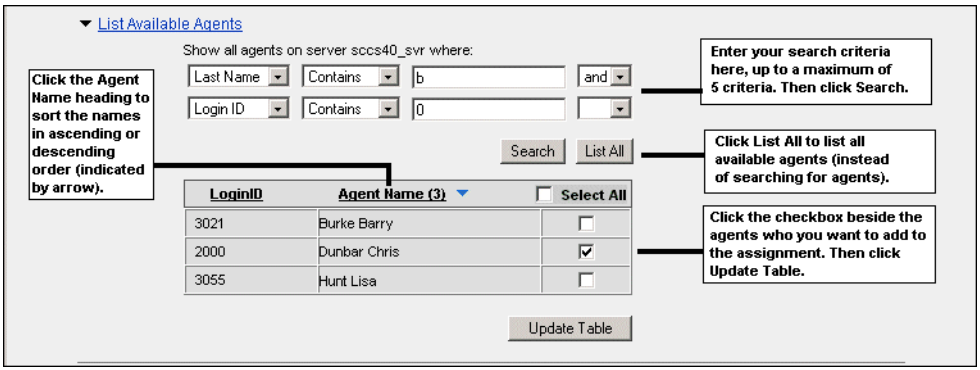
Click **Go to Schedule** after you have typed assignment information in the assignment details table and want to schedule the assignment. The Save/ Schedule Assignments section at the bottom of the window opens, enabling you to type schedule details. For more information on scheduling assignments, see “Example: Scheduling an agent to skillset assignment” on page 82. You can also consult the online Help for more details.

List Available Agents heading

Click this heading to search for unassigned agents who you want to add to your assignment. You can search by first name, last name, department, comment, login ID, or a combination of all of these criteria (up to a maximum of five). You cannot use the wildcard symbol (*) in your search.

Notes:

- You can search only among the agents included in the partition assigned to you, and in any supervisor/reporting agent combinations assigned to you.
- However, you can search among *all* configured agents if
  - you do not have a partition or supervisor reporting/agent combination assigned to you
  - you *only* have a partition, but it contains no agents
  - you *only* have a supervisor/reporting agent combination assigned to you (no partition)

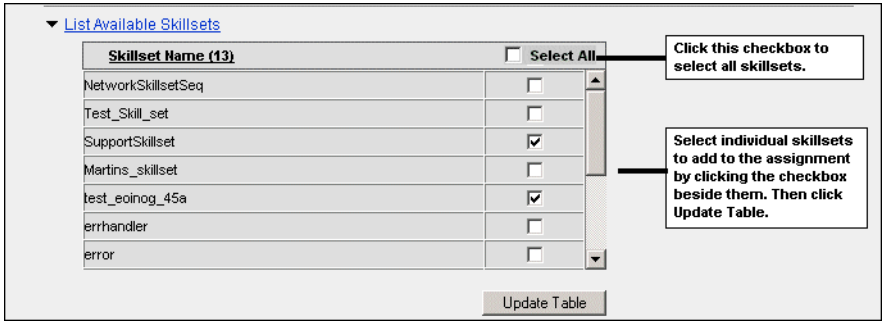


When entering the criteria for your search, use the and/or values in the last drop-down list to append search criteria; to clear search criteria, choose the blank value from this box. When you are satisfied with your criteria, click **Search**. In the resulting table, click the check box beside the names of the agents who you want to add to the assignment, or click the **Select All** check box at the top of the column to select all agents. Then click **Update Table**.

Note: When you click Update Table, the agents you have chosen *and* their current skillsets appear in the assignment details table.

List Available Skillsets heading

Click this heading to list all available skillsets on the currently selected server (those skillsets that are not already included in the assignment and, therefore, not appearing in the assignment details table). From the resulting table, you can automatically select all skillsets by clicking the **Select All** check box at the top of the table, or you can select individual skillsets from the table. When you have chosen all the skillsets, click **Update Table** to transfer them to the assignment details table.



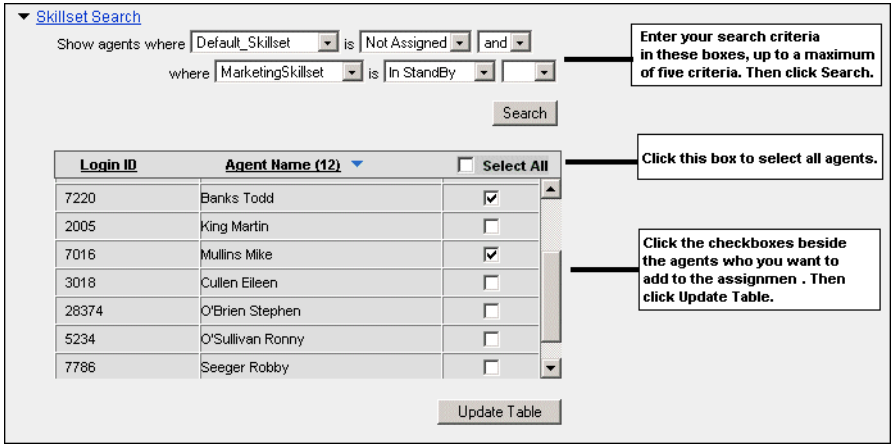
Notes:

- If you do not see a skillset to which you need access, it may be because your administrator has assigned the *Use Agent & Skillset Partitions* access level to you, and the skillset is not included in your partition. Contact your administrator and request that the skillset be added to the partition assigned to you.

Skillset Search heading

Click this heading when you need to quickly locate all agents on a server who are either assigned to a skillset, in Standby for a skillset, or who are not assigned to a particular skillset. Then, when you find the agents, you can add them to the current assignment. This feature is particularly useful when you notice high call volume for a skillset. You can locate all agents who are in Standby mode for the skillset so that you can assign them to handle the excess calls.

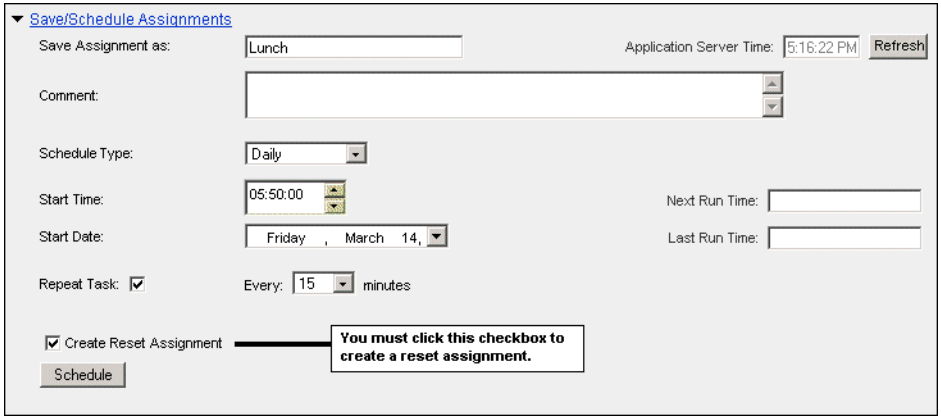
Note: You can search for a maximum of five skillsets.



Save/Schedule Assignments heading

After you have filled the assignment details table with the users and skillsets that you want to include in the assignment, and have chosen the correct skillset priority for all the skillsets, click **Save/Schedule Assignments** to enter the assignment name, select the schedule details, and save the assignment.

Note: You can click **Go To Schedule** under the assignment details table to jump directly to this section.



For details on all the boxes in this section of the window, see the online Help. To save or schedule an assignment, you must type an assignment name, and then choose the schedule type from the Schedule Type drop-down list. You can choose from Specific Date, Daily, Weekly, and Monthly, with different schedule options for each choice.

To create a reset assignment, you must click the check box beside **Create Reset Assignment**. When you are finished scheduling your assignment, click **Save Assignment,** and then click **Schedule**. The Next Run Time box indicates the next time when the assignment will be run, relative to the application server time shown.

Run Now button

After saving or scheduling an assignment, you can run it immediately by clicking **Run Now**. Note that if you open an existing saved or scheduled assignment, and you make any changes to it, you must click **Save Assignment** before clicking **Run Now**. When you run a scheduled assignment immediately, the assignment also runs at the scheduled time.

Example: Scheduling an agent to skillset assignment

This example shows you how to use the following features of the Agent to Skillset Assignment window in Contact Center Management:

- the assignment details table
- the Save/Schedule Assignments section

- the reset assignment option

In this example, you create and schedule an agent to skillset assignment that includes three agents. You have to reassign these three agents to new skillsets while the regular agents take a break every day from 3:00 to 3:30 p.m.

To schedule a new agent to skillset assignment

When working in assignments view, you must ensure that the assignment details table shows only those agents and skillsets that you want to include in the assignment because the system saves everything that is visible in this table to the assignment.

ATTENTION

Symposium Web Client only recognizes assignments that you schedule in Contact Center Management; likewise, the Symposium Call Center Server client only recognizes assignments that you schedule through its scheduling component. Therefore, when scheduling assignments, you must use either the Contact Center Management portion of Symposium Web Client *or* the Symposium Call Center Server client exclusively. You cannot use a combination of both client components to schedule assignments.

1 Click View/Edit → Assignments.

Result: The system tree collapses, and the assignments view of Contact Center Management opens.

2 On the system tree, log on to the server on which you want to work with assignments.

Result: The server expands to reveal the Agent Skillset Assignments and Agent Supervisor Assignments folders.

3 Right-click the Agent Skillset Assignments folder, and, from the resulting pop-up menu, click **Add Assignment**.

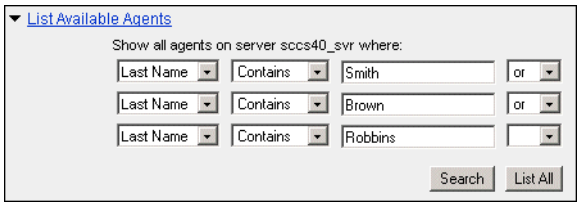
Result: The New Agent to Skillset Assignment window appears.

4 Click the **Assignment Details** heading to expand it.

5 Click the **List Available Agents** heading to use the agent search feature.

6 From the agent search drop-down lists, enter the search criteria for the three agents. You can search by first name, last name, login ID, comment, or department.

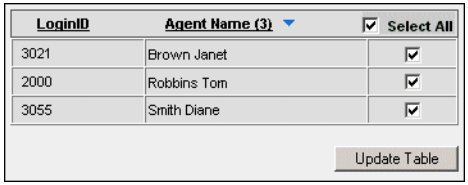
Tip: In this example, if you know that the last names of the agents are Smith, Brown, and Robbins, you can enter the following:



7 Click **Search**.

8 The agent names matching your search criteria appear in the results table.

9 Click the check box beside the Select All heading to select the three agent names, and then click **Update Table**.



Result: The agents you selected appear in the assignment details table at the top of the window, along with the skillsets that are already assigned to them.

10 Perform steps 6 to 9 until the assignment details table at the top of the window contains all agents who you want to include in the assignment.

Note: The Users table should now contain only the three agents who you want to include in the assignment (plus the skillsets that are already assigned to them).

11 Review the skillsets in the assignment details table. If you need to add new skillsets to the table, click **List Available Skillsets**.

Result: The list of available skillsets (those not yet assigned to the agents you have selected) appears in a new table.

12 Click the check box beside the skillsets that you want to add to the table, and then click **Update Table**.

Result: The skillsets appear in the assignment details table, along with the agents you have selected.

13 In the assignment details table, assign the skillsets to the agents by locating the skillsets in the table and typing the skillset priority numbers. The skillset priority numbers can range from 1–48, where 1 is the highest priority and 48 is the lowest priority. You can also put the agent in standby for a skillset by typing **Standby**. To unassign the agent from a skillset, leave the cell for this skillset blank.

14 After you type the last skillset priority number, click in any other box in the same row of the table, or press **Tab**.

15 When you have finished changing the skillset priority numbers, click **Go to Schedule**.

Result: The system moves the focus to the Save/Schedule Assignments heading.

16 Click the **Save/Schedule Assignments** heading.

Result: The heading expands to reveal a series of boxes.

17 In the Save Assignment As box, type the assignment name. This name must be unique.

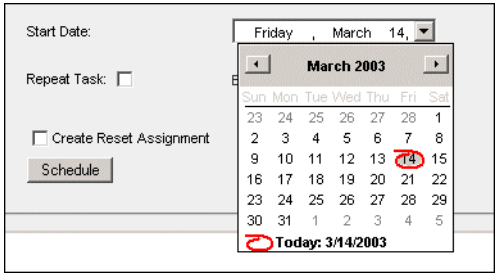
18 From the Schedule Type drop-down list, select **Daily**.

19 Beside the Application Server Time box, click **Refresh**.

Note: Click **Refresh** to give you the current application server time. The system generates all scheduled assignments based on this time so you must take this time into account when scheduling your assignments. For example, where you are, it is currently 9:00 a.m., but the application server time is 11:00 a.m., 2 hours later. Therefore, when you type a start time for your assignment, you type the time when you want to run the assignment, plus 2 hours. In this example, with the application server located in a time zone that is 2 hours later than your location, to schedule an assignment to run at 3:00 p.m., you type a start time of 5:00 p.m., 2 hours later. When it is 5:00 p.m. at the application server (and 3:00 p.m. where you are), the system runs the assignment.

20 In the Start Time box, type the start time, based on the application server time.

21 Click the triangle beside the Start Date box. A calendar appears, enabling you to select the start date.



22 Click the start date for the assignment.

23 Click the check box beside Create Reset Assignment. For more information on reset assignments, see “Reset assignments” on page 73.

Note: When you save the assignment, the system saves a reset assignment with the same name as the original assignment, but with a dash (__) at the end of the name. In this example, the original assignment is called *Lunchbreak*, and the reset assignment is called *Lunchbreak__*.

24 Click **Save Assignment**.

25 Click **Schedule** to activate the assignment’s schedule.

26 To reset the skillset assignment when the agents return from their break, you can use the reset assignment. On the system tree, click the reset assignment *Lunchbreak__*. The assignment properties appear in the Agent to Skillset Assignment window.

27 In the Save/Schedule Assignments section, from the Schedule Type drop-down list, select **Daily**.

28 Beside the Application Server Time box, click **Refresh**.

29 In the Start Time box, type the assignment start time, based on the application server time.

30 Click the triangle beside the Start Date box. A calendar appears, enabling you to select the start date.

31 Click the start date.

32 Click **Save Assignment**.

33 Click **Schedule** to activate the assignment's schedule. At 3:30 p.m., when the original agents return from their break, the system reassigns their skillsets back to them.

For details on creating, saving, and scheduling assignments, see the online Help included with Contact Center Management.

Chapter 3

Real-Time Reporting

In this chapter

Using real-time displays to monitor your call center

Introduction

You can use the Real-Time Reporting displays to identify service-level problems resulting from situations such as

- unusual numbers of unavailable agents
- unusual call volumes
- inefficient skillset assignments

You can monitor these situations on a per-site basis, or, if you work in a networked environment and have access to a Network Control Center (NCC) server, you can monitor all sites configured in your network by using the new network-consolidated real-time displays.

This section describes how to identify these situations from the standard real-time displays (the public displays shipped with Symposium Web Client). You can also create your own customized real-time displays.

Agents unavailable

To determine how many agents are unavailable at a site, use the Standard Agent Display and the Standard Skillset Display. To compare the statistics at all sites in the network, use the Consolidated Agent Position Status Count display.

On the Standard Agent Display, consider the following information:

- number of agents listed—Shows all agents currently logged on. If the number of logged on agents is low, you must determine why. Are agents sick, late, or on vacation?
- DN call statistics—Shows how many agents are currently active on DN calls.
- In Calls Status and Time In State—Shows how many agents are in Walkaway, Busy, or Active state, and for how long.

On the Standard Skillset Display, look at the following columns:

- Agents Staffed—Shows how many agents are logged on for this skillset.
- Agents Idle—Shows how many agents are waiting to take calls for this skillset.
- Agent Not Ready—Shows how many agents logged on to this skillset are in Not Ready state.

On the Consolidated Agent Position Status Count display, look at the following columns:

- In Service—Shows how many agents are logged on for this skillset at all network sites.
- Agents Waiting—Shows how many agents are waiting to take calls for this skillset at all network sites.
- Agent Not Ready—Shows how many agents logged on to this skillset are in Not Ready state at all network sites.

Call volume

To examine call volume for a skillset at one site in the network, use the Standard Skillset Display. If you have the networking feature enabled, you can view the call volume statistics for all sites in the network by using the Consolidated Skillset Display.

On the Standard Skillset Display, look at the following columns:

- Waiting—Shows the number of calls currently queued for the skillset. Skillsets with high numbers of calls waiting probably need more agents.
- Average Answer Delay—Shows how long, on average, callers waited in the skillset queue. Skillsets with long delays may need additional staffing.
- % Service Level—Shows how many calls met the targeted service level for the skillset. If the number is too low, you may need additional staffing.

On the Consolidated Skillset Display, look at the following columns:

- Waiting—Shows the number of local and network calls currently queued for the skillset at each site. Skillsets with high numbers of calls waiting probably need more agents.

- Average Answer Delay—Shows how long, on average, local and network calls waited in the skillset queue. Skillsets with long delays may need additional staffing.
- % Service Level—Shows how many local and network calls met the targeted service level for the skillset. If the number is too low, you may need additional staffing.

Inefficient skillset assignments

To identify inefficiencies in the assignment of agents to skillsets, use the Standard Agent Display, the Standard Skillset Display, and the Consolidated Agent Position Status Count display.

On the Standard Agent Display, look at the following columns:

- In Calls Status—Check the number of agents in Idle state.
- Time in State—Determine how long agents have been in Idle state.

On the Standard Skillset Display, look at the following columns:

- Agents Staffed—How many agents are logged on for this skillset?
- Agents Idle—How many agents are waiting to take calls for this skillset?

On the Consolidated Agent Position Status Count display, look at the following columns:

- In Service—How many agents are logged on for this skillset at all network sites?
- Waiting—How many agents are waiting to take calls for this skillset at all network sites?

Overview of real-time displays

Introduction

Real-time displays provide up-to-date statistics for your call center and its resources. You can use these statistics to monitor your call center and determine its effectiveness.

There are three main types of displays in Symposium Web Client:

- **Public displays** These displays include both the standard displays that ship with Symposium Web Client, and customized private displays that you have shared with your coworkers by saving them in the Public displays folder. To modify either of these types of displays in any way, you must make a copy of the display and save it as a *private* (user-defined) display.
- **Private displays** These are copies of public grid displays that you customize and save in your Private displays folder. Only the creator of the private display can access or modify it. To grant other users access to your private display, you must save a copy of it as a Public display. You can save public copies of private displays on the current server, or across all servers to which you have access.
- **Graphical displays** These are private graphical displays that you create and save in your private displays folder. Only the creator of the private display can access or modify it. You cannot make private graphical displays public. The graphical display formats are listed in the section below.

Display formats

You can view the Symposium Web Client real-time displays in the following formats:

- **Grid displays** These displays are arranged in table format, with the statistics appearing in rows and columns. They contain subtotals of data either for each site in the network, for each filter that you have applied, or for each element shown in the display (for example, each skillset), depending on the display configuration. They also contain a grand total of all statistics shown in the display. For more information, see “Subtotals and totals in real-time display grids” on page 120.

- **Chart displays** There are two types of chart displays in Real-Time Reporting: chart graphical displays that you configure and store on the system tree under the server of your choice, and summary charts that you can launch only from the grid displays. Summary charts summarize the statistics shown in the grid display from which you launch them, in either bar chart or pie chart format. You can launch a *site* summary chart from a nodal grid display, and a *network* summary chart from a network-consolidated grid display.
- **Agent maps** An agent map enables you to view a representation of all the agents to whom you have access in your call center in a single graphical display. Each agent is shown as a color-coded position block that indicates the agent's first name, last name (or both), agent state, time in state, login ID, and, optionally, the agent's position ID. You can customize your agent maps by choosing the threshold and agent state colors, and by rearranging the agent map icons to represent your call center layout. You can also choose whether to display the following combinations in the icon header:
  - agent first name, followed by last name
  - agent last name, followed by first name
  - agent first name and login ID
  - agent last name and login ID
- **Billboards** You can configure billboards only for skillset, application, and IVR data. A billboard enables you to choose one statistic that you want to monitor closely, such as the number of calls waiting, and one skillset or application (out of all skillsets and applications in your partition). Alternatively, instead of selecting one skillset or application, select Summary to view a summary of the statistic for all applications or skillsets in your partition on the selected server (for nodal graphical displays), or across all servers in the network (for network-consolidated graphical displays), or for all IVR queues on the selected server. When you launch the billboard, the statistic appears as a large, colored number that updates at the default refresh rate of 5 seconds.

  Note: When you create IVR billboards, you can only view a summary of the chosen statistic across all IVR queues on the selected server; you cannot select a particular IVR queue.
- **Collections** A collection is a group of real-time displays appearing in one window, that enable you to view multiple types of statistics simultaneously.

You can configure a collection to include a maximum of three grid displays and three billboard or chart displays.

Types of real-time displays

The following types of nodal real-time displays are available in Symposium Web Client:

- agent
- application
- IVR (M1/Succession 1000/M1 IE switch only)
- route (M1/Succession 1000/M1 IE switch only)
- skillset
- call center summary (nodal)

The following types of network-consolidated real-time displays are available in Symposium Web Client (for the M1/Succession 1000/M1 IE networking switch only):

- agent
- skillset
- application

Note: The current release of the Succession 1000 switch only supports networking over ISDN trunks.

Partitions, supervisor/reporting agent combinations, and real-time data

Supervisor/reporting agent combinations are like partitions containing agents, with a few notable differences, as outlined below. Your administrator can assign to you a partition containing agents, or both a partition and a supervisor/ reporting agent combination.

Partitions enable the administrator to control the amount and type of data that each Web Client user can see. When your call center administrator configures your user profile in Access and Partition Management, he or she specifies the skillsets, applications, and optionally, the agents that you can view in the real-time displays by creating partitions and assigning them to you. The agents are optional in partitions only if your administrator also assigns at least one supervisor/reporting agent combination to you.

Note: Only partitioned data appears in standard real-time displays; the agents in supervisor/reporting agent combinations do not appear in standard displays. Therefore, if your administrator assigns to you a partition containing no agent data, and a supervisor/reporting agent combination, you do not see any agents in the standard real-time displays. For more information, see “Partitions and supervisor/reporting agent combinations in Real-Time Reporting” on page 98.

If an administrator does not assign a partition to you, then you see all available data in the real-time displays. However, once an administrator assigns a partition to you, it restricts the data that you can see to the data included in the partition (plus any agents in the supervisor/reporting agent combinations assigned to you). For example, if the administrator assigns a partition to you containing only report groups, CDNs, and DNISs, then you do not see any data in Real-Time Reporting because there are no agents, applications, and skillsets in your partition, and you have not been assigned a supervisor/reporting agent combination.

The administrator must assign a combination of partitions and supervisor/reporting agent combinations to you that contain all the applicable agents, applications, and skillsets for you to be able to view the data in the real-time displays. If you cannot see important data in the real-time displays (for example, one of your agents), contact your administrator and request that the data be added to the partition assigned to you, or request that the administrator assign the supervisor/reporting agent combination containing your agents to you.

Notes:

- If your administrator assigns a partition to you that does not contain any agents, and does *not* assign a supervisor/reporting agent combination to you, then you will not see *any* agent data in the real-time displays.

- If your administrator does *not* assign a partition to you, then you see *all* call center data in the standard real-time displays, regardless of whether you have a supervisor/reporting agent combination assigned.
- However, if your administrator only assigns a supervisor/reporting agent combination to you (and not a partition), then you can apply this combination to your private agent real-time displays and agent map graphical displays, just as you would apply a custom filter. When you launch the display, you see only those agents reporting to the supervisor whose name you selected.

Supervisor/reporting agent combinations are dynamic

Since partitions are not dynamic, whenever a new agent is assigned to you (either by you or your administrator), your administrator must update the partition assigned to you to include the new agent; otherwise, you will not see the agent in the real-time displays. To avoid having to update the list of agents in the partition, your administrator can use the supervisor/reporting agents feature to associate your Web Client user profile with your supervisor profile (which, in turn, is linked to all your reporting agents).

This association is dynamic, meaning that each time a new agent is assigned to you (either by you or your administrator), the agent is automatically associated with your supervisor profile. In addition to this association, your administrator can create a partition containing the appropriate skillsets and applications that you need to view in the real-time displays. The combination of the partition and the supervisor/reporting agent association enables you to always have an up-to-date list of agents, and to view their skillsets and applications in the real-time displays.

Note: When a new agent is assigned to you, you must close and reopen the display you are currently viewing to see this new agent.

For information on applying the supervisor/reporting agent combinations to your real-time displays, see “Assigning supervisor/reporting agent combinations to real-time displays” on page 117.

Partitions and supervisor/reporting agent combinations in Real-Time Reporting

Partitions and the supervisor/reporting agents feature behave differently in Real-Time Reporting, based on the type of display you open, and whether you assign a supervisor/reporting agent combination or a filter to the display (or, in some cases, both). When your administrator assigns you a partition, you can decide which data you want to see by creating a filter containing the desired data and assigning the filter to the private real-time displays.

Just as you can assign a filter to a private display so that you see only the filtered information in the display, so too can you assign a supervisor/reporting agent combination to view all the applicable reporting agents in the agent display. Both the filters you have created and the supervisor/reporting agent combinations assigned to you appear on the Filters tab in Real-Time Reporting. You can assign a filter, a supervisor/reporting agent combination, or sometimes both, to a display.

This section outlines the differences in the following three types of displays:

- **standard real-time displays** Since you cannot apply either filters or supervisor/reporting agent combinations to standard displays, only partitioned data is shown in this type of display.
- **private agent real-time displays** If your administrator has assigned you a partition, then you can choose the data you want to see in the display by creating a custom filter and assigning it to the display. If your administrator has also assigned you a supervisor/reporting agent combination (in Access and Partition Management), you can also assign the combination to the display to view the corresponding reporting agents. You can assign a filter, a supervisor/reporting agent combination, or both, to the display.
- **agent map graphical displays** Agent map graphical displays are similar to private agent real-time displays, except you *must* assign either a filter or a supervisor/reporting agent combination to the display, but you cannot assign both at the same time.

The behavior of partitions and supervisor/reporting agent combinations is different in each type of display. The following table summarizes all scenarios and the results in Real-Time Reporting. In this example, it is assumed that you have been assigned a partition containing agents and the supervisor/reporting agent combination containing all your reporting agents.

Type of display	You assign this to the display	What you see in the display
Standard real-time display	You cannot assign filters or supervisor/reporting agent combinations to standard displays.	Only the agents (and any other data) included in the partitions assigned to you. Supervisor/reporting agent combinations are not applicable to standard real-time displays and, therefore, the agents included in these combinations do not appear.
Private agent real-time display	You do not assign anything to the display (neither a filter containing partitioned agents, nor a supervisor/ reporting agent combination).	All the agents in your partition. The agents in the supervisor/reporting agent combination do not appear.
	You assign a filter containing a subset of your partitioned agents, but do not assign a supervisor/ reporting agent combination.	Only the partitioned agents that you have added to the filter, not the reporting agents from the supervisor/ reporting agent combination.
	You assign a supervisor/ reporting agent combination, but do not assign a filter containing partitioned agents.	Only your reporting agents.

Type of display	You assign this to the display	What you see in the display
	You assign *both* a supervisor/reporting agent combination, and a filter containing partitioned agents.	All your reporting agents, plus any partitioned agents that you have added to the filter.
Agent map graphical display*	You assign a filter containing some of your partitioned agents.	Only the agents included in the filter, none of the agents in the supervisor/ reporting agent combination.
	You assign a supervisor/ reporting agent combination.	Only your reporting agents, none of the agents in the partition assigned to you.

*You must assign *either* a filter containing some of your partitioned agents or a supervisor/reporting agent combination to an agent map graphical display; you must assign one of these to launch the display, but cannot assign both at the same time.

Nodal real-time displays

Symposium Web Client offers you the same six nodal real-time displays included with the Symposium Call Center Server client (Agent, Application, IVR, Nodal M1, Route, and Skillset). Nodal real-time displays provide you with a real-time view of call center activities on a per-site basis. You can customize the standard nodal displays by arranging the columns, applying filters and supervisor/reporting agent combinations, and changing the colors. For more information, see “Configuring private display properties” on page 109.

Network-consolidated real-time displays

In addition to the standard nodal displays, Symposium Web Client offers the following three new network-consolidated displays (only if you have networked servers in Symposium Call Center Server):

- Consolidated Agent Position Status Count
- Consolidated Application Display
- Consolidated Skillset Display

These displays provide you with an overall, real-time view of call center activities across a network linked by multiple servers in Symposium Call Center Server. You can launch these displays if you have access to a Network Control Center (NCC) server. For a list of all the statistics columns included in the standard displays, see Section B: “Network-consolidated real-time displays” on page 159.

The displays offer subtotals of activity for each Symposium Call Center Server site in the call center network, and a grand total of all statistics shown on the display. For more information, see “Subtotals and totals in real-time display grids” on page 120.

Public real-time displays

Public displays include both nodal and network-consolidated displays (if you work in a networked environment). There are two types of public displays in Symposium Web Client:

- **Standard real-time displays** The set of standard, real-time displays that are shipped with the software and that every Real-Time Reporting user can access. The contents of these real-time displays are predefined and cannot be modified. You can launch these displays from the Public displays folder under each server on the system tree, or you can make copies of them and save them in your Private displays folder. Nobody can delete the standard public displays.
- **Private real-time displays** The copies of private displays that users have saved in the Public displays folder. After you have customized a private real-time display, you can share it with other users by making a public copy of it. You can choose to copy the display to the Public displays folder on the same server as the private display, or across all servers to which you have access in the network. The copied display retains all your customized settings *except* filter information.

  Like all standard public displays, public copies of private displays contain no filter information. To add filters to these public displays, users must make private copies of them first. To delete these displays, you must have administrator privileges and be logged on to the server as *webadmin*. For more information on making public copies of private displays, see the online Help.

Private real-time displays

Private real-time displays are those that you create yourself by making copies of the public displays and modifying them to display the type of information that you need to monitor your call center. When you save a display in your Private displays folder, only you, the display creator, can access the display.

You can apply color schemes, add custom formulas, and insert or remove statistics columns. You can also apply filters to most of the real-time displays (all except the Standard Nodal, IVR, and Route displays). Filters enable you to specify the skillset, application, and agent data that you want to see in your

displays. In addition, only for your private, customized agent displays, you can apply supervisor/reporting agent combinations. For more information, see “Assigning supervisor/reporting agent combinations to real-time displays” on page 117.

You can also share your customized real-time displays with other users by making public copies of them. For more information, see “Making public copies of private displays” on page 119.

Data collection modes

Moving window mode

In moving window mode, statistics shown represent the last 10 minutes of system activity.

Interval-to-date mode

In interval-to-date mode, statistics are collected only for the current interval. When the interval is over, data fields initialize to 0 (zero), and collection begins for the next interval.

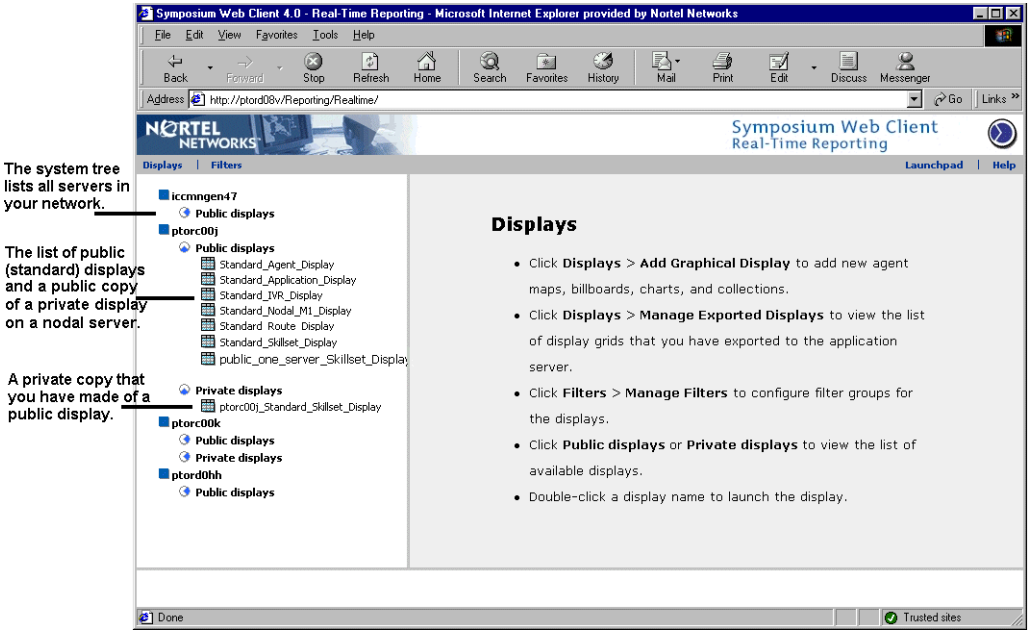
Note: Verify with your administrator that he or she has enabled the mode of your choice on Symposium Call Center Server using the Real-Time Statistics Multicast configuration tool.

Working with real-time displays

Introduction

The Real-Time Reporting main window enables you to log on to any of the servers shown on the system tree and work with its public or private displays.

Note: The system lists private displays under a server only after you create them.

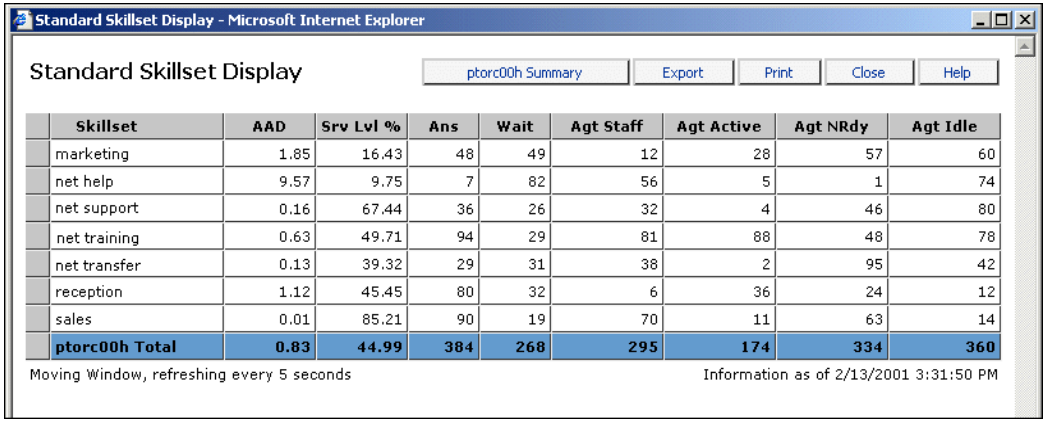


You can launch a display with its default properties directly from the system tree by double-clicking the display name. The grid display opens in a separate window and updates at the default refresh rate for public displays, or at the rate that you specified for the private display.

The default refresh rate for public displays varies based on the type of display that you launch.

- Network-consolidated displays have a default refresh rate of 5 seconds.

- The Standard Agent nodal display has a default refresh rate of 1 second.
- All other standard nodal displays have a default refresh rate of 2 seconds.



Skillset	AAD	Srv Lvl %	Ans	Wait	Agt Staff	Agt Active	Agt NRdy	Agt Idle
marketing	1.85	16.43	48	49	12	28	57	60
net help	9.57	9.75	7	82	56	5	1	74
net support	0.16	67.44	36	26	32	4	46	80
net training	0.63	49.71	94	29	81	88	48	78
net transfer	0.13	39.32	29	31	38	2	95	42
reception	1.12	45.45	80	32	6	36	24	12
sales	0.01	85.21	90	19	70	11	63	14
ptorc00h Total	**0.83**	**44.99**	**384**	**268**	**295**	**174**	**334**	**360**

ATTENTION

The fastest rate at which real-time data from Symposium Call Center Server can reach the end-user in Symposium Web Client is equal to the highest value among the following settings:

- the Multicast Rate (set on Symposium Call Center Server)
- the Output Rate (set on the application server)
- the Transform Rate (set on the application server)

Example

If the Symposium Call Center Server Multicast Rate is set to 2 seconds, the application server Transform Rate is set to 1 second, and the application server Output Rate is 7 seconds, then the data on the client PC will not refresh faster than every 7 seconds, regardless of the refresh rate that you choose in Real-Time Reporting.

If the refresh rate that you set for your private real-time displays is faster than the rate at which the application server sends real-time data, your displays will refresh at the rate you set, but you will not see changes to your data in every refresh cycle. Contact your administrator for more information about the rates set on the application server and the server in Symposium Call Center Server.

To launch links from Microsoft Outlook in a new browser window

When you are viewing a display on your desktop, if you choose to open a link to another Internet site from Microsoft Outlook, the new web page may replace the real-time display in the same browser window.

To keep the real-time display open and launch links from Microsoft Outlook in a new browser window, follow these steps:

1 In Internet Explorer, click Tools → Internet Options.

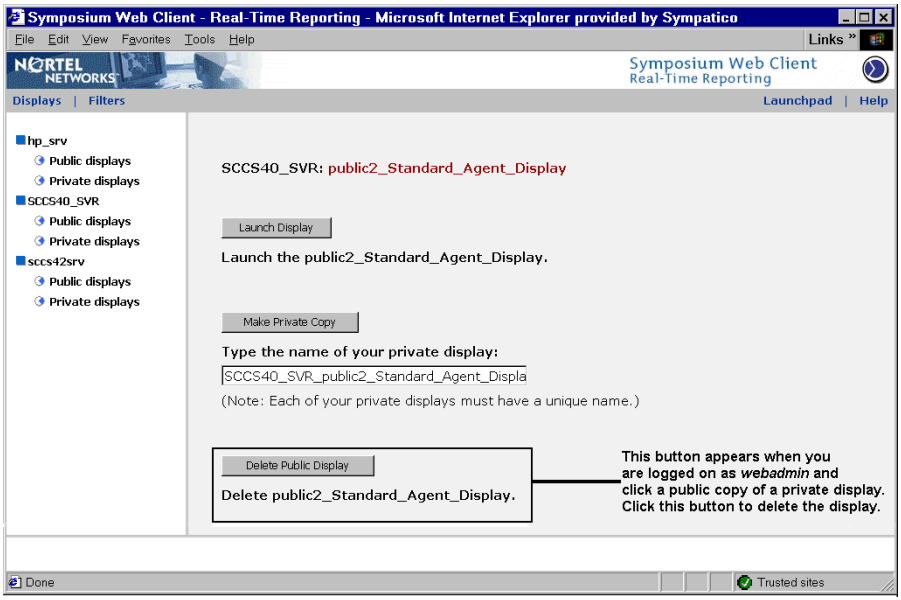
2 Click the **Advanced** tab.

3 Under Browsing, ensure that the check mark beside Reuse windows for launching shortcuts is deselected.

4 Click **OK**.

Deleting public copies of private displays

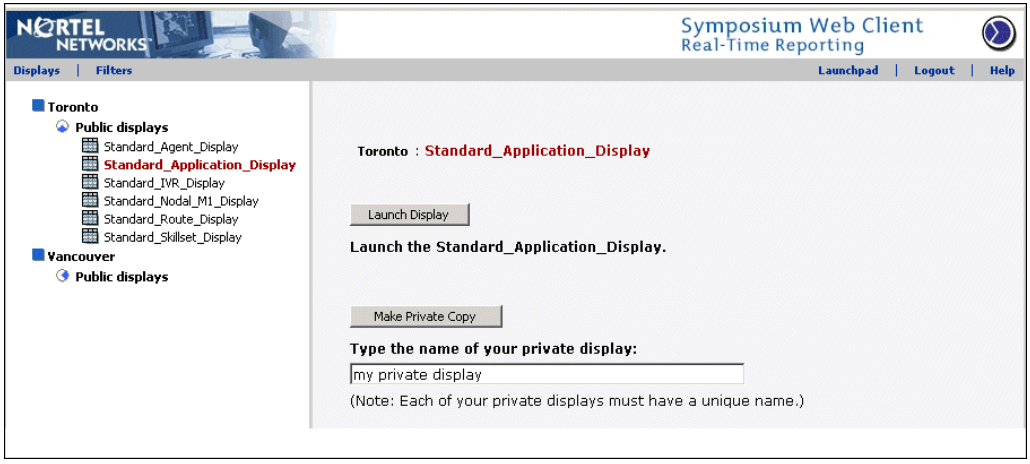
When you click a public display that is a copy of a private display (instead of a standard public display), then you have the option of deleting the display if you have administrator rights and are logged on as *webadmin*.



Note: The Delete Public Display button *only* appears if you click a public copy of a private display *and* if you are logged on to the server as *webadmin*.

Creating private displays

When you click a public display on the system tree, you have the option of launching the display, or making a copy of it and saving it in your Private displays folder.


NORTEL NETWORKS
Symposium Web Client
Real-Time Reporting
Displays | Filters
Launchpad | Logout | Help
Toronto
Public displays
Standard_Agent_Display
Standard_Application_Display
Standard_IVR_Display
Standard_Nodal_M1_Display
Standard_Route_Display
Standard_Skillset_Display
Vancouver
Public displays
Toronto : Standard_Application_Display
Launch Display
Launch the Standard_Application_Display.
Make Private Copy
Type the name of your private display:
my private display
(Note: Each of your private displays must have a unique name.)

Configuring private display properties

When you make a private copy of a public display, you can specify the following display properties:

- the display refresh rate (minimum 0.5 seconds, or 1 to 99 seconds)

ATTENTION

The fastest rate at which real-time data from Symposium Call Center Server can reach the end-user in Symposium Web Client is equal to the highest value among the following settings:

- the Multicast Rate (set on Symposium Call Center Server)
- the Output Rate (set on the application server)
- the Transform Rate (set on the application server)

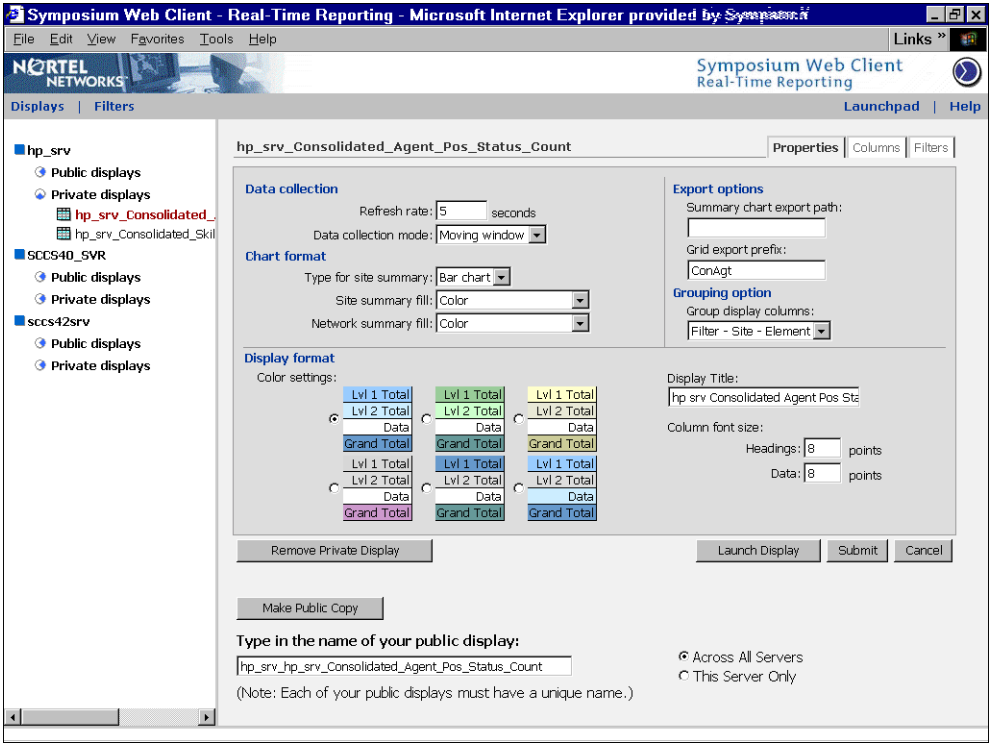
Example

If the Symposium Call Center Server Multicast Rate is set to 2 seconds, the application server Transform Rate is set to 1 second, and the application server Output Rate is 7 seconds, then the data on the client PC will not refresh faster than every 7 seconds, regardless of the refresh rate that you choose in Real-Time Reporting.

If the refresh rate that you set for your private real-time displays is faster than the rate at which the application server sends real-time data, your displays will refresh at the rate you set, but you will not see changes to your data in every refresh cycle. Contact your administrator for more information about the rates set on the application server and the server in Symposium Call Center Server.

- the data collection mode (either moving window or interval-to-date)
- the summary chart type (bar chart or pie chart) and fill color (color or black and white) for all displays except the Standard Agent Display, Standard Route Display, and Standard Nodal Display
- the path for summary charts that you export as either .bmp or .jpg files, and file name prefix for grid displays that you export to the application server

- the grouping of the first three columns in the network-consolidated displays (not shown in the following diagram). The order that you specify affects the subtotals that you see in the display. For more information, see “Subtotals and totals in real-time display grids” on page 120.
- the colors of the display rows (the filter and site subtotals and grand total)
- the display title
- the font size of the statistics shown in the display
- whether you want to make a public copy of your private display across all servers in the network to which you have access, or only on the currently selected server

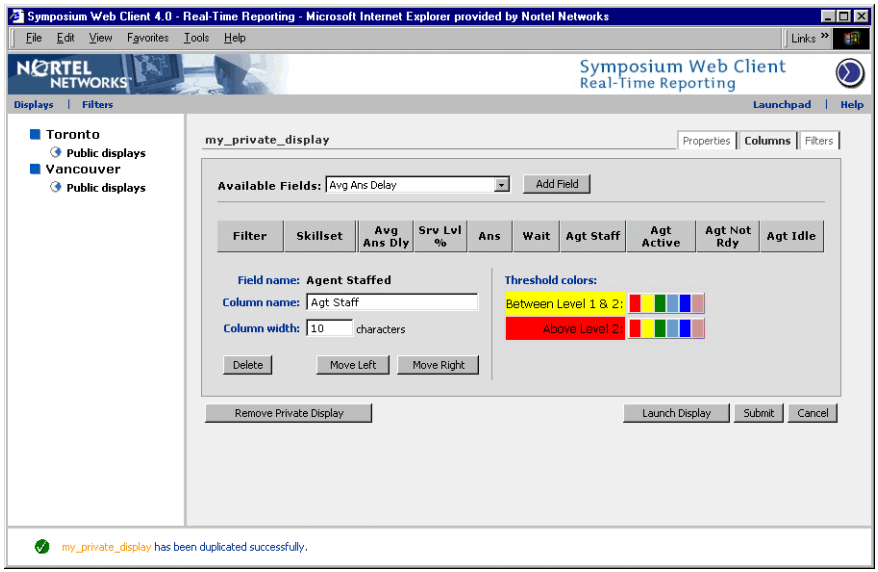


Choosing and arranging columns in private displays

There are two kinds of columns in the real-time display grids: system columns (the site name, filter name, and skillset or application name), and statistics columns, which contain the statistics values that update in real time.

For private network-consolidated displays, you can choose the order of the three system columns in the Properties tab. The order you choose determines the subtotals shown in the display. For more information, see “Subtotals and totals in real-time display grids” on page 120.

You can remove, rename, and arrange the order of the statistics columns in your private displays. In addition, for nodal displays only, you can add new columns and custom formulas to the displays, and assign threshold colors to some of the display columns.



Formulas

Real-Time Reporting includes some system-defined formulas, such as the Average Answer Delay. You cannot change system-defined formulas. However, your administrator can create custom formulas by combining existing fields and mathematical operators. You can then add these custom formulas to your private nodal displays just as you add any other type of statistics column.

For more information on customizing your displays, see the online Help included with Real-Time Reporting.

Thresholds in real-time display grids

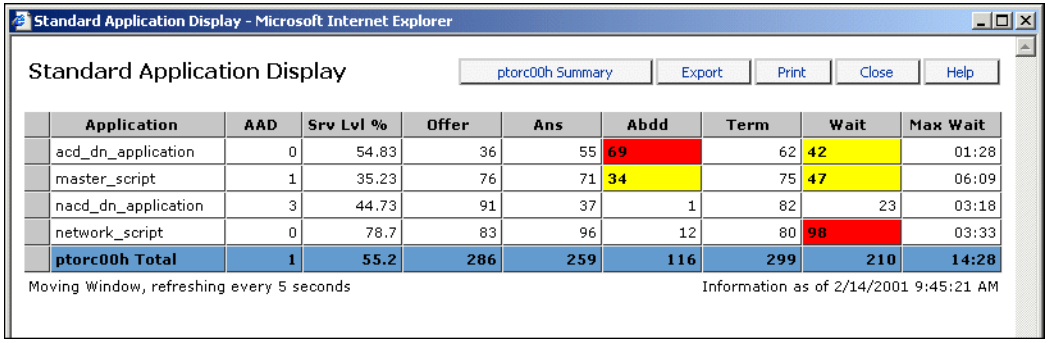
Thresholds are used to highlight exceptional conditions in the call center. There are two threshold values that your administrator can define for system activity: the low value (level 1), and the high value (level 2). These values result in three operational levels:

- **Below level 1** Based on the type of statistic, this level can mean normal call center operation and no action required (that is, the lower the number of calls waiting, the better), or it can signify an alert situation that requires attention (that is, the lower the service level percentage, the worse the situation).
- **Between level 1 and level 2** Action may be required to prevent call center performance from moving beyond acceptable operating levels.
- **Above level 2** Based on the type of statistic, this level can mean normal call center operation and no action required (that is, the higher the service level percentage, the better), or it can signify an alert situation that requires attention (that is, the greater the number of calls waiting, the worse the situation).

Thresholds are applicable to both nodal and network-consolidated real-time displays. However, they behave differently for each type of display, as described below.

Thresholds in nodal real-time displays

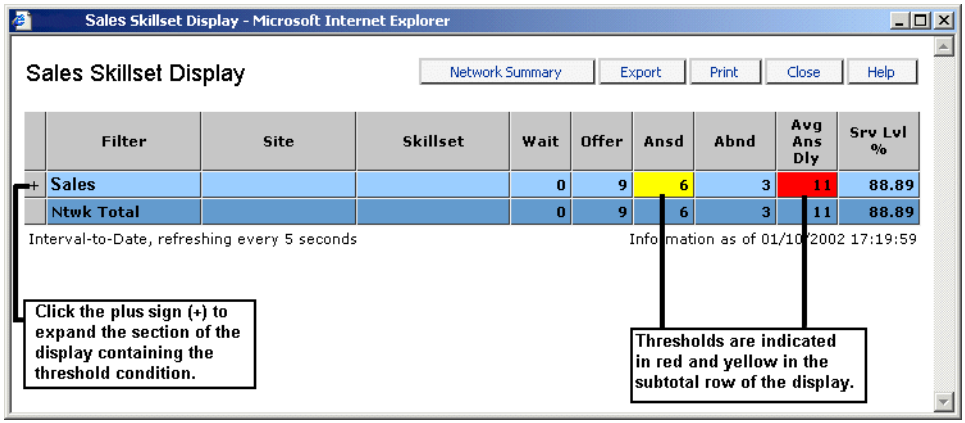
When you customize the columns of your private *nodal* displays, you can specify the colors for the real-time statistics that exceed the defined threshold values. When you launch your private nodal display, statistics that exceed the threshold values appear in the color you have chosen, as shown in the graphic on page 113.



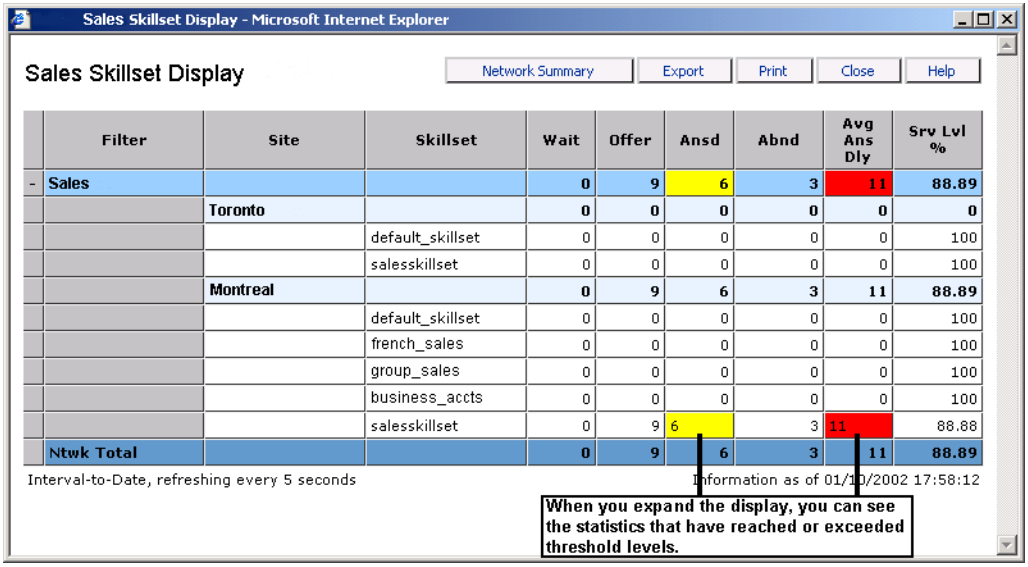
Thresholds in network-consolidated real-time displays

You cannot choose the threshold colors for your private *network-consolidated* real-time displays; statistics that exceed the level 1 value appear in yellow, while those that exceed the level 2 value appear in red. In these displays, when statistics exceed a threshold value, the subtotal row in the applicable section indicates which column in the display contains this statistic.

In the following display, for example, there are two threshold conditions in the Sales filter, as shown in the subtotal line.



To view the statistics that have exceeded the threshold levels, manually expand the section by clicking the plus sign (+) beside the filter name. The statistics appear highlighted in the appropriate threshold colors, as shown below:



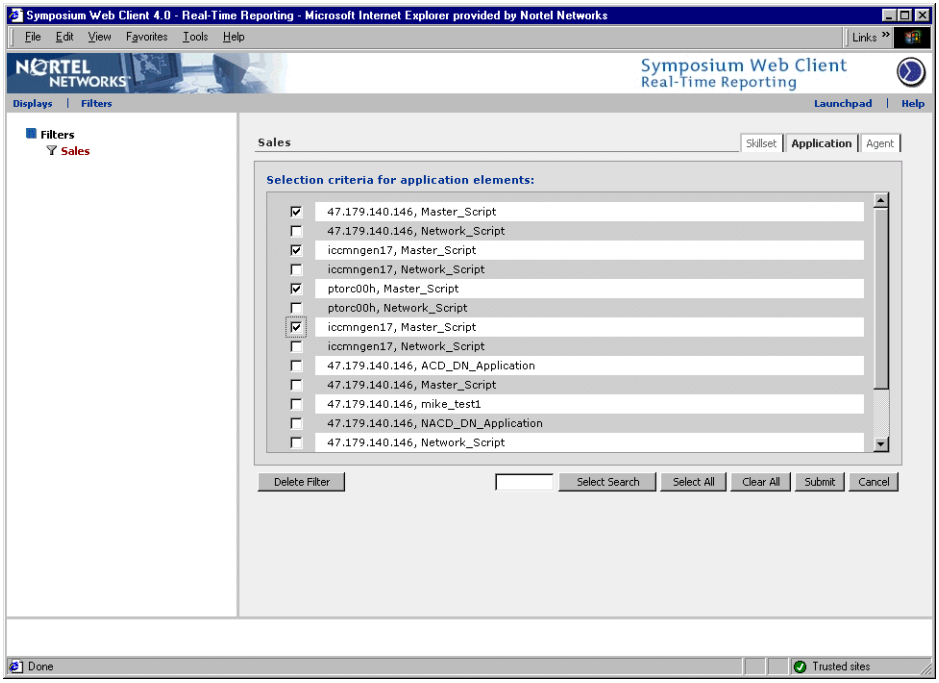
Adding filters to real-time displays

There are two features that enable you to control the data that you want to see in your private real-time displays: filters and supervisor/reporting agent combinations. This section includes details on creating and assigning filters. For information on supervisor/reporting agent combinations, see “Assigning supervisor/reporting agent combinations to real-time displays” on page 117.

Filters enable you to specify the agents, skillsets, and applications that you want to see in your private real-time displays.

After you apply filters to the real-time displays, you no longer have to scan data that is not applicable to you. For example, if you are the supervisor in the Sales department, you can create a filter containing data applicable only to Sales and apply it to all your private real-time displays.

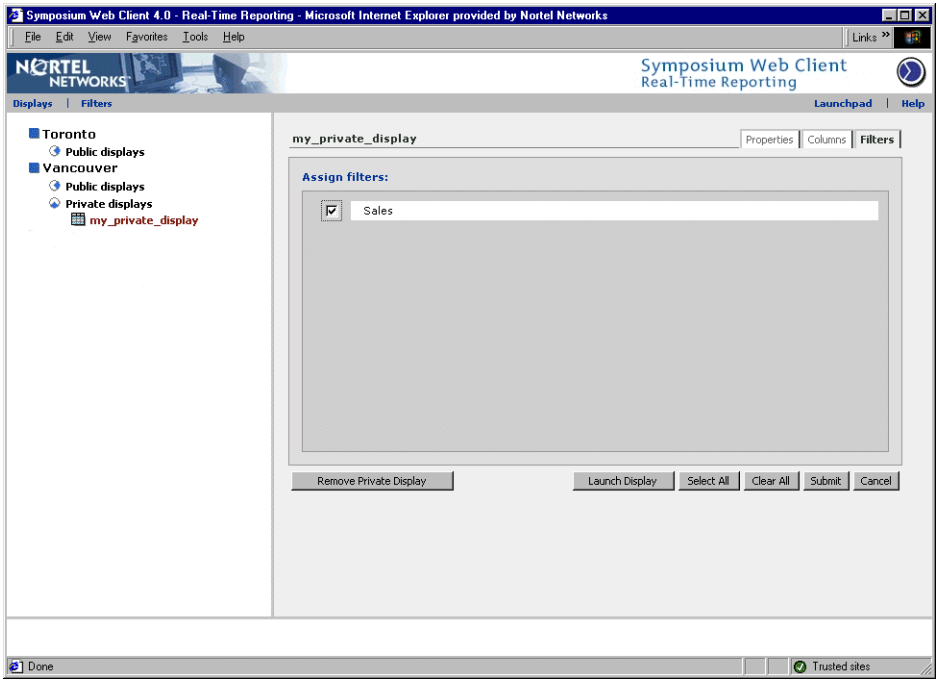
You must create and save the filters in the Filters window of Real-Time Reporting before you can assign them to the real-time displays.



Note: Your call center administrator must assign a partition to you containing agents, skillsets, and applications before you can create filters with each type of data. If your administrator has not assigned a partition to you, then you cannot create filters. You can view *all* call center data in the real-time displays, but you cannot specify the data that you *want* to see.

You can apply as many filters as you want to each display. However, if you have included the same skillset or application in two or more filters on one real-time display, to accurately provide the total values, the system discounts duplicates in the total calculation. For example, on one real-time display, if you have specified that filter 1 includes Toronto Sales, Toronto Marketing, and Toronto Customer Service, while filter 2 includes Toronto Sales, Montreal Sales, and Vancouver Sales, the network total includes only one Toronto Sales value.

After you create filters, you can apply them to your private real-time displays in the Filters tab.



ATTENTION

Data elements appear in the display only if the system has collected real-time statistics for the element. If there are no reported real-time statistics for the element, then it does not appear in the display.

For more information on configuring and assigning filters, see the online Help included with Real-Time Reporting.

Assigning supervisor/reporting agent combinations to real-time displays

When you customize an agent display, you can assign one or more supervisor/reporting agent combinations to the display. Unlike filters, which you create by specifying the agents, applications, and skillsets that you want to see, you cannot create supervisor/reporting agent combinations. Instead, when your administrator configures your Web Client user profile in Access and Partition Management, he or she assigns these combinations to you on a per-server basis.

When you customize the agent display on a server on which your administrator has assigned a supervisor/reporting agent combination to you, click the **Filters** tab to see the list of filters that you have created, and the supervisor/reporting agent combinations assigned to you. Each supervisor's name on the Filters tab represents a supervisor and *all* of his or her reporting agents.

Using both supervisor reporting/agent combinations and filters

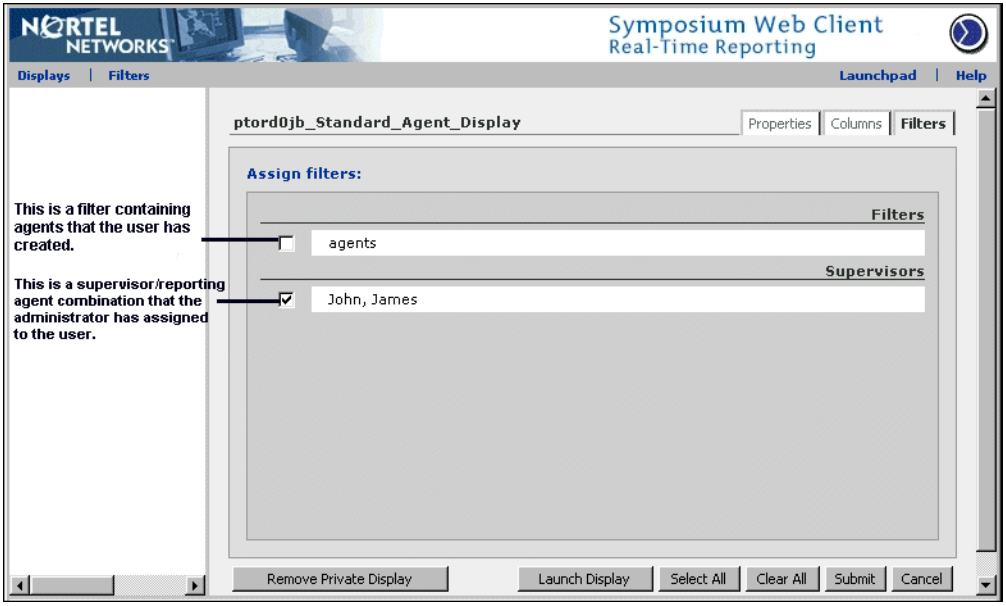
To include all your reporting agents in the display, as well as any of your associated agents that are included in the partition assigned to you, use a combination of filters and supervisor/reporting agent combinations. For example, to see *all* your reporting agents in the display, click the supervisor/reporting agent combination corresponding to your supervisor profile. In addition, create and assign a filter containing your associated agents. When you launch the display, you see all your reporting agents and the associated agents who you have included in the filter.

ATTENTION

If the supervisor/reporting agent combination and the filter assigned to a display each contain the same agent, then this agent appears *twice* when you launch the display. Therefore, to avoid duplicated data, configure the filter so that it does not contain any of the same agents as the supervisor/reporting agent combination.

Example

The following graphic shows the Filters tab for a customized agent display, containing a filter the user has created and called "agents," and a supervisor/reporting agent combination for supervisor James John (and all his reporting agents).



To assign the supervisor/reporting agent combination, click the check box beside James John's name.

To see an example of how using both filters and supervisor/reporting agent combinations can enable you to act as the associated supervisor for a group of agents, see "Supervisors and associated supervisors" on page 39.

Supervisor/reporting agent combinations are dynamic

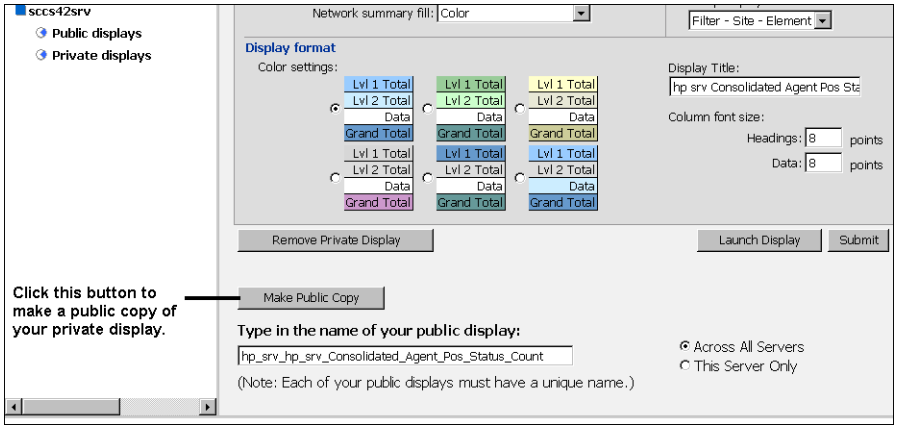
One benefit of assigning a supervisor/reporting agent combination to a display (instead of a filter containing your reporting agents) is that these combinations are automatically updated to reflect the agents assigned to you. When you or another user assigns a new agent to you, the agent is automatically included in the corresponding supervisor/reporting agent combination, and, therefore, automatically appears in the display to which the combination is assigned.

Making public copies of private displays

After you have customized a private real-time display, you can share it with other users by making a public copy of it. You can choose to copy the display to the Public displays folder on the same server as the private display, or across all servers to which you have access in the network.

To make a copy of a private display, click the display name in the server tree. Then, in the resulting Properties tab, type a name for the public display, choose the server on which you want to copy the display, and click **Make Public Copy**. The copied display appears under the selected servers in the Public displays folder, enabling all users who have access to the server to use your display.

The copied display retains all your customized settings *except* filter information. Like all standard public displays, public copies of private displays contain no filter information. To add filters to these public displays, or to change them in any way, users must make private copies of them first.



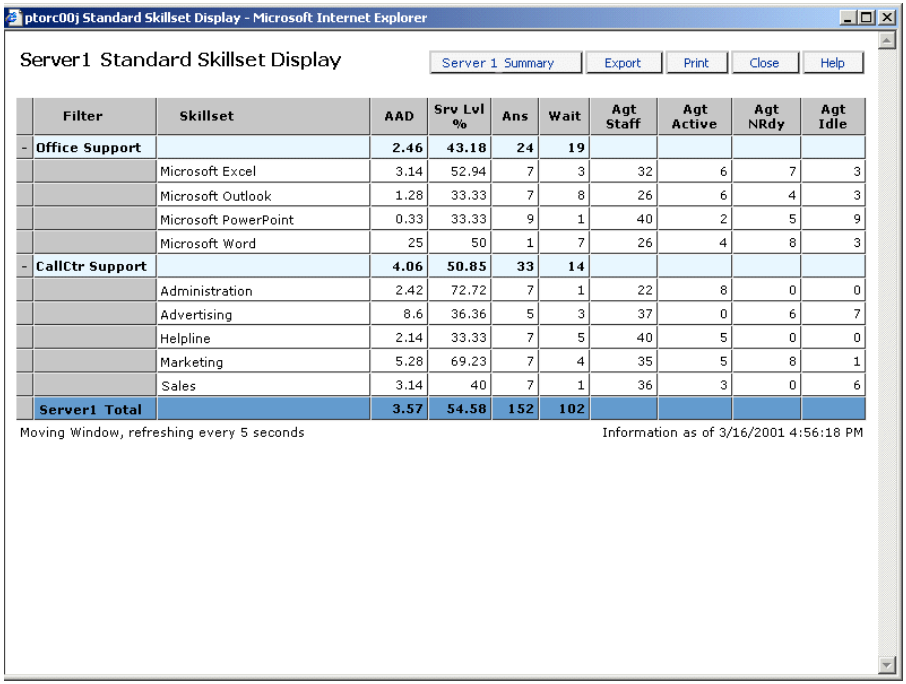
Subtotals and totals in real-time display grids

Introduction

The subtotals shown in the real-time display grids differ according to the type of display (nodal or network consolidated), and whether you have applied filters to the display. You can choose the colors for the subtotal lines in the Properties tab. For more information, see “Configuring private display properties” on page 109.

Nodal display subtotals and totals

In nodal real-time display grids, you can see subtotals for each filter that you have applied to the display, and a grand total for all of the site’s statistics at the bottom of the display.



	Filter	Skillset	AAD	Srv Lvl %	Ans	Wait	Agt Staff	Agt Active	Agt NRdy	Agt Idle
-	**Office Support**		**2.46**	**43.18**	**24**	**19**				
		Microsoft Excel	3.14	52.94	7	3	32	6	7	3
		Microsoft Outlook	1.28	33.33	7	8	26	6	4	3
		Microsoft PowerPoint	0.33	33.33	9	1	40	2	5	9
		Microsoft Word	25	50	1	7	26	4	8	3
-	**CallCtr Support**		**4.06**	**50.85**	**33**	**14**				
		Administration	2.42	72.72	7	1	22	8	0	0
		Advertising	8.6	36.36	5	3	37	0	6	7
		Helpline	2.14	33.33	7	5	40	5	0	0
		Marketing	5.28	69.23	7	4	35	5	8	1
		Sales	3.14	40	7	1	36	3	0	6
	Server1 Total		**3.57**	**54.58**	**152**	**102**				

Note: For statistics such as Agents Staffed, Agents Active, Agents Not Ready, and Agents Idle, the displays do not show the totals since one agent is typically assigned to more than one skillset, which makes these totals misleading.

Network-consolidated display subtotals and totals

In the network-consolidated real-time displays, the subtotals you see depend on the grouping of the three system columns: the site name, filter, and the element type (skillset or application name).

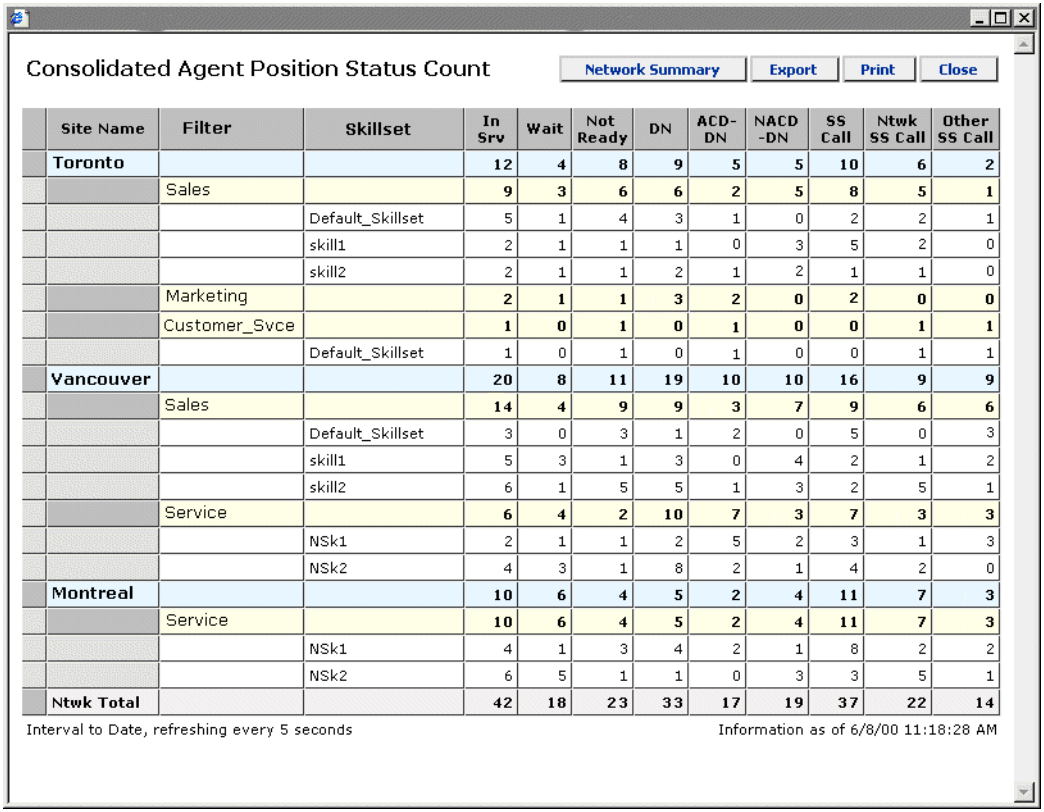
You can arrange the order of these three columns when you customize your private network-consolidated real-time displays. For more information, see "Configuring private display properties" on page 109.

There are three different grouping arrangements for these columns:

- Filters followed by site names (servers in Symposium Call Center Server)—In this arrangement, you see a subtotal first for the filters, and then for each of the sites.
- Filters followed by element type—In this arrangement, you see a subtotal, first for the filters, and then for the element type.
- Sites followed by filters—In this arrangement (see the following diagram), you see a subtotal first for the network sites, and then for the filters.

The network total at the bottom of the display shows a summary of all the statistics in the display. The system calculates the network total differently for each of the two types of statistics shown in the displays:

- For *raw* statistics, such as the total number of calls answered, the network total is the sum of all filter group subtotals.
- For *calculated* statistics, such as the average answer delay, the network total is the amount reached after adding up all individual statistics in the column and applying the appropriate formula to the sum. The subtotal values in the column are not used in this calculation.



Consolidated Agent Position Status Count

Network Summary | Export | Print | Close

Site Name	Filter	Skillset	In Srv	Wait	Not Ready	DN	ACD-DN	NACD-DN	SS Call	Ntwk SS Call	Other SS Call
Toronto			**12**	**4**	**8**	**9**	**5**	**5**	**10**	**6**	**2**
	Sales		**9**	**3**	**6**	**6**	**2**	**5**	**8**	**5**	**1**
		Default_Skillset	5	1	4	3	1	0	2	2	1
		skill1	2	1	1	1	0	3	5	2	0
		skill2	2	1	1	2	1	2	1	1	0
	Marketing		**2**	**1**	**1**	**3**	**2**	**0**	**2**	**0**	**0**
	Customer_Svce		**1**	**0**	**1**	**0**	**1**	**0**	**0**	**1**	**1**
		Default_Skillset	1	0	1	0	1	0	0	1	1
Vancouver			**20**	**8**	**11**	**19**	**10**	**10**	**16**	**9**	**9**
	Sales		**14**	**4**	**9**	**9**	**3**	**7**	**9**	**6**	**6**
		Default_Skillset	3	0	3	1	2	0	5	0	3
		skill1	5	3	1	3	0	4	2	1	2
		skill2	6	1	5	5	1	3	2	5	1
	Service		**6**	**4**	**2**	**10**	**7**	**3**	**7**	**3**	**3**
		NSk1	2	1	1	2	5	2	3	1	3
		NSk2	4	3	1	8	2	1	4	2	0
Montreal			**10**	**6**	**4**	**5**	**2**	**4**	**11**	**7**	**3**
	Service		**10**	**6**	**4**	**5**	**2**	**4**	**11**	**7**	**3**
		NSk1	4	1	3	4	2	1	8	2	2
		NSk2	6	5	1	1	0	3	3	5	1
Ntwk Total			**42**	**18**	**23**	**33**	**17**	**19**	**37**	**22**	**14**

Interval to Date, refreshing every 5 seconds

Information as of 6/8/00 11:18:28 AM

Multi-page displays

Introduction

A real-time display that contains large amounts of data can be cumbersome to view. Symposium Web Client makes it easier to view large displays. Whenever a real-time display contains more than 30 data elements, the system breaks it down into a multi-page display, with each page containing a maximum of 30 lines of data.

When you launch a display with a large amount of data, a row of numbered links appears at the bottom of the display, with each link representing a page in the series. To view each page, click the numbered links, or use the **Next** and **Prev** (Previous) links. This feature enables you to flip from one page to the next without having to scroll through many lines of data.

Example

You launch the Standard Agent Display for the Toronto site, a call center with over 200 configured agents. In the resulting display, a numbered bar appears at the bottom of the display, indicating how many consecutive pages there are for you to view. Click any of the numbers to move from one page to another, or use the **Prev** and **Next** links.

Note: When you sort the columns in a multi-page display, you sort the column across the series of pages, not just on the individual page.

The following graphic shows an example of one page in a series containing 10 pages:

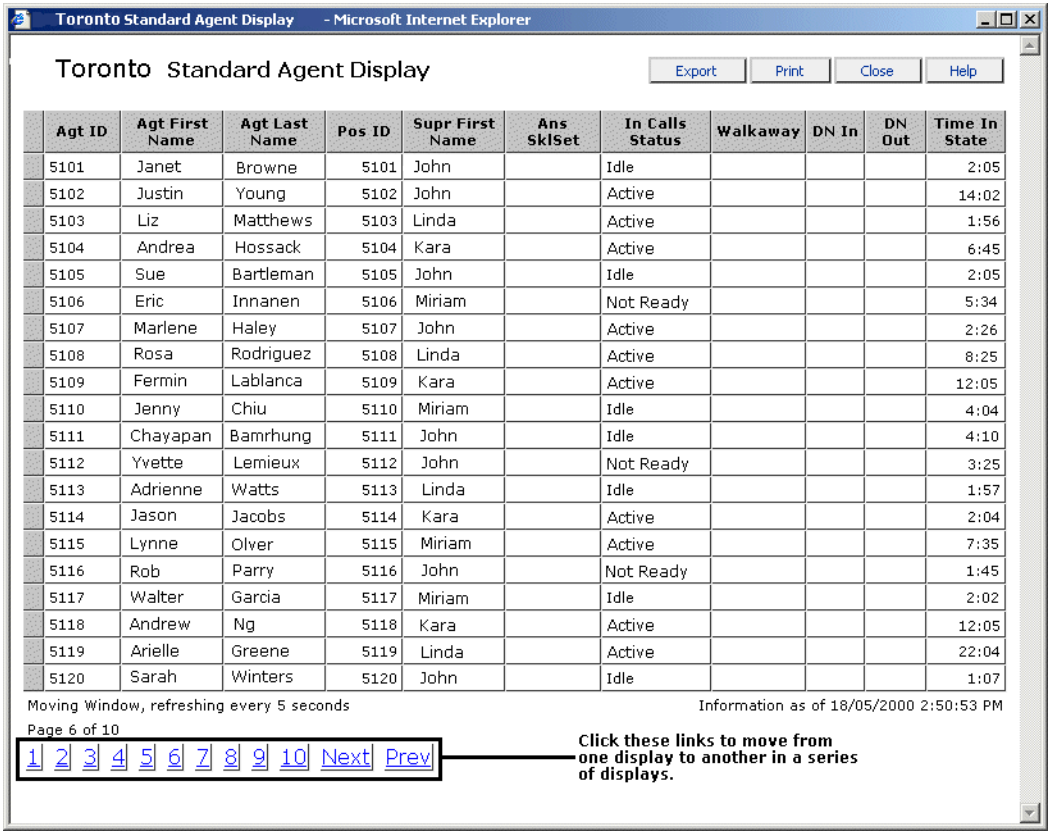


Chart displays

Introduction

There are two types of chart displays that you can launch in Symposium Web Client: summary charts, and chart graphical displays that you configure and store in your Graphical Displays folder.

Summary charts

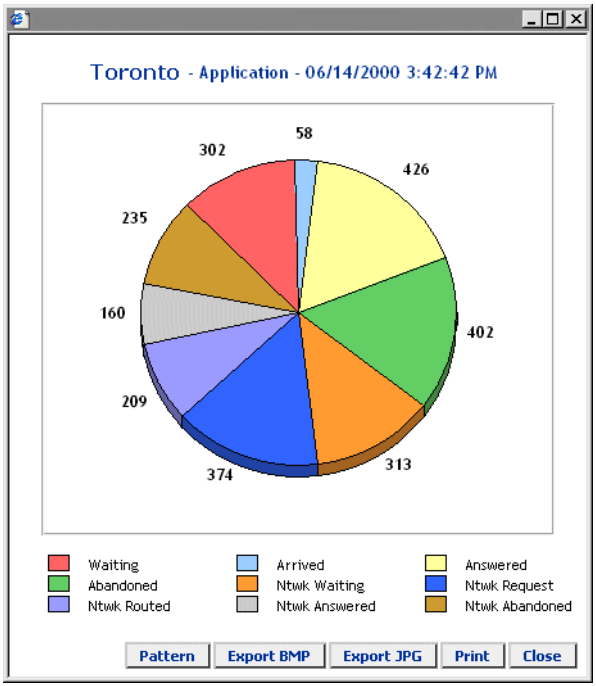
You can launch summary charts only from the grid displays. This type of chart summarizes the statistics shown in the grid display from which you launch them, in either bar chart or pie chart format.

- You can launch a *site* summary chart either from the site summary button in nodal grid displays, or by clicking the site name in a network-consolidated display.
- You can launch a *network* summary chart only by clicking **Network Summary** in a network-consolidated grid display.

Site summary charts

Site summary charts show a summary of the call activity at one site (one Symposium Call Center Server) in the network. You can launch these charts in either pie chart or bar chart format, and you can change the chart fill (either black and white pattern or color) by clicking **Pattern** or **Color** on the chart.

The following example shows a pie chart site summary for the Toronto site that was launched from the application display:



Network summary charts

Network summary charts show a summary of the statistics for all sites in the network in vertical stacked bar chart format only. These charts report the total value for each statistic in the network and do not take your filter settings into account. The statistics values for each site in the network are indicated by a separate color, or a different black and white pattern.

The following example shows a network summary chart launched from the Network Consolidated Skillset display:

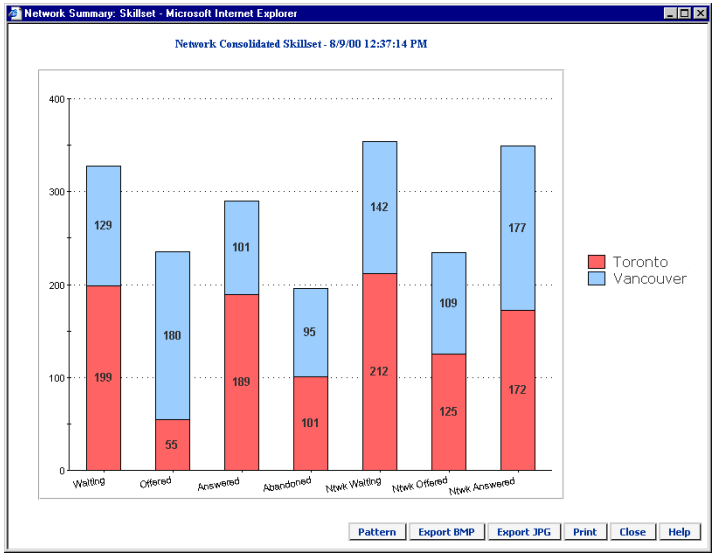


Chart graphical displays

You can configure and store private chart displays in your Graphical displays folder on the system tree under the server of your choice. These charts differ from the summary charts in that only you, the creator of the chart, can access them and change their properties.

Chart properties

You can create application, IVR, and skillset chart displays. When you create these custom displays, you can specify

- the statistics of your choice
- whether you want to see the chart in color or black and white
- the path for exporting a snapshot of the chart. For information about exporting, see “Exporting real-time displays” on page 142.
- the data collection mode (either moving window or interval-to-date)

Additional properties for application and skillset charts

In addition to the above properties, when you create your customized application and skillset chart graphical displays, you can choose

- multiple statistics per skillset or application (for example, the Calls Waiting, Calls Answered, and Calls Abandoned statistics for the French_Sales skillset)
- multiple statistics viewed for a summary of all the applications or skillsets within your partition on the selected server (for example, Calls Waiting, Calls Answered, and Calls Abandoned for all skillsets in your partition on the server), or across all servers in the network
- multiple skillsets or applications per statistic (for example, the number of Calls Waiting for each of the French_Sales, English_Sales, and Spanish_Sales skillsets). This type of chart is available only for nodal displays.

Note: For summary chart skillset displays, the total for statistics such as Agents Staffed, Agents Active, Agents Not Ready, or Agents Idle is shown as *0* since one agent is typically assigned to more than one skillset, which makes these totals misleading.

Additional properties for IVR charts

When you create your customized IVR chart graphical displays, you can choose

- multiple statistics for a summary of all IVR queues on the selected server

Chart formats

You can specify the following chart formats:

- **Nodal chart displays** You can choose from horizontal or vertical bar chart or pie chart format.
- **Network-consolidated chart displays** You can choose from horizontal or vertical stacked bar, or horizontal or vertical line plot format.

For a summary of all the chart formats for each element type, see the following table:

Element type	Chart options (nodal)	Chart options (network consolidated)
Agent Position Count	N/A	■ Choose statistics per summary (for example, view the Agents Idle, Agents Not Ready, and Agents Active for a summary of all skillsets in your partition across all servers).
Application	■ Choose statistics per application (for example, view the Calls Answered, Calls Waiting, and Calls Abandoned statistics for the Master_Script application, or for a summary of all applications in your partition on the selected server). ■ Choose applications per statistic (for example, view the Calls Answered for the Sales, Marketing, and Support applications).	■ Choose statistics per summary (for example, view the Calls Answered, Calls Waiting, and Calls Abandoned statistics for a summary of all applications in your partition across all servers).

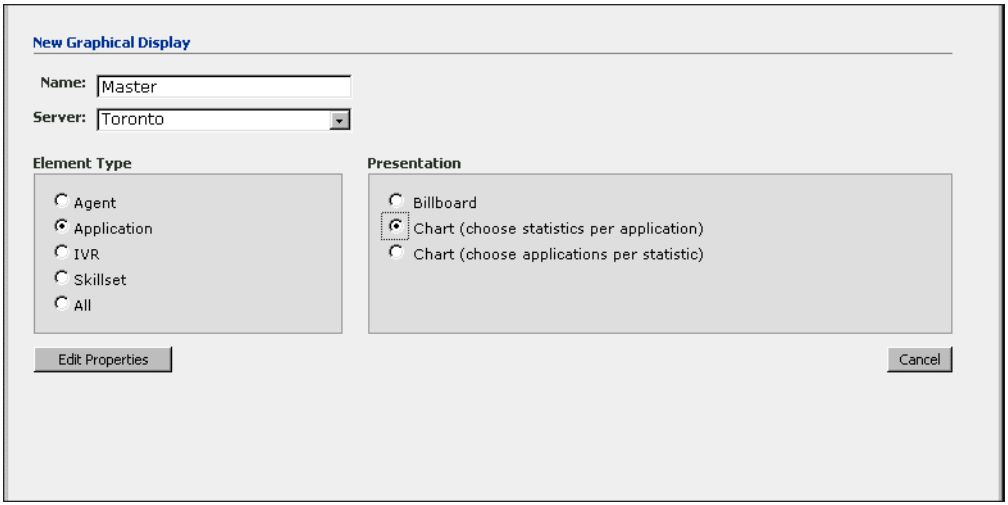
Element type	Chart options (nodal)	Chart options (network consolidated)
IVR	■ Choose statistics for IVR summary (for example, view the Calls Answered, Calls Waiting, and Calls Abandoned statistics for a summary of all IVR queues on the selected server). **Note**: You cannot select a particular IVR queue; you can view only a summary of IVR queues on a particular server.	N/A
Skillset	■ Choose statistics per skillset (for example, view the Calls Answered, Calls Waiting, and Calls Abandoned statistics for the French_Sales skillset, or for a summary of all skillsets in your partition on the selected server). ■ Choose skillsets per statistic (for example, view the Calls Answered for the Sales, Marketing, and Support skillsets).	■ Choose statistics per summary (for example, view the Calls Answered, Calls Waiting, and Calls Abandoned statistics for a summary of all skillsets in your partition across all servers).

Example

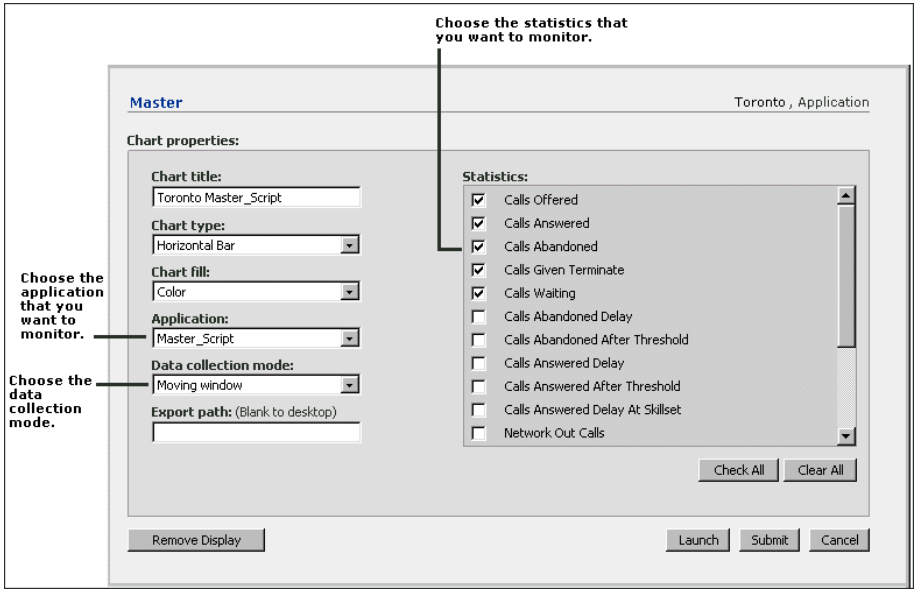
You want to create a nodal application chart display that shows the real-time data for the Master_Script application on the Toronto server. You want to monitor the following statistics:

- Calls Offered
- Calls Answered
- Calls Abandoned
- Calls Given Terminate
- Calls Waiting

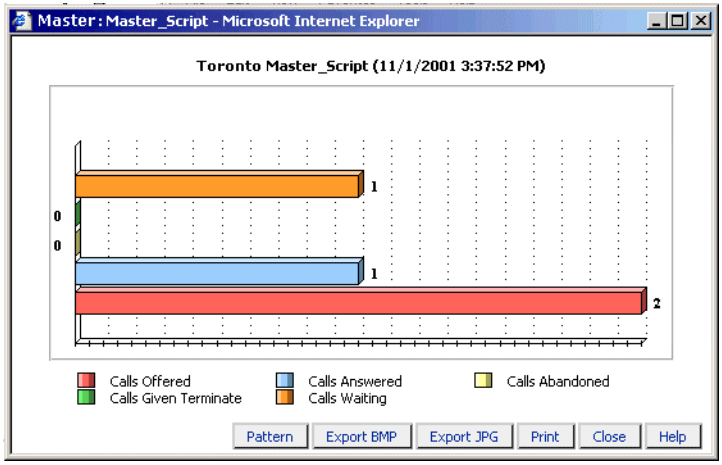
When you open the New Graphical Display window, you type the name of the new display, choose the Toronto server, the Application element type, and the statistics per application chart type.



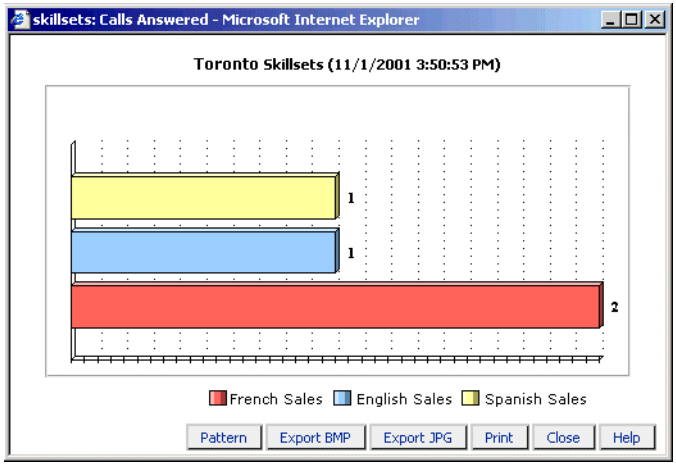
Click **Edit Properties** to open the Chart Properties window, in which you can choose the application, select the statistics, type the title of the new graphical display, and choose the data collection mode.



When you are finished customizing the display, you must click **Submit** to save your changes. Then click **Launch** to start the new graphical display.

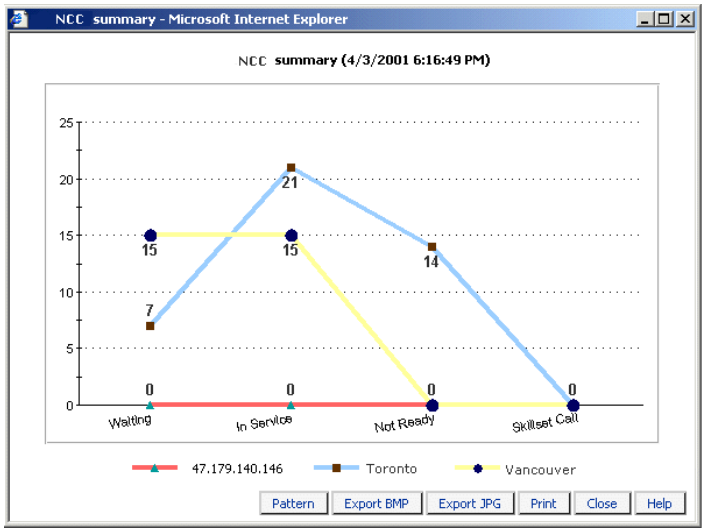


The following example shows a skillset chart display in which the statistic Calls Answered is monitored for the three skillsets, French Sales, English Sales, and Spanish Sales:



Note: For summary chart skillset displays, the total for statistics such as Agents Staffed, Agents Active, Agents Not Ready, or Agents Idle is shown as *0* since one agent is typically assigned to more than one skillset, which makes these totals misleading.

The following example shows a network-consolidated chart display in line plot format:



Graphical displays

Introduction

In addition to chart graphical displays, you can also create the following types of graphical displays in Real-Time Reporting:

- agent maps
- billboards
- collections

Agent maps

Agent maps are graphical displays that use blocks or rectangular icons to represent agents in the call center. Each block contains details about the agent, such as the agent's name, login ID, time in state, and current agent state.

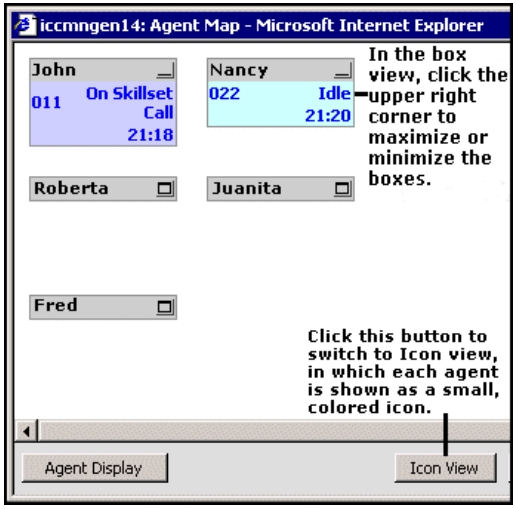
Note: Before you can create and launch an agent map, you must assign either a filter containing agents or a supervisor/reporting agent combination to the display. For more information, see "Agent maps and filters" on page 138.

There are two different views of agent maps:

- box view
- icon view

When you first launch an agent map, it defaults to the box view. In this view, all agent blocks are initially minimized, but you can still see the agent details in a small pop-up window by hovering your cursor over each block. Click the square icon in the upper right corner of each box to maximize the box and see the agent's details. The box background color represents the agent state, while the text color—if other than black—represents a threshold level (the box must be maximized to see the text).

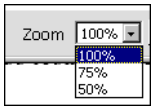
Box view



Zoom option

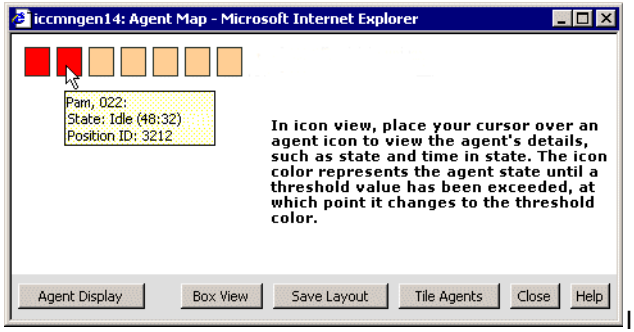
In box view, a zoom option enables you to resize agent map displays to 75 percent and 50 percent of their normal size. The resizing option does not apply to agent maps when they are shown in icon view. When you resize an agent map, the text within the agent blocks is also resized, and the relative position of the icons is maintained. If you resize an agent map to 50 percent of its normal size, then the spacing between the agent map icons is halved. To resize the agent map, click the appropriate size from the Zoom drop-down list.

Zoom drop-down list



Click **Icon View** to switch to icon view, in which each agent is represented by a small icon that changes color according to the agent's state and whether a threshold value is exceeded.

Icon view



You can choose the colors for the threshold alerts, specify the way you want the agent name and login ID to appear in the icon header, and specify if you want the agent map to pop to the front when a threshold level is exceeded.

Note: When an agent map pops to the front, it only pops to the front of the browser session from which you launched it. Agent maps do not pop in front of other browser sessions, or other open applications on your desktop.

Agent state colors

When you configure an agent map, you can choose the colors for each of the following agent states:

- logout
- undefined
- busy
- idle
- not ready
- on skillset call
- on DN in call
- on DN out call

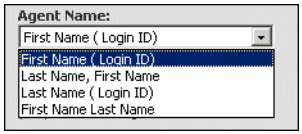
When an agent's activity changes, the background color in the agent's block changes accordingly.

Agent icon header format

When you configure agent maps, you can also specify which of the following combinations to display in the icon header:

- agent first name, followed by last name
- agent last name, followed by first name
- agent first name and login ID
- agent last name and login ID

The following graphic shows the drop-down list in the Agent Map Properties window from which you can choose the icon header format:



Threshold alerts

There are also threshold alerts for agent maps when the statistic values exceed the threshold values set by the administrator. You can choose a color for statistics that exceed the level 1 threshold value, and another color for statistics that exceed the level 2 value. When the threshold values are exceeded, the *text* in the maximized agent blocks (in box view), or the agent icon (in icon view), changes color accordingly.

Note: In box view, you must maximize the agent blocks to see the text change color when a threshold is reached; the text in the title bar of minimized agent blocks does not change color.

Agent maps and filters

Before you can create and launch an agent map, you must assign either a filter containing agents or a supervisor/reporting agent combination to the display. To assign a filter containing agents, you must configure it on the selected server. You can assign agent filters to agent maps to show only a subset of the agents to which you have access (the agents included in the partition assigned to you). For example, you can create filters to correspond to different departments in the call center.

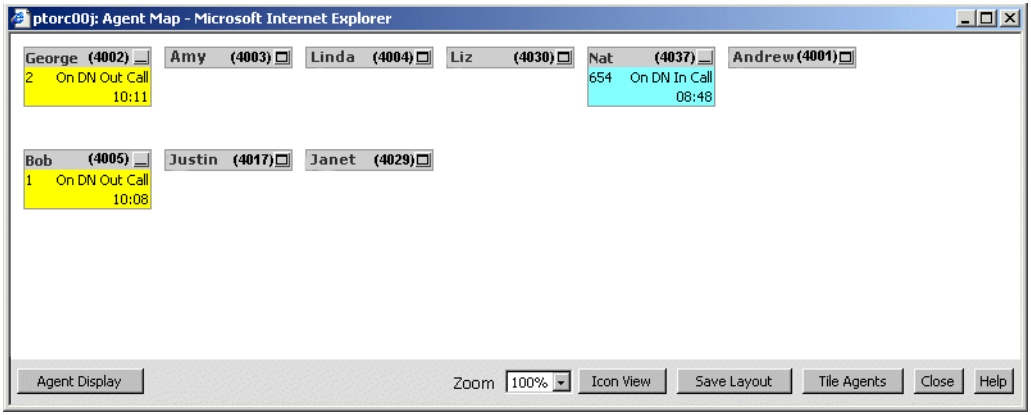
Alternatively, if your administrator has assigned a supervisor/reporting agent combination to you, then you can assign this combination to the agent map display to view all your reporting agents. You can assign either a filter containing agents or a supervisor/reporting agent combination: you cannot assign both simultaneously.

Customizing the agent map layout

You can move the agent blocks around in the agent map to represent the seating plan at the call center site. You can also resize the agent map by clicking and dragging its border to the desired size. After you arrange the agent icons, click **Save Layout** to save your configuration.

Finally, you can launch the corresponding nodal agent real-time display grid by clicking **Agent Display** at the bottom of the agent map.

Note: You cannot configure agent maps on the Network Control Center server.



For step-by-step procedures on creating and configuring agent maps, see the online Help included with Real-Time Reporting.

Billboards

When you configure a billboard, you can choose one statistic that you want to monitor closely, such as the number of calls waiting, and one skillset or application (out of all skillsets and applications in your partition). Alternatively, instead of selecting one skillset or application, select Summary to view a

summary of all IVR queues on the selected server, or a summary of the statistics for all applications or skillsets in your partition on the selected server (for nodal graphical displays), or across all servers in the network (for network-consolidated graphical displays). For example, you can monitor the number of calls waiting for the Sales skillset. When you launch the billboard, the statistic appears as a large, colored number that updates at the default refresh rate of 5 seconds.

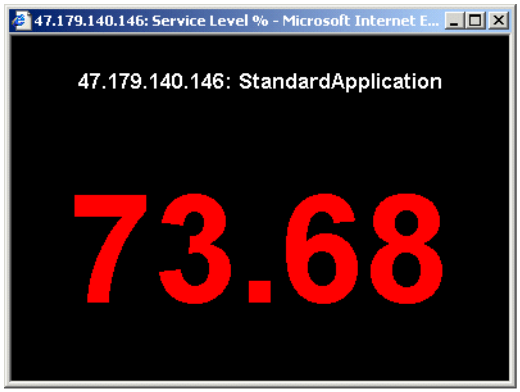
You can configure billboards only for the nodal Skillset, Application, and IVR displays, and for all three network-consolidated displays. When you double-click the billboard, the corresponding real-time display grid appears.

You can specify the billboard title, select the statistic that you want to monitor, choose the font color for viewing the statistic, and the colors for the threshold levels. The background color of billboard displays is black until a threshold value is exceeded, at which time it changes to the color you have specified for the threshold level, and the font changes to black. You can also specify if you want the billboard to pop to the front when a threshold level is exceeded.

Notes:

- When a billboard pops to front, it only pops to the front of the browser session from which you launched it. Billboards do not pop in front of other browser sessions, or other open applications on your desktop.
- When you create Skillset billboards and you select statistics such as Agents Staffed, Agents Active, Agents Not Ready, or Agents Idle, the total for this type of statistic across multiple skillsets can be misleading since agents are typically assigned to more than one skillset. Therefore, when you select any of these statistics and you choose the Summary option, the system notifies you that the statistic is not available when you launch the billboard.

The following example shows a billboard displaying the Service Level % statistic for the Standard Application Display:



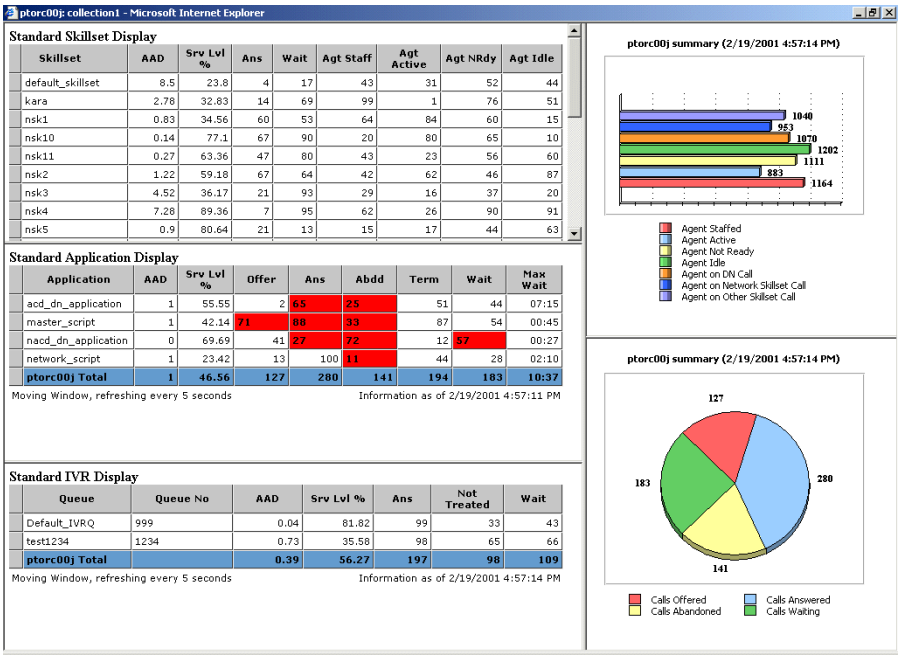
For step-by-step procedures on creating and configuring billboards, see the online Help included with Real-Time Reporting.

Collections

A collection is a grouping of real-time displays shown in the same window. The advantage of using collections is that you can monitor different displays and different types of statistics at the same time.

When you configure a collection, you can specify a maximum of three real-time display grids for the left side of the collection, and three chart or billboard graphical displays for the right side. Each display in the collection behaves according to its own settings and properties.

Note: You can choose from only those private real-time display grids and graphical displays that exist on the server on which you are configuring the collection. Therefore, you must configure the graphical displays on the server before you can include them in your collection.



Exporting real-time displays

In Real-Time Reporting, you can save snapshots of real-time displays for future reference by exporting them to the application server, to a network computer, or to your computer. The export location depends on the type of display that you export.

- You can export snapshots of real-time display *grids* only to the application server.
- You can export snapshots of summary charts and chart graphical displays to a location that you specify on a network computer or on your computer. If you do not specify a custom location for exporting chart displays, the system automatically exports them to your desktop.

Exporting real-time display grids

When you view a real-time display grid, you can click **Export** to export a snapshot of the grid display to the application server.

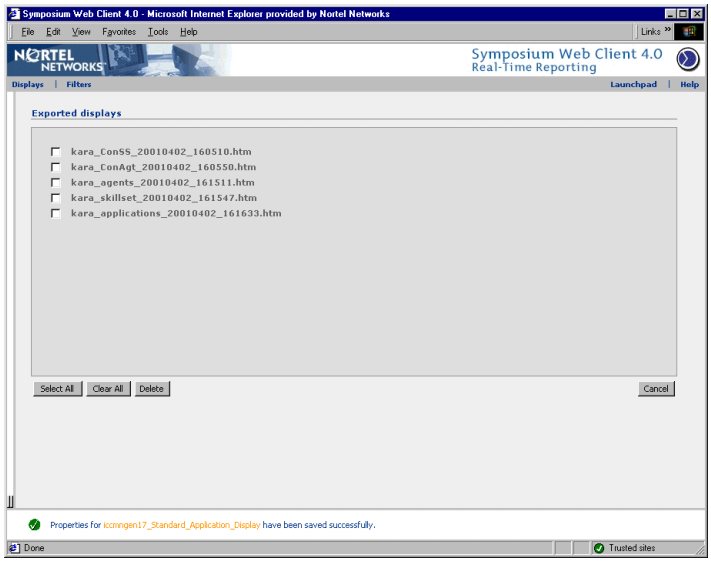
The system saves the grid as an HTML file with the file name *userid_prefix_date_time*.htm.

- The *userid* is your application server user ID.
- The *prefix* is a title that you can give the display when you customize its properties (for more information, see “Configuring private display properties” on page 109). If you do not specify a custom prefix, the system provides a default prefix.
- The *date_time* is the timestamp when you export the display.

Example

Your user ID is Kara, and you specify a grid export prefix for the Skillset display of *Skillset.* You export the Skillset grid display to the application server on May 23, 2001 at 12:45:28 p.m. The system saves the file with the name *kara_Skillset_20010523_124528.htm.*

To access real-time display grid files that you have exported to the application server, you can use the Exported Displays window in Real-Time Reporting. This window enables you to view all files that you have exported, and delete the files that you no longer want to keep. To view an exported file, click the file name. The file opens in a separate browser window.



Exporting summary charts

When you view a site summary or network summary chart, you can click **Export BMP** or **Export JPG** to export a snapshot of the chart to the location that you specified when you customized the corresponding private real-time display. You can choose to export the snapshot as a bitmap graphic with a .bmp extension, or a JPEG graphic with a .jpg extension. For information on customizing your displays, see “Configuring private display properties” on page 109.

The system saves the *network* summary charts with the file name *DisplayType_date_time*.[file extension].

- The *DisplayType* is either *Ntwk_Skillset*, *Ntwk_Application*, or *Ntwk_Agent PositionCount*, depending on the display from which you launched the summary chart.
- The *date_time* is the timestamp when you export the chart.
- The file extension is either .jpg or .bmp.

The system saves the *site* summary charts with the file name *DisplayType_sitename_date_time*.[file extension].

- The *DisplayType* is either *StandardSkillset*, *StandardApplication*, *StandardAgent*, *StandardNodal*, *StandardIVR*, or *StandardRoute*, depending on the display from which you launch the summary chart.
- The *sitename* is the name of the Symposium Call Center Server from which the display is launched.
- The *date_time* is the timestamp when you export the chart.
- The file extension is either .jpg or .bmp.

Example

You export the Network Consolidated Agent Position Status Count network summary chart as a .bmp file on June 29, 2000 at 2:23 p.m. The exported file name is *Ntwk_AgentPositionCount_20000629_142307.bmp*.

To access summary charts that you have exported, navigate to the location that you specified while customizing the corresponding network-consolidated or nodal real-time display. If you did not specify an export path, the file is located on your desktop.

Section A: Real-time statistics

Overview

Introduction

The Symposium Call Center Server can collect the following types of real-time statistics:

- agent
- application
- IVR (M1/Succession 1000/M1 IE switch only)
- nodal call count
- route
- skillset

For a detailed description of the statistics shown in each real-time display, see the online Help included with Real-Time Reporting.

Data collection interval

Symposium Web Client and Symposium Call Center Server offer two data collection intervals:

Type	Description
moving window	■ Symposium Call Center Server reports the last 10 minutes of activity.
interval-to-date	■ The start time for statistics collection is user-configurable. ■ Statistics are accumulated for intervals from 15 minutes to 24 hours (incremented by 15 minutes). ■ Data collection is reset to 0 at the start of every interval.

Types of calls

Introduction

This section details the following types of calls: Symposium Call Center Server calls, ACD calls, NACD calls, and DN calls. The system tracks calls and presents the corresponding statistics differently according to the type of call. For detailed descriptions of the types of real-time statistics shown in the Real-Time Reporting displays, see the online Help included with the application.

Symposium Call Center Server calls

Symposium Call Center Server calls are calls that

- arrive at a CDN that is acquired by Symposium Call Center Server
- are presented to the Incalls key of a phoneset that is acquired by Symposium Call Center Server

Local Symposium Call Center Server calls arrive at a CDN configured as a local CDN; network Symposium Call Center Server calls arrive at a CDN configured as a network CDN (that is, incoming calls), or calls that are offered to a remote site by the local server (that is, outgoing calls).

Note: Unless otherwise specified, Symposium Call Center Server calls include both local and network calls.

Tracking

Symposium Call Center Server calls are tracked from the time that a call notification message arrives from the switch until the call is

- abandoned
- routed to the default DN
- given Force Disconnect command
- given Busy treatment
- given Overflow treatment
- given Queue to NACD treatment

- given Queue to Network Skillset treatment, and then
  - abandoned
  - answered
  - reaches a non-ISDN trunk
  - treated by the Network script at the remote site
- released
- transferred or conferenced out by an agent or resource

ACD calls

ACD calls are calls to an Automatic Call Distribution Directory Number (ACD-DN) that are presented to a phoneset that is acquired by Symposium Call Center Server. ACD calls are distributed to agents in an ACD group based on the routing table defined on the switch.

Notes:

- Networking statistics only contain calls controlled by the server. They do not include ACD calls.
- On the DMS/MSL-100 switch, ACD call statistics include NACD calls.

Tracking

For ACD calls, the server does not record information about call activity on the switch. ACD calls are tracked from the time they are answered at a phoneset acquired by Symposium Call Center Server. Therefore, the server does not record the following statistics for ACD calls:

- calls offered
- calls waiting
- calls abandoned (and abandon delay)
- calls returned to queue

NACD calls

NACD calls arrive at the server via a network ACD-DN and are presented to a phoneset acquired by Symposium Call Center Server.

Notes:

- Delay and abandon statistics are not available for NACD calls.
- On the DMS/MSL-100 switch, Symposium Call Center Server cannot distinguish between ACD and NACD calls. NACD calls are pegged as ACD calls.

Tracking

For NACD calls, the server does not record information about call activity on the switch. NACD calls are tracked from the time they are answered at a phoneset acquired by Symposium Call Center Server. Therefore, the server does not record the following statistics for NACD calls:

- calls offered
- calls waiting
- calls abandoned (and abandon delay)
- calls returned to queue

DN calls

DN calls are presented to the DN key of a phoneset that is acquired by Symposium Call Center Server. They are usually personal calls. The server only pegs DN calls in the agent performance statistics. Activity code and application statistics do not include DN calls.

Tracking

DN calls are tracked from the time they are answered at a phoneset acquired by Symposium Call Center Server. The server does not track activity for calls automatically redirected by the switch, including

- Hunting
- Call Forward—Busy
- Call Forward—All Calls
- Call Forward—No Answer

Note: For the DMS/MSL-100 switch, only one DN key can be configured in the Phoneset Properties sheet and monitored by Symposium Call Center Server. Activity on other DN keys is not reported.

Types of real-time statistics

Introduction

The following section outlines the types of real-time statistics available in Symposium Web Client. For a complete listing of the real-time statistics and their definitions, see the *Symposium Call Center Server Supervisor's Guide* for Release 3.0.

Agent statistics

Agent statistics provide information pertaining to a Symposium Call Center Server agent. The data fields are pegged based on agent activities. These statistics allow a supervisor to monitor an agent's current state in the real-time displays.

The following three cumulative agent statistics are available only in Symposium Web Client, and only if you are connected to a Release 4.2 Symposium Call Center Server (or later). They are not available if you are connected to a Release 4.0 Symposium Call Center Server.

Skillset Calls Answered

Description: The total number of skillset calls answered by agents at this site.

Type: Cumulative/Total

Note: This total does not include the number of ACD or NACD calls answered by agents.

Directory Number In Calls Answered

Description: The total number of DN calls answered by agents at this site.

Type: Cumulative/Total

Directory Number Out Calls Made

Description: The total number of outbound DN calls made by agents at this site.

Type: Cumulative/Total

Data collection option

Your administrator can enable moving window or interval-to-date data collection for the agent statistics group.

Pegging thresholds

Your administrator can define agent threshold classes with different threshold values for settings such as On Hold and Reserve. Therefore, the value for On Hold and Reserve can vary from one agent to another. For more information about threshold classes, refer to the *Symposium Call Center Server Administrator's Guide.*

Application statistics

Application statistics provide performance data on a per-application basis. The statistics provide a means to monitor an application's contribution to the operation of a call center.

Script

A script is defined as a set of instructions that relate to a particular type of call, caller, or set of conditions, such as time of day or day of week.

Note: The Network_Script is not supported on the DMS/MSL-100 switch.

Application

An application is a logical entity that represents a script for reporting purposes. The Master script and each script that it references (that is, each primary script) has an application with the same name as the script name.

Note: The Network_Script application and the NACD-DN application are not applicable to the DMS/MSL-100 switch.

Pegging

When a call enters Symposium Call Center Server, it is handled by the Master script. Most calls are handed off by the Master script to a primary script. The primary script can hand off the call to a secondary script.

Calls handled by a Master script

If the call does not leave the Master script, all time delays and events (such as call treatments) are pegged against the Master_Script application.

Calls handled by a primary script

If a call is handed off to a primary script, all events occurring up to the hand-off are pegged against the Master_Script application. Events that occur after hand-off are pegged against the primary application.

Calls handled by a secondary script

If a call is handed off to a secondary script, all delays and events are pegged against the primary application.

Note: If a script is referenced by both the Master script and a primary or secondary script, calls passing through the script are pegged against the Master script.

Call traffic records

In real-time network call statistics, each site keeps records for all incoming and outgoing traffic taking place between applications at the local site and applications at the remote site.

Non-ISDN trunks and call information

If a call encounters a non-ISDN trunk while being networked to another Symposium Call Center Server site, the call information that normally travels with the call does not reach the destination site. This means that the destination site cannot distinguish that the call came from the Symposium Call Center Server network. The destination site treats the networked call as a new call. The source site treats the network call as terminated.

Data collection option

Your administrator can enable moving window or interval-to-date data collection for the application statistics group.

Pegging thresholds

Your administrator can define application threshold classes with different threshold values for settings such as Calls Abandoned and Calls Answered After Threshold. Therefore, the value for Calls Abandoned and Calls Answered After Threshold can vary from one application to another. For more information about threshold classes, refer to the *Symposium Call Center Server Administrator's Guide.*

IVR statistics

Interactive Voice Response (IVR) statistics, which apply only to the M1/ Succession 1000/M1 IE switch, provide performance measurement information on a per-IVR queue basis. These statistics provide a means to monitor the usage of the port resources of an IVR queue from a real-time perspective.

Restrictions

IVR statistics may not be available if a third-party IVR application is used instead of a Meridian Mail application.

Data collection option

Your administrator can enable or disable moving window or interval-to-date data collection for the agent statistics group.

Pegging thresholds

Your administrator can define IVR threshold classes with different threshold values for settings such as Calls Answered and Calls Answered Delay. Therefore, the value for Calls Answered and Calls Answered Delay can vary from one IVR ACD-DN to another. For more information about threshold classes, refer to the *Symposium Call Center Server Administrator's Guide.*

Nodal statistics

Nodal statistics provide accounting information on a per-site basis. These statistics provide a means to monitor the nodal performance of call handling from a real-time perspective.

Note: Network-related statistics are not available in DMS/MSL-100 nodal statistics.

Data collection option

For call center summary statistics, your administrator can enable but not disable moving window; your administrator can enable or disable interval-to-date data collection.

Pegging thresholds

Your administrator can define a nodal threshold class with different threshold values for settings such as Calls Answered and Network In Calls Answered. For more information about threshold classes, refer to the *Symposium Call Center Server Administrator's Guide.*

Route statistics

Route statistics apply only to the M1/Succession 1000/M1 IE switch. Route statistics provide all trunks busy (ATB) information on a per-route basis.

Data collection option

Your administrator can enable or disable moving window or interval-to-date data collection for the route statistics group.

Pegging thresholds

Your administrator can define route threshold classes with different threshold values for settings such as All Trunks Busy Time and Short Call. Therefore, the value for All Trunks Busy Time and Short Call can vary from one route to another. For more information about threshold classes, refer to the *Symposium Call Center Server Administrator's Guide.*

Skillset statistics

Skillset statistics provide performance information based on a per-skillset basis. These statistics provide a means to monitor the real-time performance of active skillsets that your call center offers to incoming calls.

Pegging thresholds

Your administrator can define skillset threshold classes with different values for the service level threshold and the length (talk time) of a short call. Therefore, the value for service level and short call length can vary from one skillset to another. For more information about threshold classes, refer to the *Symposium Call Center Server Administrator's Guide.*

Data collection option

For skillset statistics, your administrator can enable or disable interval-to-date data collection. Your administrator can enable but not disable moving window data collection.

Real-time agent status

This section shows how the agent state is reported on real-time displays.

If the agent key status is		Agent status displays as			
Incalls key	**DN key**	**Incalls Status**	**DN In Status**	**DN Out Status**	**Walk-away Status**
no call present	no call present	Idle			
no call present	incoming DN call active	Busy	Active		
no call present	incoming DN call on hold	Busy	On hold		
no call present	outgoing DN call active	Busy	Active		
no call present	outgoing DN call on hold	Busy	On hold		
no call present	incoming DN call ringing	Idle			
no call present	DN key pressed	Busy			
call ringing	no call present	Call present			
call ringing	incoming DN call ringing	Call present			
call active	no call present	Active			
call on hold	no call present	On hold			
call active	incoming DN call on hold	Active	On Hold		

If the agent key status is		Agent status displays as			
Incalls key	**DN key**	**Incalls Status**	**DN In Status**	**DN Out Status**	**Walk-away Status**
call on hold	incoming DN call active	On hold	Active		
call on hold	incoming DN call on hold	On hold	On hold		
call active	outgoing DN call on hold	Active		On hold	
call on hold	outgoing DN call active	On hold		Active	
call on hold	outgoing DN call on hold	On hold		On hold	
ACD/NACD call ringing	no call present	Busy			
ACD/NACD call active	no call present	ACD/ NACD Active			
ACD/NACD call on hold	no call present	ACD/ NACD on hold			
Not ready	no call present	Not ready			
Not ready	Incoming DN call active	Not ready	Active		
Not ready	Incoming DN call on hold	Not ready	On hold		
Not ready	Outgoing DN call active	Not ready		Active	

If the agent key status is		Agent status displays as			
Incalls key	**DN key**	**Incalls Status**	**DN In Status**	**DN Out Status**	**Walk-away Status**
Not ready	Outgoing DN call on hold	Not ready		On hold	
Call on hold; walkaway	no call present	On hold			Yes

Section B: Network-consolidated real-time displays

In this section

Overview

Network-consolidated displays enable you to view consolidated real-time data across a network of call centers.

In a call center network, each call center site is represented by a server in Symposium Call Center Server. The Network Control Center (NCC) server acts as the central administration point for all servers in Symposium Call Center Server in the network, keeping track of which sites belong to your network, and the site names.

When you want to launch a network-consolidated real-time display in Symposium Web Client, you must click to log on to the NCC server on the system tree. The network-consolidated display that you launch contains statistics for each site that the NCC server recognizes as being part of the network.

Symposium Web Client includes the following three new network-consolidated real-time displays:

- Consolidated Agent Position Status Count display
- Consolidated Skillset Display
- Consolidated Application Display

Unlike the nodal real-time displays included with Real-Time Reporting, you cannot add custom formulas or new statistics columns to the network consolidated real-time displays. However, you can rename, rearrange, and delete the columns when you save copies of the standard public network-consolidated displays in your Private displays folder. Threshold alerts also apply to the network-consolidated real-time displays, but you cannot choose custom colors for them. Instead, statistics in the displays that exceed the level 1 threshold value appear in yellow, while those that exceed the level 2 value appear in red.

This section lists the fields included in each of the standard public displays. For detailed descriptions of the fields, see the online Help included with the application.

Consolidated Agent Position Status Count display

Introduction

In this display, you can view details on the number of agents across the network who are in service, waiting to receive calls, or not ready to receive calls, as well as statistics on the number and type of skillset and DN calls that the agents are handling.

ATTENTION

On the DMS/MSL-100 switch, agents cannot press the Emergency key while they are in conference with another agent.

Column descriptions

The standard Consolidated Agent Position Status Count real-time display contains the following columns:

- Site name
- Skillset name
- Agents waiting
- Agents in service
- Agents not ready
- Agents on skillset calls
- Agents on network skillset calls
- Agents on other skillset calls
- Agents on DN calls
- Agents on ACD-DN calls
- Agents on NACD-DN calls

Consolidated Skillset Display

Introduction

In this display, you can view the number of local and incoming network calls that are handled by each skillset defined in all call centers across a network. For example, you can see the number of calls handled in each call center by agents with the Marketing skillset.

Column descriptions

The standard Consolidated Skillset Display contains the following columns:

- Site Name
- Skillset Name
- Total Calls Waiting
- Total Calls Offered
- Total Calls Answered
- Total Calls Abandoned
- Total Calls Average Answer Delay (The average answer delay for all calls answered by agents with this skillset. Formula: *Total Calls Answered Delay / Total Calls Answered*)
- Service Level Percentage (The service level percentage calculated for this skillset based on the number of CDN and networking calls answered and abandoned. Formula: (*1- (Total Calls Answered After Threshold + Total Calls Abandoned After Threshold) / (Total Calls Answered + Total Calls Abandoned)) * 100*)
- Network In Calls Waiting
- Network In Calls Offered
- Network In Calls Answered
- Maximum Waiting Time
- Longest Waiting Time Since Last Call

Consolidated Application Display

Introduction

In this display, you can view the number of local and incoming network calls that are handled by each application within all call centers across a network. For example, you can see the number of calls handled in each call center by the Marketing application.

Column descriptions

The standard Consolidated Application Display contains the following columns:

- Site Name
- Application Name
- Total Calls Waiting
- Total Calls Arrived
- Total Calls Answered
- Total Calls Abandoned
- Average Answer Delay (Formula: *Total Calls Answered Delay / Total Calls Answered*)
- Service Level Percentage (The value is calculated for this application based on the number of CDN and networking calls answered and abandoned. Formula: (*1- (Total Calls Answered After Threshold + Total Calls Abandoned After Threshold) / (Total Calls Answered + Total Calls Abandoned)) * 100*)
- Network Out Calls Waiting
- Network Out Calls Requested
- Network Out Calls Routed
- Network Out Calls Answered
- Network Out Calls Abandoned
- Network Average Answer Delay (The average answer delay for all calls networked out from this application and answered at remote sites. Formula: *Network Out Calls Answer Delay / Network Out Calls Answered)*

Chapter 4

Agent Desktop Displays

In this chapter

About Symposium Agent Desktop Displays

Agent Desktop Displays is a Windows-based tool that provides skillset monitoring to Symposium Call Center Server agents. Agents or supervisors can log on to Agent Desktop Displays using their phoneset logon ID and view statistics for each skillset to which they belong.

Note: Before you or any of your agents can use the Agent Desktop Displays, your administrator must install and configure the software on the application server and on each client PC that is used to access the displays. You must also have the Real-Time Reporting component installed and configured on the application server for Agent Desktop Displays to function properly.

Display formats

There are two types of display formats that users can view:

- **tabular displays** Agent Desktop Displays' tabular format appears as a window with several columns. This window can be moved, minimized, resized, closed, or set to always stay on top of the desktop like any standard Microsoft window.
- **one-line displays** In the one-line display, you can view the summary real-time statistics for each skillset to which you currently have access. Every 5 seconds, a new skillset and its associated statistics appear in the one-line display. The skillsets continuously change, enabling you to view all of your skillset statistics one skillset at a time. To see the full name of each statistic, pause your cursor over each of the statistics headings. A box appears, listing the full statistic name.

To switch between the one-line display and the tabular display, right-click the window and select the display type of your choice from the pop-up menu. You can also choose the language for the statistic names and menu items shown in the display. For more information about using the Agent Desktop Displays, right-click in the display and select **Help** from the resulting pop-up menu.

Real-time statistics column descriptions

Introduction

Each skillset shown in Symposium Agent Desktop Displays can display any one of the statistics listed below on the client PC.

Statistic	Display name	Description
Calls waiting	CALLS WAIT	The number of local and incoming network CDN calls that are currently waiting to be answered by agents in each skillset to which you are currently logged on. **Note:** A call is counted more than once if it is queued to more than one of the skillsets to which you are logged on.
Total calls answered	CALLS ANS	The number of local and incoming network CDN calls answered by agents for the currently selected skillset.
Total calls answered delay	ANS DELAY	The average amount of time in seconds that all local and incoming network CDN calls had to wait before being answered by an agent with this skillset. Waiting time is measured from the time at which the calls entered the queue to the time when agents answered the calls.

Statistic	Display name	Description
Maximum waiting time	MAX WAIT	The amount of time in seconds that the oldest local or incoming network CDN call had to wait to be answered by agents in the currently selected skillset.
Calls answered after threshold	ANS THRESH	The number of local and incoming network CDN calls that were answered after a delay greater than or equal to the service level threshold for this skillset.
Network calls waiting	NTWK WAIT	The number of incoming network calls that are currently waiting to be answered by an agent in this skillset.
Network calls answered	NTWK ANS	The number of incoming network calls answered by agents in the current skillset.
Agents available	AVAIL AGENTS	The number of available agents in this skillset who are logged on and in Wait state.
Agents in service	INSRV AGENTS	The number of agents assigned to this skillset who are logged on. **Note:** Agents are counted more than once if they are logged on to more than one of the skillsets that you can view.
Agents not ready	NOTRDY AGENTS	The number of agents who are logged on for this skillset and whose state is Not Ready.

Statistic	Display name	Description
Agents on skillset call	SKLSET CALL	The number of agents who are currently on a call that was queued to this skillset.
Agents on network skillset call	NTWK SKLSET	The number of agents assigned to the current skillset who are answering incoming network skillset calls.
Agents on other skillset call	OTHER SKLSET	The number of agents assigned to the current skillset who are active on calls for other skillsets. **Note:** Agents can be assigned to multiple skillsets. Other skillsets can be local skillsets designed specifically for call handling at your location, or network skillsets that can be assigned from any site.
Agents on DN call	DN CALL	The number of agents logged on for this skillset who are currently handling DN calls.
Agents on ACDDN call	ACDDN CALL	The number of agents assigned to this skillset who are currently handling ACD-DN calls.
Agents on NACDDN call	NACDDN CALL	The number of agents assigned to the current skillset who are answering networked ACD-DN calls.
Expected wait time	EXPECT WAIT	The time that a new local or incoming network CDN call is expected to wait before being answered by an agent with this skillset.

Statistic	Display name	Description
Longest waiting time since last call	LWT LASTCL	The longest waiting time of all idle agents who are currently waiting to answer calls for this skillset. The time is calculated since the agent's last call. The timer for idle time is reset to 0 (zero) when an agent answers a call.
Longest waiting time since login	LWT LOGIN	The longest waiting time of all idle agents who are currently waiting to answer calls for this skillset. The time is calculated since the agent logged on. The timer begins logging wait time when an agent logs on to the current skillset and resets to 0 (zero) when the agent answers a call.
Skillset state	SKLSET STATE	The current state of this skillset. Values: ■ INSVC = In Service ■ OUTSVC = Out of Service
Agents unavailable	UNAVAL AGENTS	The number of logged on agents who are currently unavailable to take calls.

Display thresholds

All display thresholds have two values—the low end (Level 1) and the high end (Level 2) of the normal range of activity. Your administrator can define these values in the Configuration component of Symposium Web Client.

In the Symposium Agent Desktop Displays application, your administrator can use colors (red, yellow, and green) to identify whether the value of the statistic shown in the display is less than the low value, between the low and high value, or greater than the high value. The administrator must configure these threshold

colors on the Agent Desktop Displays server component on the application server. For more information on configuring the Agent Desktop Displays, see the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*, or consult the Symposium Agent Desktop Displays online Help.

Note: If your administrator does not set the threshold levels for the statistic in the Configuration component, then the statistic values appear in white in the Symposium Agent Desktop Displays.

Chapter 5

Historical Reporting

In this chapter

Overview

Introduction

Reports help you monitor your system performance by providing information on system activity. You can use reports to

- analyze productivity and efficiency
- assess staffing requirements
- identify trends
- identify seasonal behavior
- forecast future activity
- enhance service

Forecasting is especially helpful for predicting changes in call center traffic. For example, if a retailer's annual summer sale traditionally brings higher call volumes, detailed reports can help the call center prepare for future sales. Similarly, tracking seasonal business trends makes it easier to manage staffing requirements from one year to the next.

Working with reports

Creating reports

When you customize one of the standard public report templates included with Symposium Web Client, you create a user-defined report. When you create a user-defined report, you specify

- general report information—including the report name
- selection criteria—the entities to be included in the report (for all reports you can choose from the filter elements that are applicable for the type of report; for network-consolidated reports, you can also choose from among the filter sets that you have saved [if any])
- report schedule—when the report is to be generated
- data range—the data collection period for the report
- output options—the printer or file to which the report is output

Working in Historical Reporting

Introduction

The Historical Reporting component enables you to produce nodal and network-consolidated reports detailing the past performance of the call center. As with the Symposium Call Center Server client, in Symposium Web Client, you can specify the data range of the reports, schedule them to run at a specific time, and apply selection criteria to them.

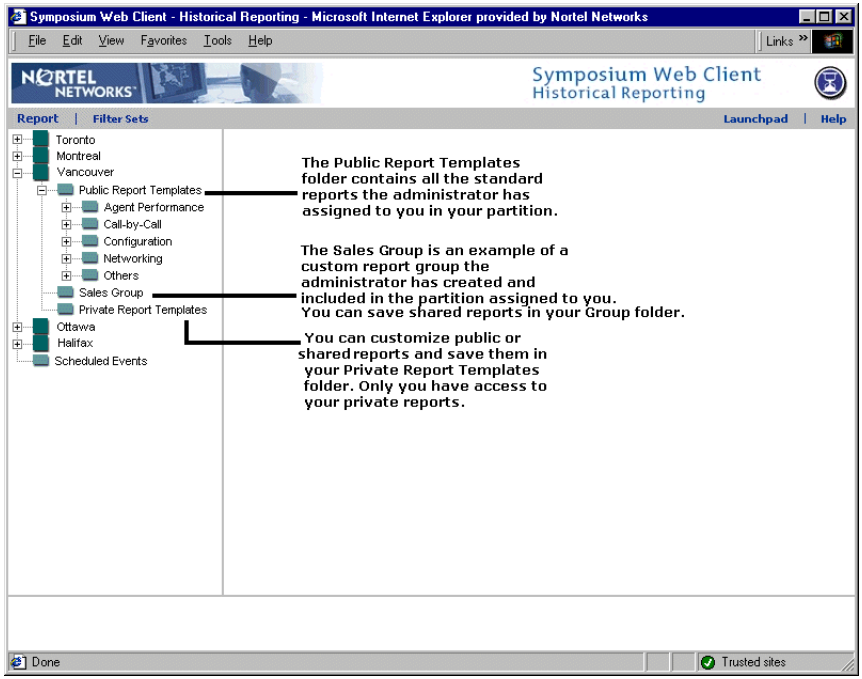
Note: The combined number of ad hoc or scheduled reports that you can generate simultaneously is limited to five. You can schedule as many historical reports as required; however, only five scheduled reports are processed simultaneously while the others wait in queue. Likewise, for ad hoc reports, only five reports can be generated at the same time.

For example, five supervisors can generate an ad hoc report, but the sixth supervisor to do so receives a message saying the system could not process the request. This supervisor must try to generate the ad hoc report again later, after the first five reports have been generated (or schedule the report to run later).

This limitation applies to the *total* of the ad hoc and scheduled reports that can be generated at a particular time. For example, if two reports are scheduled to be output at noon, then only three ad hoc reports can be generated at this time, bringing the total to five.

Public, private, and shared reports

Historical Reporting contains up to three main folders where reports are stored under each server on the system tree: the Public Report Templates folder, the Group folder, and the Private Report Templates folder.



Public Report Templates folder

The Public Report Templates folder includes all the standard report templates shipped with Symposium Web Client. The templates are stored in subfolders, each corresponding to a public report group listed in the Access and Partition Management component of Symposium Web Client. Your administrator can restrict your access to public report templates by including only a portion of the public report groups in the partition assigned to you. Your administrator can give you access to a maximum of six subfolders (public report groups):

- Agent Performance
- Call-by-Call
- Configuration
- Others
- Networking (only for M1/Succession 1000/M1 IE networking)
- NCC (only on the NCC server)

Note: The current release of the Succession 1000 switch only supports networking over ISDN trunks.

If your administrator does *not* assign a partition to you, then you can see *all* public report groups by default. However, once your administrator assigns a partition to you, then you are limited to viewing *only* the public report groups included in your partition. Therefore, your partition must include at least one of the public report groups before you can see and access the corresponding public report templates. If you do not see a public report templates folder that you require, contact your administrator and request that the corresponding report group be added to the partition assigned to you.

You can run the public reports on an ad hoc basis, or you can save copies of them in your Private or Group folders.

Group folder

The Group folder enables you to store shared reports. The Group folder name corresponds to a custom report group. Your administrator can create custom report groups in Access and Partition Management and include the custom groups in the partition assigned to you. Only users who have been assigned a partition containing a specific custom report group can access that specific Group folder in Historical Reporting.

Note: When your administrator adds the custom report group to a partition, the partition must be configured on the same server under which he or she created the report group. If the partition is not configured on the same server, the report group is not visible in Symposium Web Client.

Group folders enable Historical Reporting users who belong to the same group to share their customized reports. You can customize a standard public report template and save it in your Group folder so that other members of your group can use the same customized report. Members of your group can open your customized report and run it on an ad hoc basis, but they cannot modify it. Only the creator of the report can modify or delete it. Group members can save a copy of it under a different name in the Group folder, or in their Private Report Templates folder, and then modify the report, if desired.

Administrators can create custom report groups to reflect each department in your call center, such as the Sales Group or the Marketing Group. They can also create group folders for each company sharing a bureau call center. In this scenario, the customized reports for each company are kept in separate folders, which can only be accessed by members belonging to the group.

Report groups also enable administrators to give a user access to a very limited number of reports. For example, if an administrator does not want to give a user access to any of the standard report templates, he or she can create a custom report group and add it to the partition assigned to the user. When the user opens Historical Reporting, he or she sees only the custom report group folder and can only see reports that other members of the group have saved in the Group folder.

Private Report Templates folder

When you customize a public or a shared report, you can save it in your Private Report Templates folder if you do not want to share your report with other users. Only you, the creator of the report, can access the report when it is in your Private Report Templates folder. If you want to share a private report with members of your group, you can save a copy of it in your Group folder.

Historical Reporting and the application server

Symposium Web Client includes the same standard report templates that were available on the Symposium Call Center Server client. However, instead of being installed on the client computer, the report templates in Symposium Web Client are installed on the application server, and are available to all users who have reporting access.

When you customize reports and save them, you save them on the application server. Centralized storage greatly reduces the amount of space required on the client workstations to run Historical Reporting.

Scheduled reports are generated using the report scheduler on the application server, making it unnecessary to have a client workstation that is on and running the report listener at all times. Since the application server is always on and receiving data from Symposium Call Center Server, the client no longer has to be connected to Symposium Call Center Server to generate a scheduled report.

Historical data and partitions

When your administrator gives you access to use Historical Reporting, he or she also determines the agents, applications, skillsets, CDNs, DNISs, and report groups that you can see in your reports by creating a partition containing these elements and assigning the partition to you. This is particularly useful in a bureau call center shared by several companies. Administrators can create separate partitions for each company and assign them to the appropriate supervisors, thereby restricting the supervisors' view of the call center. In this way, you see only the data pertaining to your company.

Partitions contain elements that are server-specific. Therefore, if you work in a networked environment and have access to more than one server on the system tree, your administrator must create a partition that spans all servers to which you have access (or separate partitions for each server to which you have access). If you can see data on one server on the system tree, but you see nothing on another server, contact your administrator and request that he or she grant you access to the data on both servers.

Note: If the administrator does not assign a partition to you on any server, then you can see *all* call center data, and all public report templates on all servers to which you have access.

Historical data and supervisor/reporting agent combinations

In addition to assigning you a partition, your administrator can assign one or more supervisor/reporting agent combinations to your Web Client user profile on a per-server basis. These combinations appear as the supervisor's name on the Supervisors tab in Access and Partition Management. Each name shown represents the supervisor and *all* of his or her reporting agents. When your administrator clicks a supervisor's name, therefore, he or she links all the supervisor's reporting agents to your Web Client user profile, enabling you to automatically see all the agents in your historical reports.

Your administrator can assign to you the combination containing all your agents, or a combination containing the agents of another supervisor, or both. He or she can also assign specific agents to you by including them in the partition assigned to you.

All agents in the supervisor/reporting agent combinations and the partitions assigned to you appear in the Available table when you choose a report for which the Agent Name filter or Agent ID filter is applicable (for example, the Agent Performance report). When you run reports ad hoc, or when you customize and save reports, you can choose the agents who you want to see in the report when you define the selection criteria. For information on defining the selection criteria, see the following section.

Note: Supervisor/reporting agent combinations only restrict you to viewing your reporting agents in Historical Reporting when used in conjunction with partitions. If your administrator does not assign a partition to you, but only assigns a supervisor/reporting agent combination, then you see all agents on all servers to which you have access. On the other hand, if your administrator assigns to you a partition containing the agents, applications, skillsets, CDNs, DNISs, and report groups that you need to see, in addition to a supervisor/reporting agent combination, then you can see only those agents in the partition and supervisor/reporting agent combination (in addition to the applications, skillsets, CDNs, DNISs, and report groups).

Selection criteria and filter elements

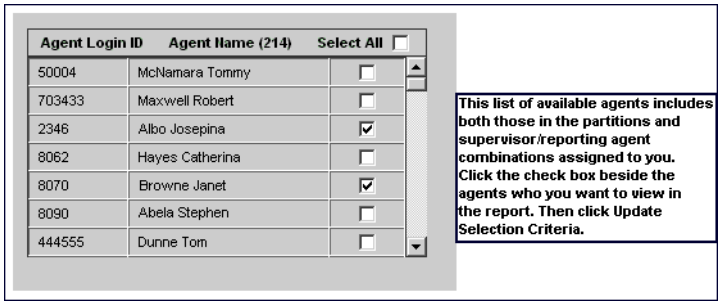
When you run an ad hoc public report, or when you create a customized report, you can choose the filter elements (the data) that you want to see in the report by defining the selection criteria. You can choose from all elements that the administrator has put in the partition assigned to you, or from the agents included in the supervisor/reporting agent combinations assigned to you.

The filter elements available (for example, agents, skillsets, or applications) depend on the type of statistics included in the report. For example, the Agent Performance report may contain two types of filter elements: Agent Name and Agent Login ID. In this case, both filter elements are listed in one table in the Available section. If you do not select any filter elements, then all data appears in the report.

Note: If you select multiple filter elements, then only those that satisfy all filter criteria appear in the report. For example, if you choose to report on five agents and three activity codes, if one agent has not used any of the activity codes, then that agent is not included in the report.

Supervisor/reporting agent combinations and partitions

When you define the selection criteria for a report containing agents (for example, the Agent Performance report), both the agents in the supervisor/reporting agent combinations and in the partitions assigned to you appear in the Available table, as shown in the graphic below:



You can choose *individual* agents to view in your historical reports; you cannot choose an entire supervisor/reporting agent combination by clicking the supervisor's name, as you can on the Filters tab in Real-Time Reporting.

Note: Unlike agent partitions, which your administrator must manually update when a new agent is assigned to you, supervisor/reporting agent combinations are dynamic: if a new agent is assigned to you, then the agent is automatically included in the corresponding supervisor/reporting agent combination. This means that in Historical Reporting, when you select a report containing agents, the table of available agents always lists the most current agents from the supervisor/agent combinations assigned to you.

However, if you customize and *save* a historical report, the selection criteria in your saved report is not automatically updated, meaning that you may have access to more agents by the time you run the report. It is always a good idea, therefore, to check the agents shown in the Available table before running your customized report to see if you want to add any new agents that have been assigned to you.

Filter sets

The filter sets feature enables you to select the sites and resources to be included in a network-consolidated report. After you create and save a filter set, you can apply it to both standard and private network-consolidated historical reports to view only the information that you specify in the generated report. When you connect to a Network Control Center server and open a network-consolidated report, the Selection Criteria area includes a list of the available network sites, and any available filter sets that you have defined and saved.

Note: You can also use filter sets that your administrator has imported from the Symposium Call Center Server classic client. While each of the classic client filter sets contains only one type of data—either skillsets, applications, route numbers, route names, DNIS numbers, or DNIS names—you can add different types of data to these filter sets after they are imported into Symposium Web Client by using the filter sets tabs in Historical Reporting.

Creating filter sets

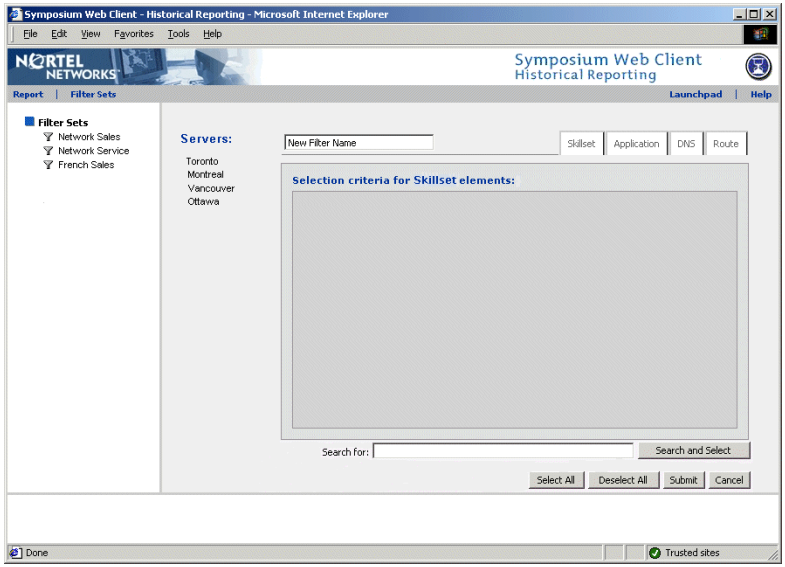
When you create a filter set, you can specify the applications, DNISs, routes, and skillsets that you want to see in both standard and private network-consolidated historical reports. You can choose from among those items included in the partition assigned to you. You can select multiple resource items across multiple sites in your network and save them in one filter set.

Note: A user with administrator privileges must assign a partition to you before you can configure filter sets. If there are no skillsets, applications, DNISs, or routes from which to choose when you create the filter set, then you do not have a partition assigned to you, and you must contact your call center administrator.

To create a filter set

1 To open the Filter Sets window, on the main menu, click Filter Sets → Manage Filter Sets.

2 To open the tabs in which you choose the items to include in your filter set, click Filter Sets → Add Filter Set.



3 In the box, type the new filter set name, and then click the first server under which you want to choose filter set elements. The server's elements appear in the applicable tabs.

Note: The elements that you can view and select are those included in the partitions assigned to you. If you do not see an element that you want to include in the filter set, contact your administrator and request that it be added to your partition.

4 On the first server, select all elements that you want to include in the filter set, and then proceed with the next server that you want to include, again choosing the elements that you want to save in the filter set.

5 When you have chosen all elements across all applicable servers, click **Submit** to save the filter set.

Result: The next time you log on to the NCC server and open a network-consolidated report, click the **Filter Sets** heading in the Selection Criteria area. The filter set name appears in the filter sets table.

6 To apply the filter set to the report, click the check box beside the filter set name, and then click **Update Selection Criteria** before generating the report ad hoc, or scheduling it.

Note: While you can apply more than one filter set to a report, the combined total number of filter elements in all filter sets that you apply to a single report cannot exceed 250. For example, you can apply one filter set that includes 150 skillsets, and another filter set that includes 100 agents to a single network-consolidated report because the total number of filter elements is 250.

For more detailed procedures on filter sets, see the online Help included with the application.

Types of reports

Introduction

The reports in Historical Reporting can be classified in two ways:

- who created them
- what type of information they contain

Who created the reports

Public report templates

Public report templates are the standard reports installed with Symposium Web Client. You cannot schedule public report templates, but you can run them on an ad hoc basis. You can modify the report data range and add selection criteria when you generate the report. All other report information is fixed.

User-defined

You create a user-defined report by using a public report template or another user-defined report and saving a copy of it in your Private Report Templates folder, or in your Group folder (if you have access to a group folder). You can schedule user-defined reports, define selection criteria, and modify any report information (except predefined database information).

User-created

A user-created report is a customized report created with Crystal Reports 9.0 or later. You can import user-created reports one at a time into Symposium Web Client using the Template Importing Wizard. You can access this wizard from the Report menu in Historical Reporting.

To import reports, follow the prompts in the wizard. When you import a report template, it is stored on the application server. However, you access the report template by opening your Private Report Templates folder under the same server in Symposium Call Center Server to which you imported the report. To share the report template with other users, you must save your private report in your Group folder (if you have access to a group folder).

When you import a user-created report that is based on historical data (as opposed to configuration data), the Template Importing Wizard enables you to choose the type of data range for the report. For historical user-created reports, you can choose from all four data range types: interval, daily, weekly, and monthly. When you finish importing the report, click on the report in your Private Report Templates folder to further define the data range, schedule the report, and specify the output options.

Note: Unlike user-defined reports, you cannot change the data range type for user-created reports that you have imported with the Template Importing Wizard. Once you choose the type of data range and import the user-created report, the data range type remains the same. For example, if you imported the report with a daily data range, you cannot change it to weekly. However, you can choose from all the same daily data range options as you can with user-defined reports. To change the data range type for a user-created report, you must import the report again with the new data range type.

For more information about creating customized reports, refer to the *Historical Reporting and Data Dictionary.*

Note: You can also use the Template Importing Wizard to import existing, customized Symposium Call Center Server report templates, one at a time, into Symposium Web Client. For more information on using the wizard, see the online Help included with the application.

User-created parameter reports

You can also use the Template Importing Wizard to import into Symposium Web Client parameter reports that you have created with Crystal Reports. To do so, you must select the value **Parameters** from the **Report is based on the following data** drop-down list, and then follow the prompts in the wizard to import the report. A parameter report is a Crystal Reports template with special parameter fields that require the user to enter or select data at the time of running the report. Some examples of parameter fields that may require user input are the date and time.

Just like other user-created reports that you import, the default location for storing parameter reports is in your Private Report Templates folder. When you finish importing the report, click the report in your Private Report Templates folder under the same server in Symposium Call Center Server to which you imported the report, and then select the values for all parameters and run the

report. To share the report template with other users, you must save your private report in your Group folder (if you have access to a group folder).

Since parameter reports require user input at the time of running, you can only run these reports on an ad hoc basis; you cannot schedule parameter reports. You also cannot save the parameter values that you select when you run the report, or save the parameter report with its parameter values in your Group folder. Instead, each time you run the report, you must select the parameter values.

For more information, see “Working with parameter reports” on page 222.

What type of information the reports contain

Historical reports

Historical reports provide information about the past performance of the call center. Two types of historical reports are available:

- summarized historical reports—These reports contain totals accumulated over a period of time (usually 15-minute interval, day, week, or month).
- event (or detail) reports—These reports contain detailed information about each event that occurred.

Configuration reports

Configuration reports contain information about how your system is configured. You can use them as a reference when you are planning or making changes to your system.

Using reports to monitor your call center

Introduction

Symposium Web Client provides a large number of reports that you can use to monitor the efficiency of your call center over time. This section lists some common questions supervisors have, and tells you which report you can use to find answers.

Which agents need assistance and training?

As a call center supervisor, you must be able to identify agents with the following problems:

Problem	Report
Unusually long talk time—This may indicate that the agent is having difficulty responding to customer requests. (It may also indicate that the agent is handling more complex calls than other agents.)	Agent Average Calls Per Hour Agent Performance Agent Average Calls Per Hour, Bottom 5 (Use the Agent By Activity Code report to determine the complexity of the calls handled by the agent.)
Unusual number of short calls—This may indicate that the agent is terminating or redirecting calls to meet call quota targets.	Agent Short Calls Agent Performance Agent Average Calls Per Hour, Top 5
Unusual number of transferred or conferenced calls—This may indicate that the agent is having difficulty responding to customer requests, or is redirecting calls to meet call quota targets.	Agent Transferred/Conferenced Activity Agent Performance

Problem	Report
Unusually long talk time or unusual number of short, transferred, or conference calls for a specific skillset—This may indicate that the agent does not have the skills required for a skillset.	Agent By Skillset Performance (Compare the same agent in several skillsets, and different agents in the same skillset.)
Over- or under-utilized agents—Look for agents with unusual amounts of Waiting time, or unusual number of Calls Presented. (Take into account time spent on ACD calls.)	Agent Performance
Unusual amount of time spent on personal calls.	Agent DN Performance, Top 5 Agent DN Performance
Habitual lateness, long break times, excessive walkaway time.	Agent Login/Logout

Note: To balance call distribution, your call center administrator can reconfigure parameters such as Agent Idle Time Preference, adjust agent skillset priorities, or redesign the call flow (adding or changing scripts, adding or removing skillsets, and changing skillset assignments).

Do I have enough agents assigned to each skillset?

As a call center supervisor, you must be able to identify skillsets that are underserviced. To do so, use the Skillset Performance report. Look at the following statistics:

- Skillset Answered—Shows the call volume for the skillset. Skillsets with high call volumes probably need more agents. (You should take into account the average call length for the skillset.)
- Average Answer Delay—Shows how long, on average, callers waited in the skillset queue. Skillsets with long delays may need additional staffing.
- Skillset Answered After Thresh—Shows how many calls were answered after the service level threshold for the skillset. Compare this total with your department's targets. If it is too high, you may need additional staffing.

Section A: Managing reports

In this section

Overview of managing reports

A user-defined report is a report you create using a standard public report or another user-defined report as a template. You can define the following properties for a user-defined report:

- general report information—including report name
- selection criteria—the entities to be included in the report (if you are connected to an NCC server and are generating a network-consolidated report, then the selection criteria can include any filter sets that you have created and saved)
- report schedule—when the report is to be generated
- data range—the data collection period for the report
- output options—the printer or file to which the report is output, the e-mail addresses where notification is sent that the report generation was successful or not, and the paper size for the printed report
- network sites—(network option only) for network-consolidated reports, generated from the NCC, you can select the sites to be included in the report

Notes:

- You cannot define a data range for configuration reports.
- The administrator must configure a network printer on the application server before you can select it in the output options area and generate a scheduled report on it. For more information on configuring printers on the application server, see the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*.
- You must configure a default printer on the client PC to print ad hoc reports to this printer.
- The combined number of ad hoc or scheduled reports that you can generate simultaneously is limited to five. You can schedule as many historical reports as required; however, only five scheduled reports are processed simultaneously while the others wait in queue. Likewise, for ad hoc reports, only five reports can be generated at the same time. For example, five supervisors can generate an ad hoc report, but the sixth supervisor to do so

receives a message saying the system could not process the request. This supervisor must try to generate the ad hoc report again later, after the first five reports have been generated (or schedule the report to run later). This limitation applies to the *total* of the ad hoc and scheduled reports that can be generated at a particular time. For example, if two reports are scheduled to be output at noon, then only three ad hoc reports can be generated at this time, bringing the total to five.

Where reports are stored

Introduction

All reports are located on the application server. Therefore, when you create a user-defined report on one PC and then log on to the application server from another PC, you see your report in the reports folder under the server where you stored it.

User-defined reports and user ID

When you save a user-defined report in your Private Report Templates folder, your user ID is stored with it. Only the creator has access to the report. If another user logs on to Symposium Web Client on the PC from which you configured the report, he or she will not see the report in the Report Properties window.

User-defined reports and Symposium Call Center Server

When you save a user-defined report, you save it under a server in Symposium Call Center Server on the system tree. The name of the server is stored with the report. The report is available only when you log on to the server on which you created it. If you have access to more than one server, and you create a report on one server, that report will not appear in the Report Properties window when you log on to another server on the system tree, even if you log on using the same Web Client user ID.

Reports and time zones

When you run an ad hoc report, or when you schedule a report, you can select the time zone. The time zone that you select applies to both the data range of the report, and the report schedule.

Note: The system defaults to the time zone in which the selected server in Symposium Call Center Server or Network Control Center server is located.

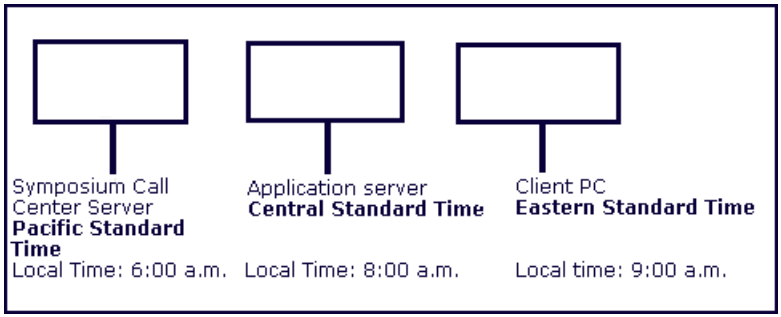
In a network of call centers, some sites in the network may be located in different time zones. To schedule and run reports effectively, ensure that you know the time zones in which the following two computers are located:

- **Symposium Call Center Server** When you choose the data range for either ad hoc or scheduled reports, the system converts the time that you select to Symposium Call Center Server time. The system automatically shows the selected Symposium Call Center Server time zone in the Time Zone drop-down list when you initially open a report.
- **application server** When you select the schedule time for your report, the system converts the time that you choose to the application server time.

Example

You are working in a networked environment. It is 9:00 a.m. in Toronto where you are located (Eastern Standard Time). The application server is located in Winnipeg (1 hour earlier, Central Standard Time). You connect to a server in Symposium Call Center Server located in Vancouver (3 hours earlier, Pacific Standard Time).

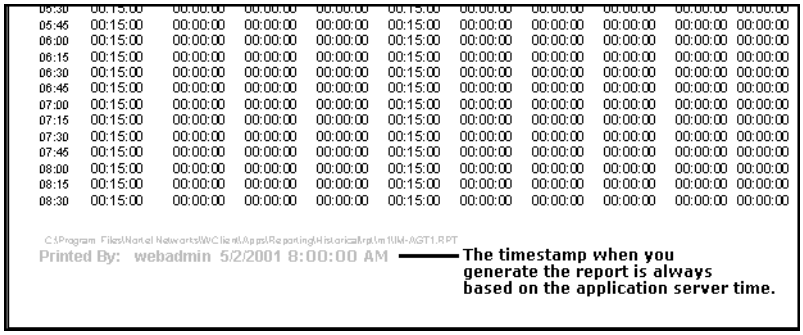
The following graphic provides an overview of the time zones involved in this example:



In this example, you choose your local time zone (Eastern Standard Time). You choose an interval data range of 12:00 a.m. until 8:45 a.m. from 1 day ago to 0 days ago. For more information on selecting the data range, see “To define the data range” on page 205.

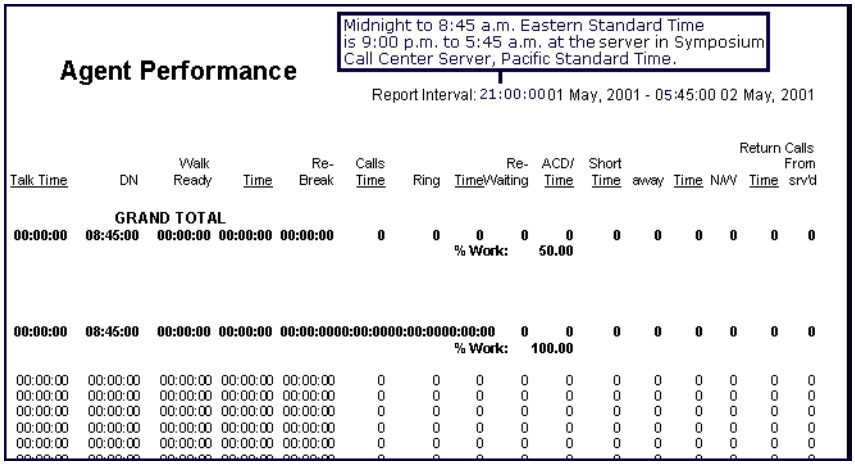
Then, you schedule the report to run every day at 9:00 a.m. For more information on scheduling reports, see “To define the report schedule” on page 215.

Result: The report is generated every day at 9:00 a.m. your time. However, because the schedule time is always based on the application server time, the timestamp at the bottom of the report shows the application server time of 8:00 a.m.



The system always translates the selected data range times to Symposium Call Center Server time, so in this case, the interval shown at the top of the report reflects Pacific Standard Time—9:00 p.m. to 5:45 a.m. (the same as 12:00 a.m. to 8:45 a.m. Eastern Standard Time).

The following graphic shows the report interval if you choose Eastern Standard Time before you define the data range:

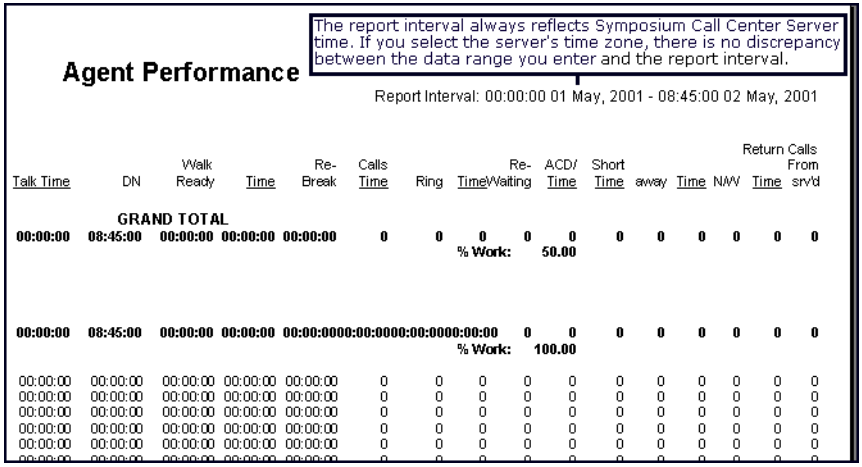


Since the interval at the top of the report always reflects the time zone in which the server in Symposium Call Center Server is located, if you leave the default time zone (which is always the same time zone as the selected server), you avoid a discrepancy between the data range that you specify and the report interval.

Therefore, in this example, if you leave the default time zone of Pacific Standard Time (the same time zone as the server in Symposium Call Center Server on which you want to run the report), the data range times that you choose are based on the selected time zone, *and* are synchronized with Symposium Call Center Server.

If you choose an interval data range of 12:00 a.m. until 8:45 a.m. from 1 day ago to 0 days ago, the interval shown at the top of the report is 12:00 a.m. until 8:45 a.m., Symposium Call Center Server time.

The following graphic shows the report interval if you choose the same time zone as the server in Symposium Call Center Server before you define the data range:



ATTENTION

The report schedule that you define cannot start in the p.m. range and end in the a.m. range. Therefore, when the system converts your selected time to application server time, an error message appears if the *converted* start time is in the p.m. range and the *converted* end time is in the a.m. range. In this case, you must reenter the schedule start and end times, taking into account the time difference with the application server.

Example

The application server is located in a time zone that is 2 hours later than the time zone you choose from the Time Zone drop-down list. You enter a schedule start time of 9:00 p.m. and an end time of 11:00 p.m. However, when you submit your schedule, the system converts the schedule start time to 11:00 p.m. and the schedule end time to 1:00 a.m., application server time. In this case, an error message appears because the schedule that you define cannot start in the p.m. range and end in the a.m. range. You must reenter the schedule start and end times, taking into account the time difference with the application server.

Creating user-defined reports

Introduction

Historical Reporting enables you to create, schedule, and run user-defined reports in one window. This section describes the main features of the Report Properties window in Historical Reporting. For step-by-step procedures, see the online Help included with the application.

CAUTION

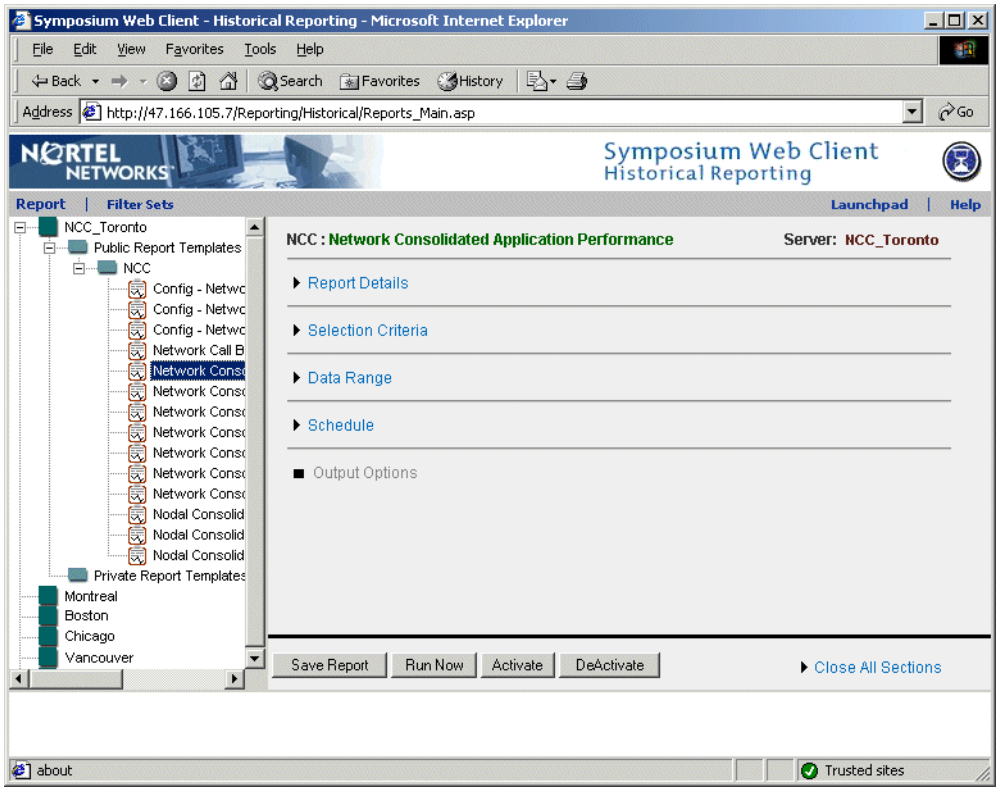
Risk of data loss

Before you define a consolidated report or generate a call-by-call report, check with your network administrator to make sure that the network has the capacity to support the resulting traffic.

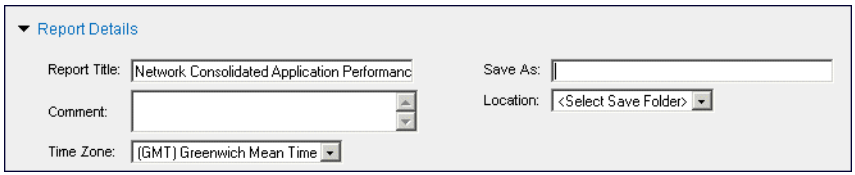
To create a user-defined report

To create a user-defined report, you can choose from three types of report templates as the basis for your report: a public report template, a shared report located in your Group folder, or a private report template.

1. On the system tree, in the Historical Reporting main window, click the server under which you want to create the report. The server expands to reveal a series of folders.
2. Double-click the folder containing the report template that you want to use as a basis for your user-defined report.
3. Click the report template. The Report Properties window appears. To view, add, and edit the report properties, click the appropriate heading in the window.



4 Click **Report Details**. The heading expands to reveal a series of boxes.



5 Type a new report title, or accept the default title shown. Use only alphanumeric characters and underscores in the report title. Do not use special characters, such as apostrophes (’), slashes (/ \), or ampersands (&) in the report title. The title appears at the top of the generated report,

and in the title bar of the Ad-Hoc Report viewer when you run the report ad hoc.

Note: If you save multiple copies of the same public report in your Group or Private report templates folders, change the report title to distinguish between reports when you generate them. If you do not change the report title, all copies of the same public report will have the same standard title when you generate the reports. Use only alphanumeric characters and underscores in the report title. Do not use special characters, such as apostrophes (’), slashes (/ \), or ampersands (&) in the report title.

6 To save your customized report, you must type a new report name in the Save As box. This is the name that appears on the system tree; it must be unique. Use only alphanumeric characters and underscores in the report name. Do not use special characters, such as apostrophes (’), slashes (/ \), or ampersands (&) in the report name.

Tip: If you save the report in your Group folder, type a descriptive name so that other members of your group can easily identify the report.

7 From the Location drop-down box, select the location where you want to save your report. You can choose from your private or group folders (if you have access to a group folder). If you save it in your private folder, only you have access to the report; if you save it in your group folder, other members of your group can access the report.

8 From the Time Zone drop-down list, select the time zone in which you want to run or schedule your report.

ATTENTION

The data range times that you specify for this report are based on the time zone that you choose here. The system defaults to the time zone in which the selected server in Symposium Call Center Server is located. If you choose a different time zone than that in which the server in Symposium Call Center Server is located, the system translates the data range times that you enter to Symposium Call Center Server time. Therefore, to reflect the data range most effectively, leave the default Symposium Call Center Server time zone before choosing the data range. For more information on time zones, see “Reports and time zones” on page 195.

9 To save space in this window, you can now close the Report Details section by clicking the heading. Continue with the following procedure to define the selection criteria.

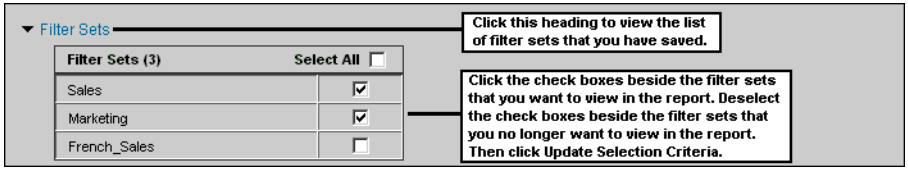
To define the selection criteria

You can select the elements that you want to include in your reports by choosing filters and assigning filter elements to your reports. For example, in an agent performance report, you can choose the agents that you want to report on. You can define the selection criteria for public, private, and shared reports that you schedule or run on an ad hoc basis.

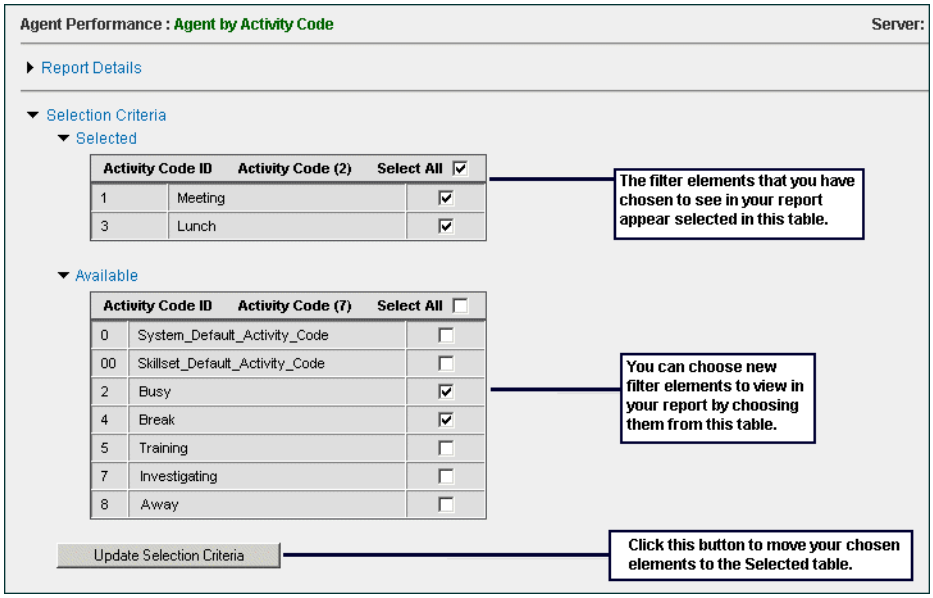
Note: If you do not select any filter elements, you see *all* available data in the report. If you select a filter element, you see *only* that element in the report. For example, you choose a skillset report and see a list of 20 skillsets in the Available filter elements table. If you do not select any skillsets, you see all 20 skillsets in the report, whereas if you select 3 skillsets, you see only these 3 skillsets in the report.

Selecting filter sets

If you are connected to an NCC server and are defining the selection criteria for a network-consolidated report, then you can also choose from among the filter sets that you have created and saved. After you create and save a filter set, you can apply it to both standard and private network-consolidated historical reports that you schedule or run on an ad hoc basis. For more information on creating filter sets, see “Creating filter sets” on page 182.



The following graphic shows the Selection Criteria area for the Agent by Activity Code report:



1 In the Report Properties window, click **Selection Criteria**. The heading expands to reveal a table of selected filter elements (if any), and a heading that you can expand to show the available filter elements (those that you have not yet chosen for this report).

Notes:

- The filters available depend on the type of statistics included in the report. If you are using a standard public report as a template, then see the report description in the *Symposium Call Center Server Historical Reporting and Data Dictionary* for a list of filters.
- If you select multiple filter elements, only those that satisfy all filter criteria appear in the report. For example, if you choose to report on five agents and three activity codes, if one agent has not used any of the activity codes, then that agent is not included in the report.
- For network-consolidated reports generated on the NCC, the filter elements available are the network sites that you want to include in the report, or any filter sets that you have created and saved. For information on creating filter sets, see “Creating filter sets” on page 182, or see the online Help included with the application.

2 To add elements, click **Available**. The heading expands to reveal a table of available filter elements. Click the check box beside the filter elements that you want to include in the report, and then click **Update Selection Criteria** to move the elements to the Selected table.

Note: When choosing individual filter elements, you can select up to 250 entities. If you use multiple filters, the total number of entities selected for all filters cannot exceed 250.

When choosing filter sets, while you can apply more than one filter set to a report, the combined total number of filter elements in all filter sets that you apply to a single report cannot exceed 250. For example, you can apply one filter set that includes 150 skillsets, and another filter set that includes 100 agents to a single network-consolidated report because the total number of filter elements is 250.

3 To remove an element from the report, deselect the check box beside it in the Selected table, and then click **Update Selection Criteria**.

4 For the Estimated Revenue By Agent report, in the Per Unit $ box, enter the dollar amount to be used to calculate the revenue value for each activity code.

Note: The system multiplies this number against the number of occurrences of the activity code.

5 Continue with the following procedure to define the data range.

To define the data range

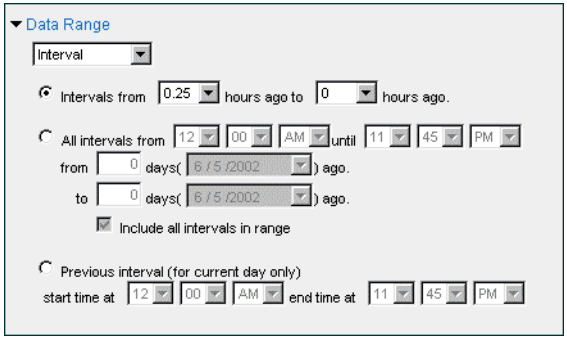
When you define the data range of user-defined reports, you can choose from Interval, Daily, Weekly, or Monthly collection periods.

1 In the Report Properties window, click **Data Range**. The heading expands to reveal a series of boxes. Choose the collection period for your report in the data range area.

Note: You cannot choose the data range for configuration reports. The collection periods available depend on the type of report that you choose. For example, for the Agent Performance Calls Answered, Bottom 5 report, you can choose only Daily. If you choose Interval, the collection period is 15 minutes.

2 Based on the collection period that you choose, you can enter information in the following boxes:

Interval data range



Interval data range boxes

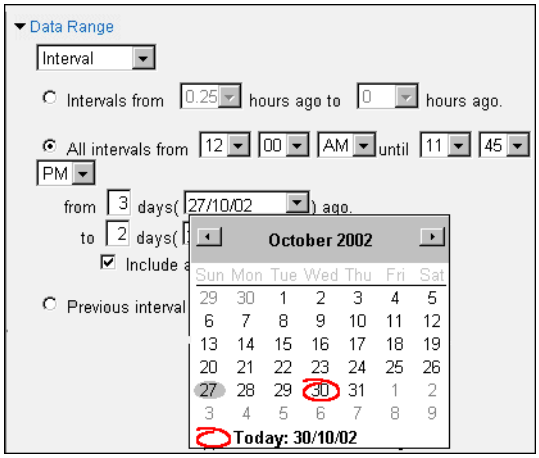
The system collects and stores interval data every 15 minutes. When you select Interval from the collection frequency drop-down list, you can specify the part of the day that you want to include in your report. For example, you can specify that you want to see the data collected in the past 3 hours up to the present time.

Intervals from *X* hours ago to *X* hours ago: Click this button to specify a period from up to 24 hours ago to the present, in 15-minute increments.

All intervals from *X* until *X* from *X* days ago to *X* days ago: Click this button to specify the start time and end time for data collection over a range of days. For example, to report on interval data collected from 3 days ago at 9:00 a.m. to yesterday at 9:00 a.m., you enter *from 9:00 a.m. until 9:00 a.m. from 3 days ago to 1 day ago*.

Tip: To make it easier to visualize a range a days, you can select dates from the pop-up calendars that appear when you click the arrows beside the drop-down lists. The system automatically translates the dates you choose into the corresponding range of days. The calendars are only for your convenience; the range of days that the system shows in the boxes overrides the dates when you run the report.

Example: Today is Wednesday, October 30, and you want to schedule an interval report to run every Wednesday that includes data for Sunday and Monday. When you click the drop-down lists beside the “days ago” boxes, you pick from Sunday, October 27 in the first calendar, to Monday, October 28 in the second calendar. The system automatically populates the days ago boxes with “From 3 days ago to 2 days ago,” as shown below:



When you schedule the report to run every Wednesday, the system takes into account the range of days—from 3 days ago to 2 days ago—instead of the dates.

Include all intervals in range: Deselect the check mark in this box if you want the report to include 24 hours of data over the range of days that you specify. For example, if you entered *from 3 days ago to 1 day ago*, the report includes interval data collected from 12:00 a.m. 3 days ago to 12:00 a.m. 1 day ago.

Previous interval: Click this button if you want to schedule a report to print or output to a file every 15 minutes during a specified time range on a single day only. For example, it is 8:30 a.m. and you want to schedule a report to print every 15 minutes containing data collected from 9:00 a.m. to 5:00 p.m. today. Enter a start time of 9:00 a.m. and an end time of 5:00 p.m. Then, in the Schedule area, select today's date. You must save and activate the schedule for the report to be generated.

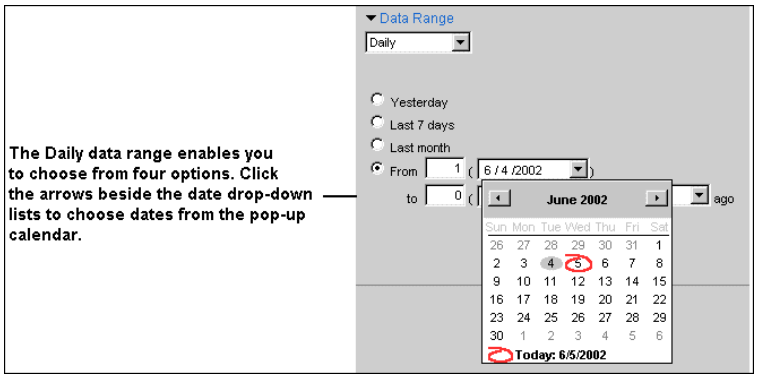
Notes:

- The data collection period actually ends one second prior to the specified end time. For example, to collect data for the period from 4:00 p.m. to 4:14:59 p.m., enter a start time of 4:00 p.m. and an end time of 4:15 p.m.
- For consolidated reports, if you are using time zone conversion, enter the time at the NCC.

Generate with time zone conversion: For reports generated at the NCC only. Select this option if you want to convert NCC time to local time for each site.

Example: The NCC is at Chicago, and the data extraction period is 10:00 a.m. to 11:00 p.m., and selected sites include Toronto and San Francisco. If you select this option, the report includes events occurring at Toronto between 11:00 a.m. and 12:00 p.m., and at San Francisco between 8:00 a.m. and 9:00 p.m.

Daily data range



Daily data range boxes

Immediately after the end of each day (that is, at 12:00 a.m. the next day), the system sums up all of the statistics collected during the day and makes them available to you for daily reports.

Note: You cannot generate a daily report on the current day. The most recent daily statistics are available only for yesterday. For example, if today is June 7 and you want to run a daily report for June 6, you can access the daily data for June 6 starting at 12:00 a.m. today.

Yesterday: Click this button to run a report containing 24 hours of daily data for yesterday (that is, from 12:00 a.m. at the start of yesterday, to 12:00 a.m. last night).

Last 7 days: Click this button to generate a report containing a week's worth of daily data ending last night at 12:00 a.m.

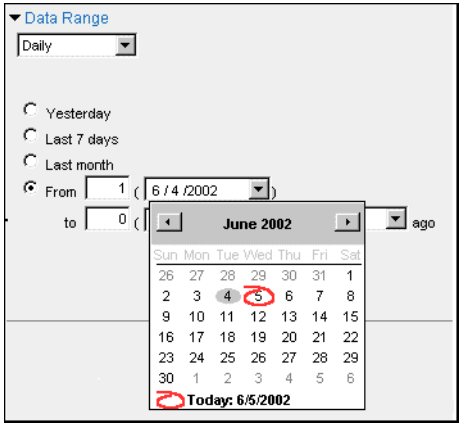
Last month: Click this button to generate a report containing monthly data for the past month. The report contains data collected from midnight on the first day of the month, until midnight on the last day of the month.

From *X* to *X* days/business days ago: Click this button to specify the number of days to include in your report, and then type the range of days in the boxes provided. To report on yesterday, select from **1** day ago to **0** days ago. You can choose from days or business days. Your administrator configures the first business day of the week and the length of the business week in the Configuration component of Symposium Web Client.

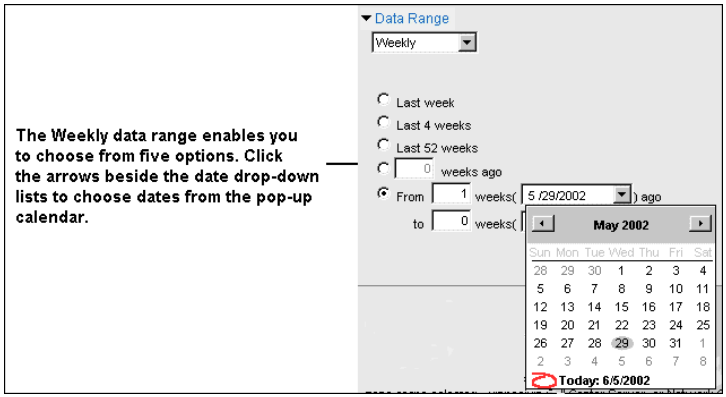
Tip: To make it easier to visualize a range a days, you can select dates from the pop-up calendars that appear when you click the arrows beside the drop-down lists. The system automatically translates the dates you choose into the corresponding range of days. The calendars are only for your convenience; the range of days that the system shows in the boxes overrides the dates when you run the report.

Example: Today is Wednesday, June 5, and you want to schedule a daily report that includes yesterday's data to run every day from Monday to Thursday. In the first pop-up calendar, you choose Tuesday, June 4. In the second pop-up calendar, you choose today's date, Wednesday, June 5. The system automatically populates the days ago boxes with the daily range of

"from 1 day ago to 0 days ago," as shown in the graphic below. When you schedule the report, the system takes into account this daily range, not the specific dates that you choose, and runs the report every day from Monday to Thursday, including data for the previous day.



Weekly data range



Weekly data range boxes

After the end of each day of the week, the system creates weekly data containing the totals for each day. This weekly data is available at the start of the day for the period running up to the completed days of the current week. For example, if your business week starts on Monday and you want a report detailing the amounts for the previous week, the data is available Monday at 12:00 a.m. for the period ending Sunday night at 11:59 p.m.

Last week: Click this button to generate a report containing one week of weekly data for the previous business week. The time range included in the report depends on the first business day of the week. If the first business day is Monday, when you generate the report, it includes data from two Mondays ago to the start of this past Monday (12:00 a.m.), the first business day of this week.

Last 4 weeks: Click this button to generate a report containing four weeks of weekly data. The time range included in the report depends on the first business day of the week. If the first business day is Monday, when you generate the report, it includes data from four Mondays ago to the start of this past Monday (12:00 a.m.), the first business day of this week.

Last 52 weeks: Click this button to generate a report containing one year of weekly data. The time range included in the report depends on the first business day of the week. If the first business day is Monday, when you generate the report, it includes data from Monday 52 weeks ago to the start of this past Monday (12:00 a.m.), the first business day of this week.

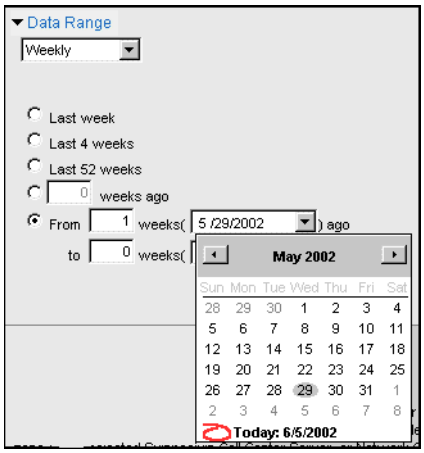
***X* weeks ago:** Click this button to generate a report containing weekly data for a particular week in the past, or up to and including the completed days of the current week. Then type the number corresponding to the week in the box provided. Type **1** in the box to generate a report containing last week's data. Type **0** in the box to generate a report containing the data for all the completed days since the first day of the current week. For example, if your business week starts on Monday and today is Thursday, if you type **0** in the box, the generated report contains data from Monday to Wednesday.

From *X* to *X* weeks ago: Click this button to generate a report containing weekly data for a range of weeks in the past, up to and including the completed days in the current week. Then, type the weekly range in the boxes. To generate a report containing data up to and including the previous week, type **1** week ago in the second box. To generate a report containing data up to and including the completed days of the current week (based on the first business day), type **0** in the second box.

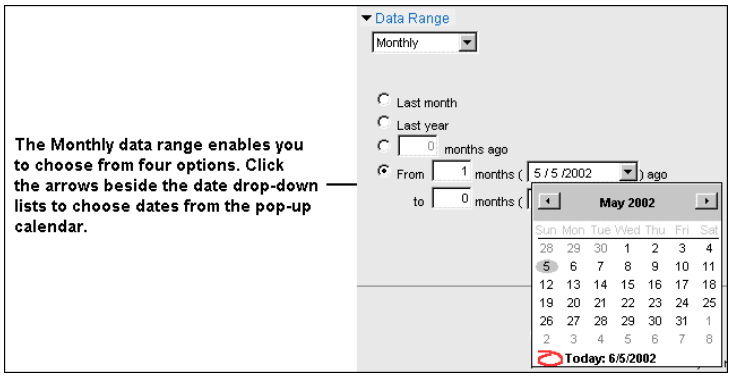
Tip: To make it easier to visualize a range a weeks, you can select dates from the pop-up calendars that appear when you click the arrows beside the drop-down lists. The system automatically translates the dates you choose into the corresponding range of weeks. The calendars are only for your convenience; the range of weeks that the system shows in the boxes overrides the dates when you run the report.

Example: Today is Wednesday, June 5, and you want to schedule a report that includes weekly data from the previous Wednesday up to and including the most recent data for the current week. You schedule the report to run every Wednesday. In this case, the most recent weekly data is available for the entire day of Tuesday. (Weekly data is only available for the completed days in the current week. You cannot generate a report containing weekly data for the current day.) From the first pop-up calendar, you choose last Wednesday, May 29. From the second pop-up calendar, you choose today's date, Wednesday, June 5. The system automatically populates the weeks ago boxes with the range of "from 1 week ago to 0 weeks ago," as shown in

the graphic below. When you schedule the report, the system takes into account this range, not the specific dates that you chose. It generates the report every Wednesday, including data from the previous Wednesday until Tuesday, the most recent completed day in the current week.



Monthly data range



Monthly data range boxes

Each day during the month, the system collects statistics and adds them to the current monthly data total. The current monthly data is made up of all completed days so far this month. For example, if you want to generate a monthly report for the entire month of January, you can access the data on February 1 at 12:00 a.m.

Last month: Click this button to generate a report containing monthly data for last month.

Last year: Click this button to generate a report containing monthly data for the past year. The report includes data from January 1 of last year to January 1 of the current year.

***X* months ago**: Click this button to generate a report containing monthly data for a particular month, or for the completed days of the current month. Then type the number corresponding to the month in the box provided. For example, type **1** month ago to generate a report containing last month's data, from midnight on the first day of the month, until midnight on the last day of the month. If you type **0** in the box, then the generated report contains data for all the completed days of the current month. For example, if today is June 15 and you type **0** in the box, then the generated report contains data from June 1 to June 14.

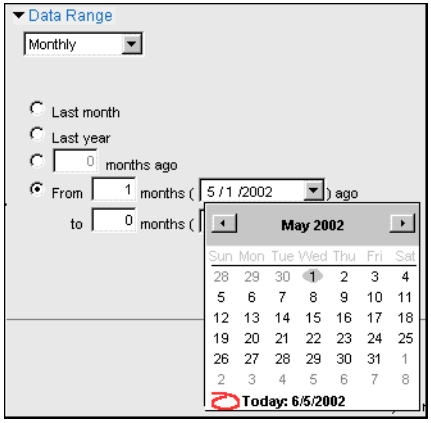
Note: If you type **0** in the box and today is the first day of the month, then the generated report contains no data because there are no completed days in the current month.

From *X* months ago to *X* months ago: Click this button to generate a report containing monthly data. Then, select the range of months from the drop-down lists. To include monthly data for the past month, specify until **1** month ago. To view data up to and including all the completed days in the current month, specify until **0** months ago.

Tip: To make it easier to visualize a range a months, you can select dates from the pop-up calendars that appear when you click the arrows beside the drop-down lists. The system automatically translates the dates you choose into the corresponding range of months. The calendars are only for your convenience; the range of months that the system shows in the boxes overrides the dates when you run the report.

Example: Today is Wednesday, June 5, and you want to schedule a report that includes monthly data from the first day of last month up to and including the most recent data for the current month. You schedule the report to run on the 15th of every month. In this case, the most recent monthly data is available for the current month up to and including the 14th day. (Monthly data is only available for the completed days in the current month. You cannot generate a report containing monthly data for the current day.) From the first pop-up calendar, you choose May 1. From the second pop-up calendar, you choose today’s date, Wednesday, June 5. The system automatically populates the months ago boxes with the range of “from 1 month ago to 0 months ago,” as shown in the graphic on page 215. When you schedule the report, the system takes into account this range,

not the specific dates that you chose. It generates the report on the 15th of every month, including data from the first day of the previous month until the 14th of the current month, the most recent completed day in the current month.



3 Continue with the following procedure to define the report schedule.

To define the report schedule

You can schedule reports in your group and private folders to output to a file or to print, or both. You can also specify one or more e-mail addresses where the system can send notification that the report has been generated successfully, or that there were problems preventing the report from being generated. If the system cannot generate the report, the e-mail notification contains possible reasons for the failure, enabling you to repair the problem and generate the report again.

When you choose to output the report to a printer, you can choose the paper size for your report.

Note: The combined number of ad hoc or scheduled reports that you can generate simultaneously is limited to five. You can schedule as many historical reports as required; however, only five scheduled reports are processed simultaneously, while the others wait in queue. Likewise, for ad hoc reports, only five reports can be generated at the same time. For example, five supervisors can generate an ad hoc report, but the sixth supervisor to do so receives a message saying the system could not process the request. This

supervisor must try to generate the ad hoc report again later, after the first five reports have been generated (or schedule the report to run later). This limitation applies to the *total* of the ad hoc and scheduled reports that can be generated at a particular time. For example, if two reports are scheduled to be output at noon, then only three ad hoc reports can be generated at this time, bringing the total to five.

1 In the Report Details section of the window, from the Time zone drop-down list, note the time zone in which you chose to run or schedule your report.

ATTENTION

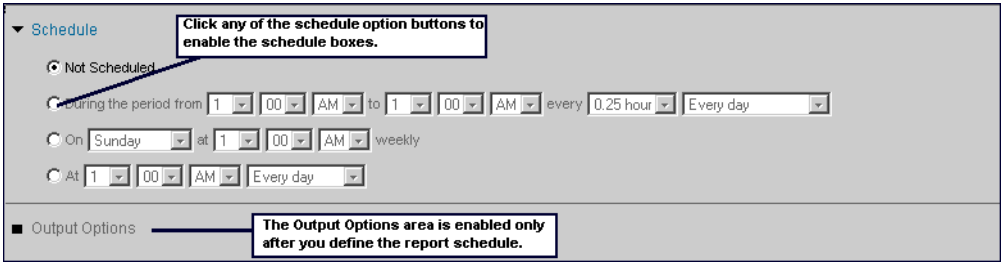
The schedule time that you specify is based on the time zone that you choose. However, the system translates the schedule time that you enter to the time zone in which the application server is located. The report is generated at the time and in the time zone you specify, but the timestamp at the bottom of the generated report reflects the application server time. For more information on time zones, see “Reports and time zones” on page 195.

The report schedule that you define cannot start in the p.m. range and end in the a.m. range. Therefore, when the system converts your selected time to application server time, an error message appears if the *converted* start time is in the p.m. range and the *converted* end time is in the a.m. range. In this case, you must reenter the schedule start and end times, taking into account the time difference with the application server.

Example: The application server is located in a time zone that is 2 hours later than the time zone you choose from the Time Zone drop-down list. You enter a schedule start time of 9:00 p.m. and an end time of 11:00 p.m. However, when you submit your schedule, the system converts the schedule start time to 11:00 p.m. and the schedule end time to 1:00 a.m., application server time. In this case, an error message appears because the schedule that you define cannot start in the p.m. range and end in the a.m. range. You must reenter the schedule start and end times, taking into account the time difference with the application server.

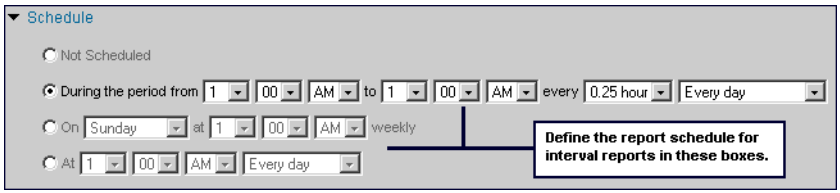
2 Close the Report Details section.

3 To open the Schedule section, click **Schedule**. The heading expands to reveal a series of boxes.



4 The schedule that you can define depends on the type of data range that you have selected. Click any of the option buttons beside the schedule boxes to enable them. You can enter information in the following boxes:

Schedule boxes available for Interval data range

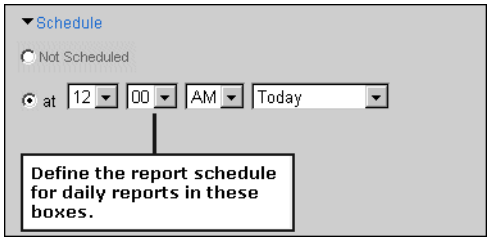


During the period from *X* to *X*: Click this button to schedule an interval report to be generated at regular intervals within a defined time range every day, every business day, on selected days of the week, or on specific dates. For example, click this button if you want to generate a report every 15 minutes between 9:00 a.m. and 5:00 p.m. every Wednesday and Sunday. Then enter the times in the boxes.

On *X* at *X* weekly: Click this button to generate an interval report on a particular day, at a particular time every week. For example, click this button to generate a report every Monday morning at 9:00 a.m.

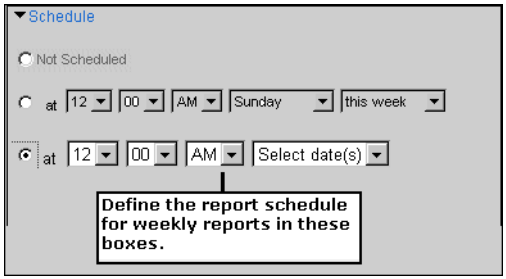
At *X* every day/specific days of the week/specific dates: Click this button to generate an interval report at a specific time every day, or on specific days of the week, or on specific dates. For example, click this button to generate a report at 9:00 a.m. on the first day and 30th day of every month.

Schedule boxes available for Daily data range



At *X* today/every day/days of the week/specific dates: Specify the time when you want to generate a daily report. For example, you can choose to generate your daily report at 9:00 a.m., Monday through Friday.

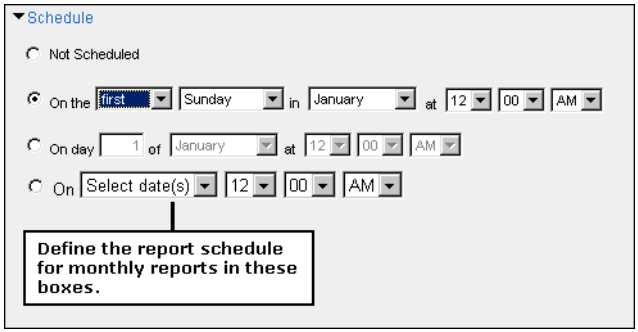
Schedule boxes available for Weekly data range



At *X* this week/every week: Specify the time and day when you want to generate a weekly report, either this week, or every week. For example, you can specify that you want to generate a weekly report at 10:00 a.m. every Tuesday.

At *X* on specific dates: Specify the time and dates when you want to generate a weekly report. For example, you can specify that you want to generate a weekly report at 10:00 a.m. on the 15th of every month.

Schedule boxes available for Monthly data range



On the *X* in X at *X*: Click this button to schedule a monthly report to run on a specific day and month, at a specific time. You can also choose to run the report every month. For example, you can run a monthly report on the third Sunday every month at 12:00 p.m.

On day *X* at *X*: Click this button to schedule a monthly report to run on a specific date during a specific month, at a specific time. You can also choose to run the report every month. For example, you can run a monthly report on March 17 at 12:00 p.m.

On specific dates at X: Click this button to schedule a monthly report to run on specific dates during specific months, at a specific time. For example, you can run a monthly report on the 15th of every second month at 12:00 p.m.

5 Continue with the following procedure to define the output options.

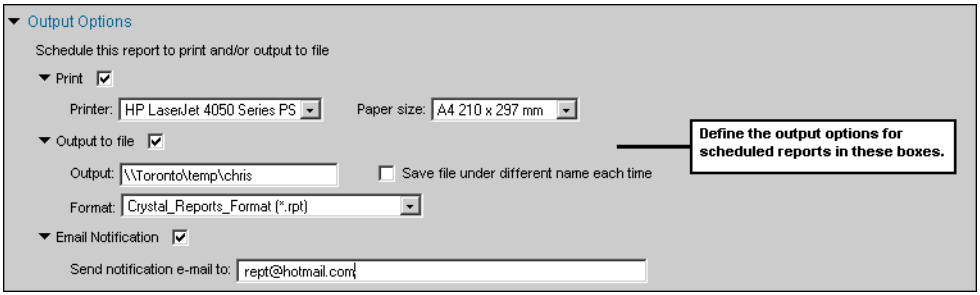
To define output options

After you have scheduled the report, you must define the way the system generates it. You can specify whether you want to print the scheduled report when it is generated or save it as a file, or both. If you choose to print the report, you can select the paper size.

You can also specify one or more e-mail addresses where the system can send notification that the report has been generated successfully, or that there were problems preventing the report from being generated. If the system cannot generate the report, the e-mail notification contains possible reasons for the failure, enabling you to repair the problem and generate the report again.

Note: If you choose to output the report to a file, you must specify a shared folder where the application server will send the output file. This folder can be on your computer, on another computer in the network, or on the application server. If the folder that you specify is on a computer other than the application server, the network administrator must map to this shared folder from the application server, and the computer must be within the same domain as the application server. For more information, see the *Symposium Web Client Planning, Installation, and Administration Guide*.

If you want to output a scheduled report to a printer, ensure that your administrator has configured a default printer on the application server. If a default printer has not been defined, then you can only output reports to a file.



1. Once you have scheduled the report, the Output Options heading is enabled (if you have not scheduled the report, the heading is disabled). Click **Output Options** to reveal the output options boxes.
2. Click the **Print** check box or the **Output to file** check box, or both.
3. To print the report, from the Printer drop-down list, select the printer to which you want to print the scheduled report.
4. From the Paper size drop-down list, select the appropriate paper size for the printed report.
5. To output the report to a file, in the Output box, type the path to the shared folder where the report will be output. The path should have the format \\[*computer name*]\[*shared folder name*]\[*file name*], without the file extension. For example, you want to output the Agent Performance report to a shared folder on the application server. The application server computer name is *appsrvr*, the shared folder name is *reports*, and you

decide to call the report *agent*. You type *appsrvr**reports**agent* in the Output box.

Note: Click the **Save file under different name each time** check box if you want the system to save the report with a different name each time it is generated. If you do not check this box, the system overwrites previously generated reports with the updated versions every time they are generated.

6 From the Format drop-down list, select the export file format that you want to use.

Note: Some export formats do not support all report features. If your report output does not look the way you expect, use a Crystal Reports, RTF, or Excel format.

7 Click the **Email Notification** check box if you want the system to notify you when the report has been generated. Then type one or more e-mail addresses in the **Send notification e-mail to** box. You can type a maximum of 255 characters in the box, with each e-mail address separated by a semi-colon (;).

8 You must click **Save Report** to save your user-defined report.

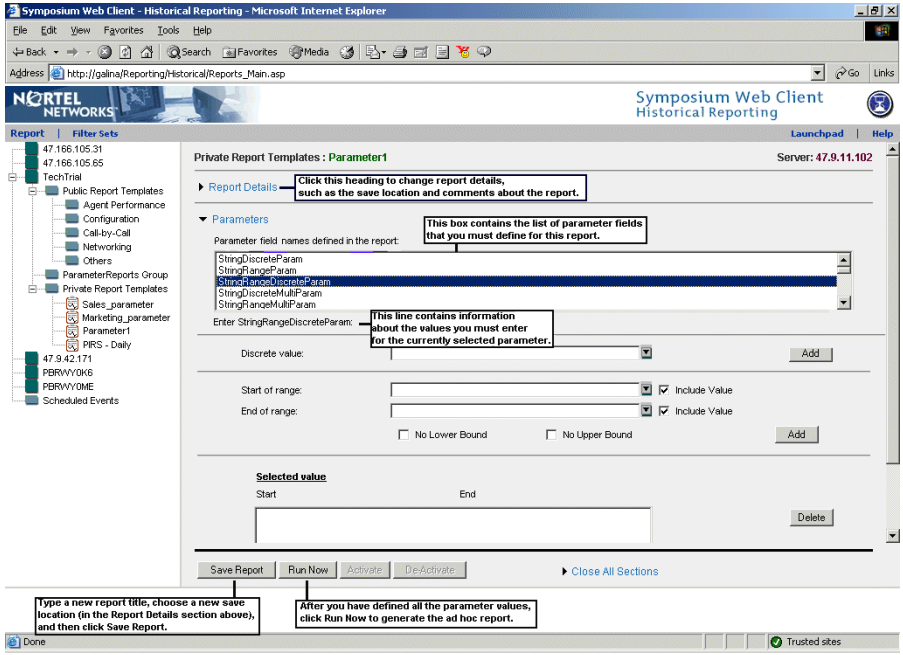
9 Click **Activate** to activate the report's schedule.

Working with parameter reports

A parameter report is a Crystal Reports template with special parameter fields that require the user to enter or select data at the time of running the report. Some examples of parameter fields that may require user input are the date, time, number, currency, or DateTime (combined value).

After you import a parameter report with the Template Importing Wizard, to work with the report, you must select it in your Private Report Templates folder under the same server in Symposium Call Center Server to which you imported the report.

The report appears in the Report Details window, as shown in the following graphic:



Note: The Activate and De-Activate buttons are always disabled for parameter reports since you cannot schedule this type of report.

Sharing parameter reports

To share the parameter report with other users, click the **Report Details** section heading. In this section, you can enter a new report title, and then save the report in your Group folder (if you have access to a group folder) by clicking **Save Report** at the bottom of the window.

Note: Since parameter reports require user input at the time of running, you cannot save the values that you select when you run the report. Instead, each time you run the report, you must select or type the parameter values.

Running parameter reports ad hoc

To run the report, you must type or select the values for all the parameter fields listed in the parameters box. For help on each parameter, click the parameter field and note the instructions that appear below the box. Then fill out the parameter field values in the boxes provided. When you have filled out all the values for each parameter field listed, click **Run Now** to run the report ad hoc.

Note: Since parameter reports require user input at the time of running, you can only run these reports on an ad hoc basis; you cannot schedule parameter reports. Likewise, you cannot define the data range, selection criteria, or the output options for this type of report.

Printing parameter reports

You must generate the parameter report ad hoc before you can print it. When you define the report values and click **Run Now**, the Ad Hoc Report Viewer appears. Click the print icon in this window to print the ad hoc report with the values you have defined.

Other procedures for reports

Introduction

After you define a report, you can change it or delete it. For step-by-step procedures on editing and deleting reports, see the online Help included with the application.

To change report properties

You can change the following properties for a user-defined report:

- general report information—including report name
- selection criteria—the entities to be included in the report (not applicable to user-created reports)
- report schedule—when the report is to be generated
- data range—the data collection period for the report
- output options—the printer or file to which the report is to be output
- network site properties—(for network consolidated reports only) the sites to be included in the report

To delete user-defined or user-created reports

Note: You cannot delete standard public report templates, or group reports that other members of your group have created.

ATTENTION

If the report schedule is active, you must deactivate it before you can delete the report. For more information, refer to “Deactivating reports” on page 230.

From the system tree, select the report, and then choose Report → Delete.

Section B: Using reports

In this section

Overview of using reports

Introduction

Once you have created the user-defined or user-created reports, you can activate or deactivate their schedules and print them or output them to a file.

Scheduled report printing prerequisites

A scheduled report prints at the scheduled time if your administrator configures a default printer on the application server. For more information, see the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*.

Standard public reports cannot be scheduled, but you can run them ad hoc and preview or print them as needed.

Interpreting comma- and character-separated value reports

When you export a scheduled report in comma- or character-separated value format, the program generates a line for each record in the report. Each record line also contains all the header, summary, and footer information applicable to the record. The program processes headers and footers one line at a time.

For example, a comma-separated value record for the following report looks like this:

“Agent Average Calls per Hour - Daily”,“BestAir Airlines”,“Report Interval: 00:00:00 07 May, 2001 - 23:45:00 07 May, 2001”,“Site Name: TORONTO”,“Table Name: dAgentPerformanceStat”,“Average Answered”,“per Hour”,“Average Talk Time”,“Average Not Ready Time”,“GRAND TOTAL”,22.77,“00:46:56”,“00:02:12”,“Agent Name & ID: Jon Carlos - 6709”,“Summary:”,“16.80”,“00:44:39”,“00:02:32”, “4/6/01”,16.80,“00:44:39”, “00:02:32”,“Agent”,16.80,“00:44:39”,“00:02:32”,“GRAND TOTAL”,22.77, “00:46:56”,“00:02:12”,“C:\REPORTS\flat\dm-agt9.rpt”,“Printed By: sysadmin 5/8/01 10:23:21 AM”,“Page 1 of 1”

Agent Average Calls per Hour - Daily

BestAir Airlines
Site Name: TORONTO
Table Name: dAgentPerformanceStat

Report Interval: 00:00:00 07 May, 2001 - 23:45:00 07 May, 2001

	Average Answered per Hour	Average Talk Time	Average Not Ready Time
GRAND TOTAL			
	22.77	**00:46:56**	**00:02:12**
Agent Name & ID: Jon Carlos - 6709			
Summary:	16.80	00:44:39	00:02:32
4/6/01	16.80	00:44:39	00:02:32
Agent	16.80	00:44:39	00:02:32
Agent Name & ID: Tom Wilson - 6761			
Summary:	52.00	01:00:52	00:00:04
4/6/01	52.00	01:00:52	00:00:04
Agent	52.00	01:00:52	00:00:04
Agent Name & ID: Lori Vandenberg - 6763			
Summary:	48.00	00:57:12	00:03:40
4/6/01	48.00	00:57:12	00:03:40
Agent	48.00	00:57:12	00:03:40
Agent Name & ID: Brandon Woo - 6841			
Summary:	38.34	00:56:44	00:00:04
4/6/01	38.34	00:56:44	00:00:04
Agent	38.34	00:56:44	00:00:04
Agent Name & ID: Dylan Marcus - 6844			
Summary:	32.00	00:46:32	00:00:04
4/6/01	32.00	00:46:32	00:00:04
Agent	32.00	00:46:32	00:00:04
Agent Name & ID: Ronnie Heintz - 6912			
Summary:	68.00	01:01:28	00:00:04
4/6/01	68.00	01:01:28	00:00:04
Agent	68.00	01:01:28	00:00:04
GRAND TOTAL			
	22.77	**00:46:56**	**00:02:12**

C:\REPORTS\station-ag19.rpt

Printed By: sysadmin 5/8/01 10:23:21 AM

Page 1 of 1

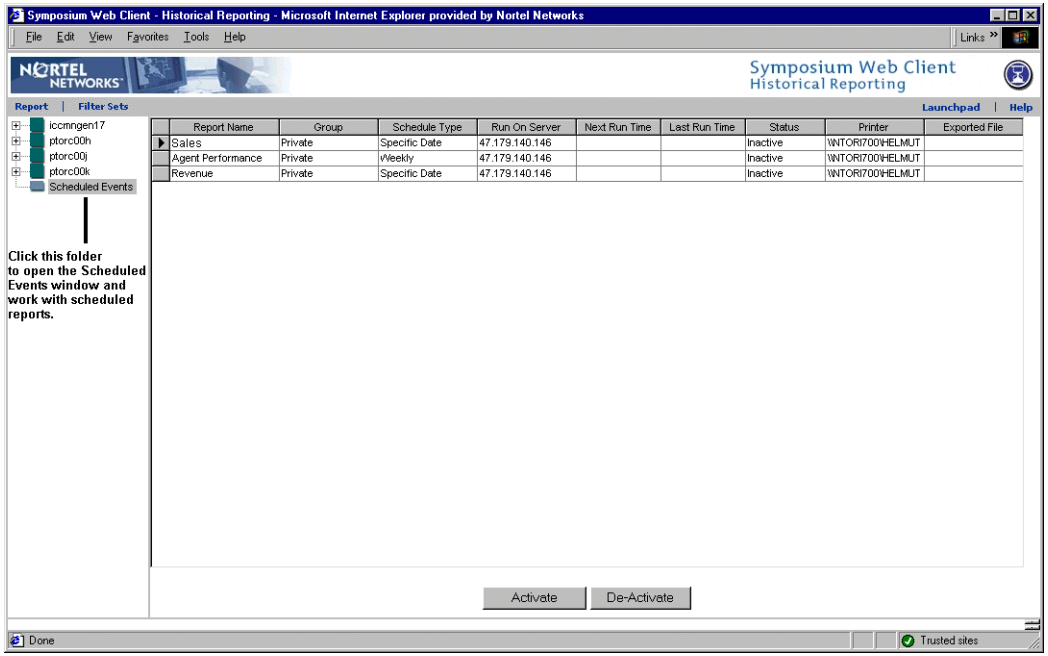
Confirming a report schedule

Introduction

After you schedule a private or shared report and save your changes, you can confirm the report's schedule by opening the Scheduled Events window.

To confirm a scheduled report

1 On the system tree, click **Scheduled Events**. The Scheduled Events window appears, listing all the scheduled reports on all servers in your network.



2 Locate the scheduled report in the table and verify that the schedule details are accurate.

3 To return to the Report Properties window, double-click a report on the system tree.

Activating reports

Introduction

Follow these procedures to activate a report schedule. After you schedule a report, you must activate, or turn on, the schedule. The report is not generated until the schedule is activated. To schedule the report, refer to “To define the report schedule” on page 215.

To activate a report

You can activate a report’s schedule in two ways:

- You can click **Activate** in the Report Properties window after you schedule a new report and click **Save Report**, or after you modify an existing report’s schedule and click **Save Report**.
- You can click **Activate** in the Scheduled Events window. For details, see the following procedure:

1. On the system tree, click **Scheduled Events**. The Scheduled Events window appears, listing all the scheduled reports on all servers in your network.
2. Select the report that you want to activate.
3. Click **Activate**.
4. To return to the Report Properties window, double-click a report on the system tree.

Deactivating reports

Introduction

Follow these procedures to deactivate, or turn off, a report schedule. For example, you can deactivate reports during holidays. When you deactivate a report schedule, the report definition and schedule remain, but the report is not generated until you reactivate it.

To deactivate a report

You can deactivate a report's schedule in two ways:

- You can click **DeActivate** in the Report Properties window when you are viewing the properties of a scheduled report.
- You can click **De-Activate** in the Scheduled Events window. For details, see the following procedure:

1. On the system tree, click **Scheduled Events**. The Scheduled Events window appears, listing all the scheduled reports on all servers in your network.
2. Select the report that you want to deactivate.
3. Click **De-Activate**.
4. To return to the Report Properties window, double-click a report on the system tree.

Previewing and printing ad hoc reports

Introduction

You can preview an ad hoc report before printing it.

ATTENTION If you use a postscript printer, use the printer driver provided by the manufacturer. Generic and old postscript printer drivers can result in the cropping of letters and other problems.

To preview or print an ad hoc report

You can print ad hoc reports with their default properties, or you can define the selection criteria and the data range first.

1. On the system tree, click the server containing the report that you want to print.
2. Double-click the folder containing the report that you want to print. The folder expands to reveal the list of reports.
3. Select the report that you want to print. The report properties appear in the right pane.
4. Before you can print the report, you must run it. You can run the report with its current properties, or you can define the selection criteria and data range, and then run the report. For more information, see “To define the report schedule” on page 215, and “To define the data range” on page 205.
5. Click **Run Now** to generate the report with the properties that you have specified. The Ad-Hoc Report Viewer appears, enabling you to preview the generated report.

   Note: When you click Run Now, the system does not save your customized properties. To save your properties, you must enter a report name in the Save As box, choose a save location, and click **Save Report**. For more information, see “To create a user-defined report” on page 200.
6. Click the printer icon to print the report to the default printer configured on your computer.

Chapter 6

Emergency Help

In this chapter

Overview

An agent may require assistance from the Supervisor if, for example, the caller is abusive. To contact the Supervisor, the agent presses **Emergency** on his or her phoneset. When the button is pressed, the following events occur:

- The Emergency button on the Supervisor's phoneset lights up.
- If the Supervisor is logged on to the Emergency Help component of Symposium Web Client and has the Emergency Help display open or minimized on his or her desktop, a line of data detailing the emergency situation appears in the Emergency Help table. If the Emergency Help display is minimized when the emergency situation occurs, the display automatically opens on the supervisor's desktop.

This chapter describes the main features of Symposium Web Client's Emergency Help component. For more detailed information, see the online Help included with the application.

Starting Emergency Help

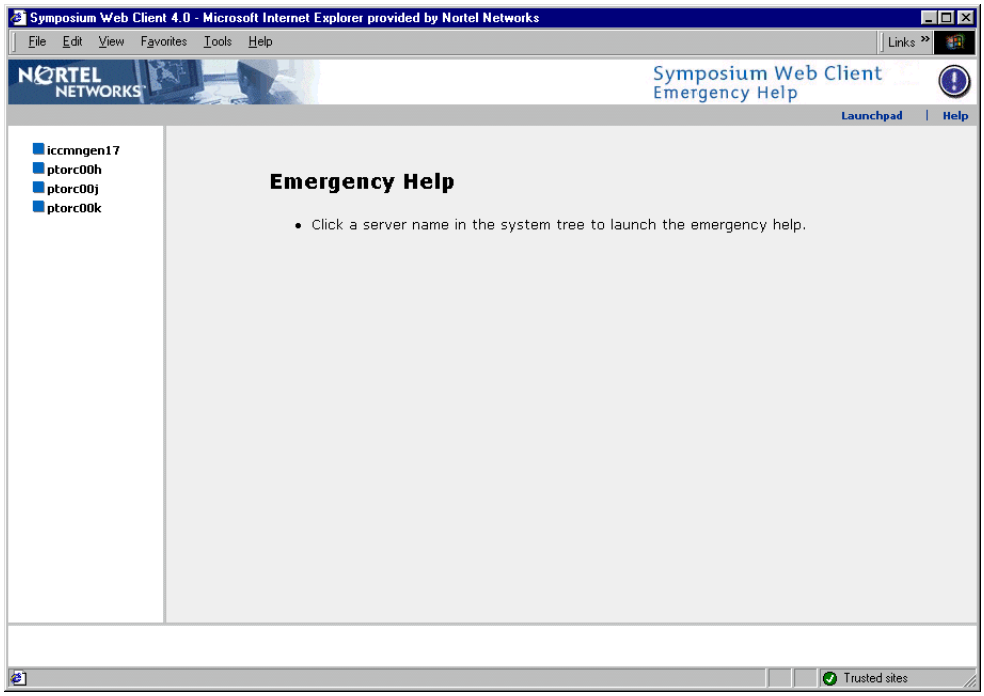
Introduction

When you log on to the Symposium Web Client application server, you can open the Emergency Help component from the main launchpad.

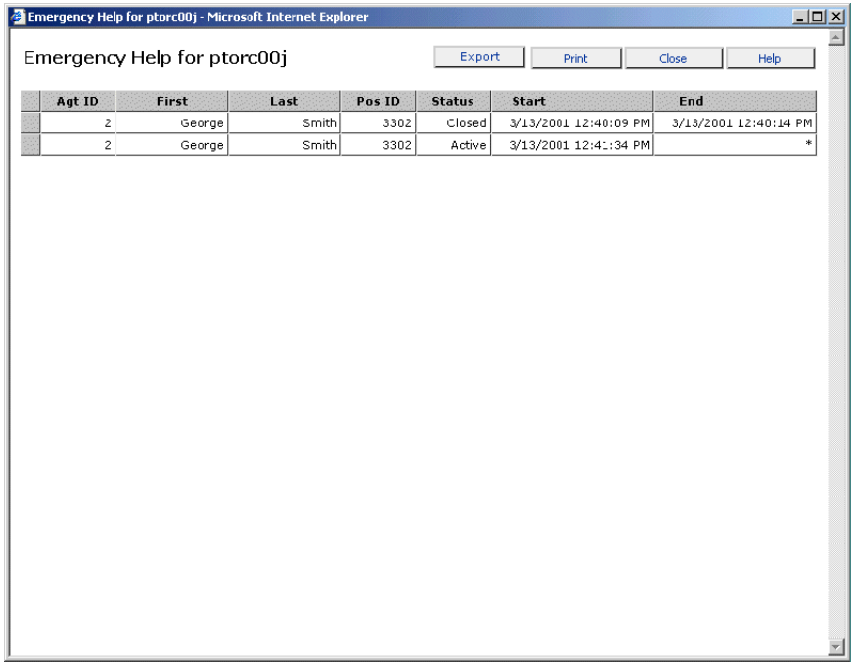
To start the Emergency Help display

To view the Emergency Help, you must have the Emergency Help display open and minimized or maximized on your desktop. If an agent presses Emergency on his or her phoneset when you do not have the Emergency Help component open, you do not see the Emergency Help details. If an agent presses Emergency on his or her phoneset when you have the Emergency Help display minimized on your desktop, the system automatically opens the display.

1 To view the Emergency Help window, click Emergency Help in the main launchpad, or on the Launchpad menu from any Symposium Web Client component. The main window appears.



2 On the system tree, click the server on which you want to view the Emergency Help. The Emergency Help window for that server appears.



The window shows the name, logon ID, and position ID of the agent who pressed the Emergency key. While the emergency situation is in effect, the agent's status is Active. It also shows the time when the emergency situation begins and ends.

You can print the list of agents in this window by clicking **Print**. You can also export snapshots of the Emergency Help displays as HTML files to the application server by clicking **Export**. You can use this snapshot data for future reference.

For more information on Emergency Help and for step-by-step procedures, see the online Help included with Symposium Web Client.

When an emergency is resolved

When the emergency has been resolved and the agent presses the Emergency key again, the agent's status in the Emergency Help window changes to Closed, and the time when the situation ended appears.

Chapter 7

Troubleshooting

In this chapter

Overview

This chapter provides simple investigative tips to use when solving problems that can arise during daily call center operation. This section is not intended as a comprehensive troubleshooting guide, but as a guideline for supervisors who experience difficulty in completing their normal functions.

You cannot access a report

Situation

You are logged on to a server on the system tree and you are attempting to generate a report. However, the report that you want to generate does not appear in any of the folders on the system tree.

Investigation

To identify the reason why the tree does not contain the desired report, answer these questions:

Question	Yes	No
Are you logged on to the correct server in the tree?	Check the next question.	Each type of server (M1/Succession 1000/ M1 IE nodal and networking, DMS/MSL-100, NCC) contains specific types of standard public report templates. If you do not see a type of report template under one server, try logging on to another server.
Is the report included in the partition assigned to you?	Check the next question.	Ask your system administrator to include the report in the partition assigned to you.
If the report is a user-defined report, are you logged on with the user ID of the user who created the report?	Check the next question.	When you save a user-defined report in your Private Report Templates folder, your user ID is stored with it. Only you can access the report. If someone else logs on to the PC, he or she cannot access it. Therefore, make sure that you log on as the user who defined the report.

Question	Yes	No
If the report is a user-defined report, are you logged on to the server on which the report was defined?	Check the next question.	When you save a user-defined report in your Private or Group folder, the server name is stored with it. If you log on to another server, you cannot access the report. Therefore, make sure you are logged on to the server to which you were connected when you defined the report.
Can you generate the report?	No further action required.	Contact your administrator for assistance.

You cannot print scheduled reports

Situation

You have scheduled a report to be printed. After the time to print has elapsed, you find that no report was generated.

Investigation

To identify why the scheduled report was not printed, answer the following questions:

Question	Yes	No
Has the administrator configured a default network printer on the application server?	Check the next question.	Ask your administrator to configure a default network printer on the application server. The printer must be accessible to clients who are using Historical Reporting. See the *Symposium Call Center Web Client Planning, Installation, and Administration Guide* for further information.
If the report is a user-created report, are all data and formulas valid?	Check the next question.	Report the problem to the author of the report.
If the report is a network report, is the network site available?	Check the next question.	Contact the network administrator to determine whether you have access to the network site, and to find out whether the server is currently running.
Does the selection criteria for the report contain less than 250 entities?	Check the next question.	Use the Report Properties window to check the Selection Criteria. Make sure that the number of entities selected is 250 or fewer.

Question	Yes	No
Is the IP address of the client PC unchanged?	Check the next question.	Scheduled reports are saved with the IP address of the server on which they were scheduled. If the server's IP address has changed, you must reschedule the report to reflect the new IP address.
Can you generate the report?	No further action required.	Contact your administrator for assistance.

Network call-by-call reports are missing data

Situation

You have generated a network call-by-call report, but the report does not contain information about a call that was answered at the destination site during the selected interval.

Investigation

This problem occurs if the clocks at the source and destination sites are not synchronized. For example, a call is networked out from Toronto at 13:16:00 local time, and is answered at Chicago at 14:14:21 local time. In the Site parameters, the Time Zone Relative to GMT is configured as follows:

Site	Time Zone Relative to GMT
Toronto	GMT-5
Chicago	GMT-6

The Chicago administrator wants a Network Call By Call Statistics report with details about this call, and requests a report for the period from 13:00:00 to 13:15:00 (after converting local time to the time zone of the source site). The requested report does not contain any information about the desired call, because the Network Call By Call Statistics report only contains information about calls networked out from Toronto during this period, and the call was actually networked during the previous period.

To troubleshoot the problem, check and synchronize the clocks at the source and destination servers.

For more information on time zones, see “Reports and time zones” on page 195.

You receive the error “There is a problem connecting to the data source” in Historical Reporting

Situation

You are trying to run historical reports, but when you connect to the server in Symposium Call Center Server, you see an error message in the ad hoc report preview window saying “There is a problem connecting to the data source.”

Investigation

This problem can occur when the bindings order of the ELAN and CLAN network cards on the server in Symposium Call Center Server is not set up correctly. Your administrator must configure the bindings order of the network interface cards so that the CLAN card comes first, then the ELAN card, and then the virtual adapters for remote access. For details, see the Troubleshooting chapter of the *Nortel Networks Symposium Call Center Web Client Planning, Installation, and Administration Guide*.

You cannot launch real-time displays

Situation

When you log on to the client PC and try to launch a real-time display, it does not launch. In Symposium Web Client 4.5, for the real-time displays to launch properly, the system downloads and registers a new RTDControl to the client PC when you launch a real-time display for the first time. If you cannot launch real-time displays on a client PC, then it may be because you have enforced user policies that deny access to the registry on the PC, and, therefore, prevent the system from downloading and registering the new RTDControl.

Solution

1. Log on to the client PC as the local administrator (or as a user with registry permissions).
2. Open Symposium Web Client.
3. Open the Real-Time Reporting component.
4. Launch a real-time display.

   Result: The system downloads and registers the required RTDControl to the client PC. Now regular users can log on to the client PC and launch real-time displays.
5. Perform this procedure on every client PC upon which real-time displays will be launched.

Real-time displays are blank

Situation

When you launch a real-time display, there is no data.

Investigation

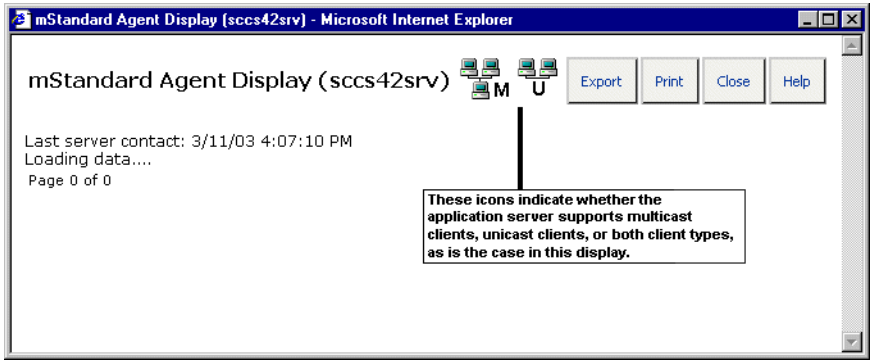
Check the following:

- Ensure that the LAN/WAN supports multicast traffic by contacting your network administrator to confirm that the routers have multicast capabilities.
- Verify that you can send and receive data between the server in Symposium Call Center Server, the application server, and the application server clients. For more information, see the *Symposium Call Center Web Client Planning, Installation, and Administration Guide*.
- Confirm that the RSM components are sending data to the same IP multicast address.
- Check the IP Receive address for the application server. Make sure that it matches the IP Send multicast address setting in Symposium Call Center Server. See “Modifying RSM settings and multicast rates” in the *Symposium Call Center Web Client Planning, Installation, and Administration Guide* for more information.

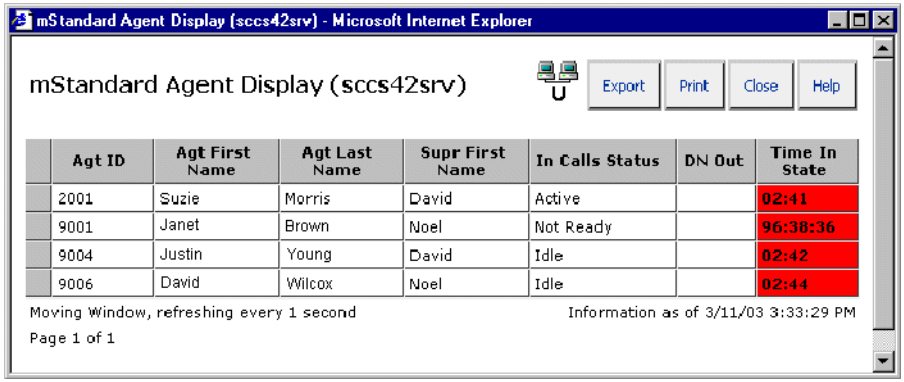
Multicast and unicast icons in real-time displays

To help you troubleshoot problems with real-time displays, when you first launch a display and while the system is retrieving data, an icon appears on the display, identifying whether the application server supports multicast clients, unicast clients, or both multicast and unicast clients.

The graphic on page 249 shows a display in which both icons are shown, indicating that the application server supports both multicast and unicast. In cases where only one transmission method is enabled, the corresponding icon appears on the display alone.



Once the display is launched, the icon indicates the transmission mode that is actually being used to launch the display. The following graphic shows a display that is receiving data through a unicast connection, a dedicated connection between the application server and client PC:

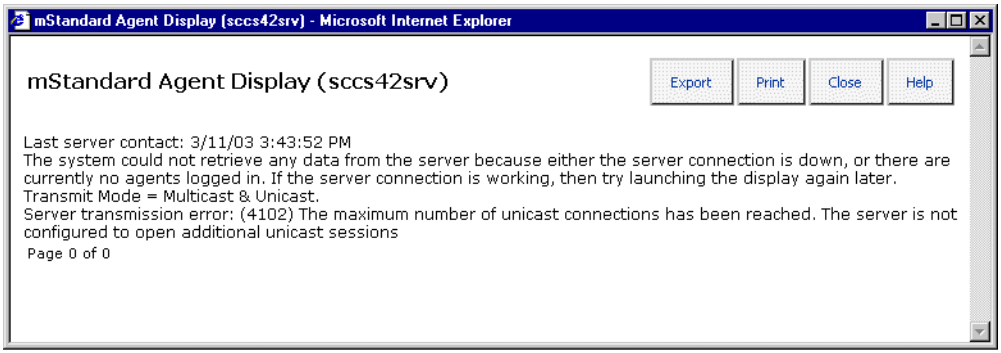


If this display were receiving multicast data, there would be a multicast icon at the top and there would be no direct connection to the application server. Instead, the client would be “listening” to a shared multicast data stream.

There are a number of reasons why the real-time displays can appear blank, as described in the following scenarios:

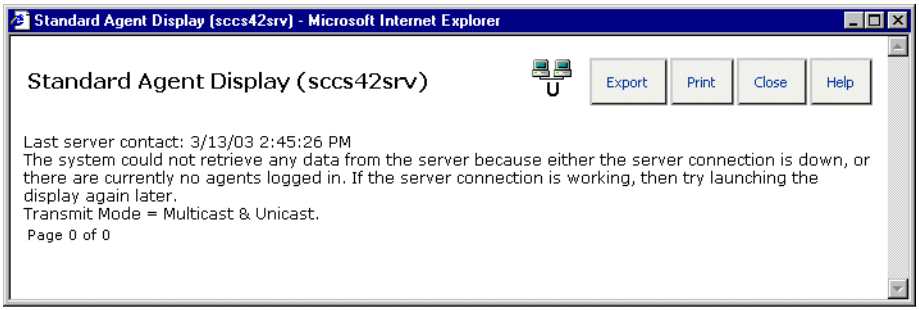
No unicast sessions available

This error normally appears on a client computer when an attempt to open a unicast channel fails and the client is not receiving multicast data. From the error message shown in the following graphic, you can see that the application server supports both multicast and unicast clients, so the implication is that this client is on a unicast-only segment of the network. The absence of a unicast icon indicates that the unicast connection was not successfully established and the client PC is not receiving data packets. In this case, close the display and try to launch it again later.



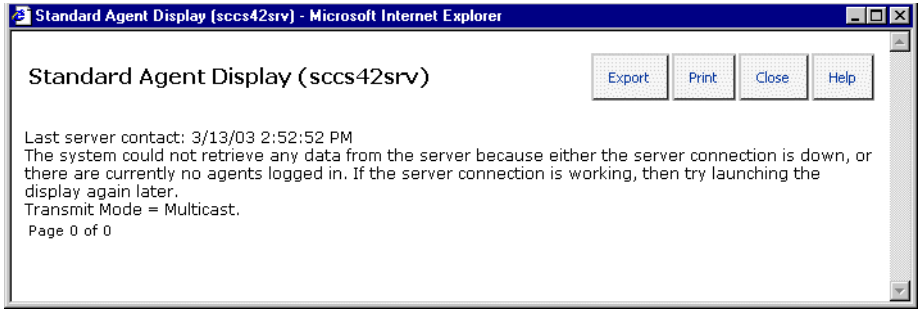
No relevant data

The following window appears on a client computer when it is receiving data, but the data is not relevant for the current display (for example, when the information is not available within the user's partition(s) or the current filter blocks the data from the display). The presence of the unicast icon indicates that a unicast connection was successfully established and the client PC is receiving data packets.



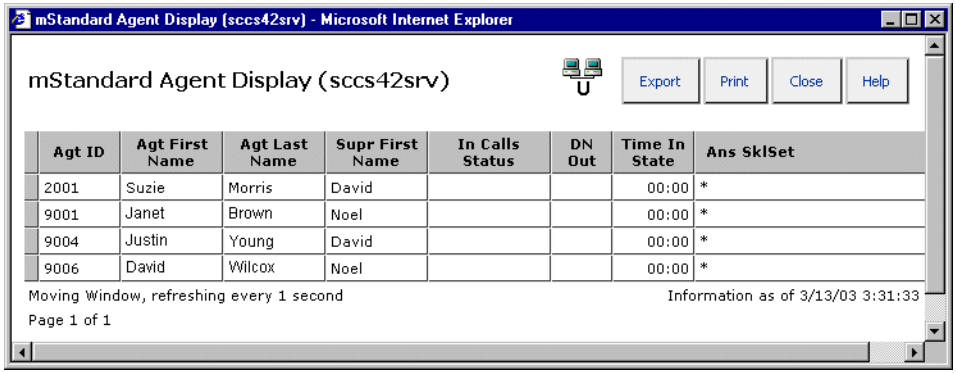
No data is available on the network

This window appears on a client PC when it is not receiving any data. There is no icon at the top of the window, indicating that the display is not receiving any data. The *Transmit Mode = Multicast* note implies that the server only supports multicast, but, in this case, the client PC is not receiving multicast data. This may be the result of a network problem, or it may mean that the server should support unicast, but it has not been enabled. Report the problem to your administrator so that he or she can check the application server settings and enable unicast, if necessary. The administrator may also check the network settings to determine why the client PCs cannot receive multicast data.



The characters “*” and “0” appear in the display

Occasionally, the statistics in a real-time display may stop updating, and the characters “*” and “0” appear instead of the variable fields, as shown in the graphic on page 252. In a unicast environment, this indicates that the server has stopped sending data to this client. You must close and reopen the display. In a multicast environment, this indicates that the server may have stopped sending the multicast stream. Run a trace on the application server if the problem persists.


mStandard Agent Display (sccs42srv) - Microsoft Internet Explorer
mStandard Agent Display (sccs42srv)
Export
Print
Close
Help
Agt ID
Agt First Name
Agt Last Name
Supr First Name
In Calls Status
DN Out
Time In State
Ans SklSet
2001 Suzie Morris David 00:00 *
9001 Janet Brown Noel 00:00 *
9004 Justin Young David 00:00 *
9006 David Wilcox Noel 00:00 *
Moving Window, refreshing every 1 second
Information as of 3/13/03 3:31:33
Page 1 of 1

No names appear in real-time displays

Situation

If the following symptoms appear in your real-time displays, then there may be a problem with the network settings or the configuration of your DNS server, or there may be delays in the network causing timeouts:

- Agent names and answering skillset names appear as **UNKNOWN** in agent real-time displays.
- Route names appear as **UNKNOWN** in route real-time displays.
- IVR queue names appear as **UNKNOWN** in IVR real-time displays.
- Skillset and application names appear incorrectly in skillset and application real-time displays.

Investigation

Ensure that the network is functioning correctly, the DNS has been configured correctly on the application server, and the DNS is providing responses within a reasonable time (for example, less than 10 seconds).

You have display problems on the client PC

Situation

If the layout of the web interface in Symposium Web Client is distorted, follow these steps.

Investigation

To check the display settings of your computer

1. Click Start → Settings → Control Panel.
2. Double-click the **Display** icon.
3. On the Settings tab, drag the slider in the Desktop area box until the value reads at least **1024 x 768** pixels (it cannot be lower than this value).
4. From the Font size drop-down list, select **Small Fonts**.
5. Click **OK** to save your changes.

To set the font size in Internet Explorer

In Internet Explorer, on the View menu, click Text Size → Medium.

To resize the font

If the text or content displayed in Internet Explorer is too large for the window, and you cannot resize the window, do the following:

In Internet Explorer, on the View menu, click Text Size → Smaller or Text Size → Smallest.

Problems while running two sessions on one client PC

Situation

You are running more than one Symposium Web Client session at once on the same client PC and are experiencing difficulty.

Solution

For proper Symposium Web Client functionality, you must not run more than one Symposium Web Client session at any given time on a single client PC. In certain scenarios, if you run more than one session simultaneously on a client PC (with different Web Client users), interference can occur between the sessions. In this situation, you must close all open sessions but one.

Glossary

A

accelerator key

A key on a phoneset that an agent can use to place a call quickly. When an agent presses an accelerator key, the system places the call to the configured number associated with the key. For example, if an agent presses the Emergency key, the system places a call to the agent's supervisor.

access class

A collection of access levels that defines the actions a member of the access class can perform within the system. For example, a member of the Administrator access class might be given a collection of Read/Write access levels.

access level

A level of access or permission given to a particular user for a particular application or function. For example, a user might be given View Only access to historical reports.

ACCESS link

A communication channel between Symposium Call Center Server and CallPilot or Meridian Mail.

ACCESS voice port

A voice port that is controlled by the ACCESS link.

ACD call

See Automatic call distribution call.

ACD-DN

See Automatic call distribution directory number.

ACD group

See Automatic call distribution group.

ACD routing table
See Automatic call distribution routing table.

ACD subgroup
See Automatic call distribution subgroup.

acquired resource
A resource configured on the switch that is under the control of Symposium Call Center Server. Resources must be configured with matching values on both the switch and Symposium Call Center Server.

activated script
A script that is processing calls or is ready to process calls. Before you can activate a script, you must first validate it.

activity code
A number that an agent enters on his or her phoneset during a call. Activity codes provide a way of tracking the time agents spend on various types of incoming calls. They are also known as Line of Business (LOB) codes. For example, the activity code 720 might be used to track sales calls. Agents can then enter 720 on their phonesets during sales calls, and this information can be generated in an Activity Code report.

adapter
Hardware required to support a particular device. For example, network adapters provide a port for the network wire. Adapters can be expansion boards or part of the computer’s main circuitry.

administrator
A user who is responsible for setting up and maintaining Symposium Web Client.

agent
A user who is responsible for handling customer calls.

agent login ID
A unique identification number assigned to a particular agent. The agent uses this number when logging on. The agent ID is not associated with any particular phoneset.

agent to skillset assignment
A matrix that, when you run it, sets the priority of one or more agents for a skillset. Agent to skillset assignments can be scheduled.

agent to supervisor assignment
A definition that, when you run it, assigns one or more agents to specific supervisors. Agent to supervisor assignments can be scheduled.

AIP
Advanced I/O Processor

API
See application program interface.

application
1. A logical entity that represents a Symposium Web Client script for reporting purposes. The Master script and each primary script have an associated application. The application has the same name as the script it represents.
2. A program that runs on a computer.

application program interface
A set of routines, protocols, and tools that programmers use to develop software applications. APIs simplify the development process by providing commonly used programming procedures.

application server
The computer hosting the web server that distributes all the web pages to the client PCs that are using Symposium Web Client. The client PCs use an Internet browser interface to connect to the application server, launch Symposium Web Client, and interact with Symposium Call Center Server. The application software for Symposium Web Client is installed on the application server.

associated supervisor

A supervisor who is available for an agent if the agent's reporting supervisor is unavailable. *See also* reporting supervisor.

Automatic call distribution

A means of automatically distributing an organization's incoming calls among a number of answering positions (ACD agents). Automatic call distribution is useful in operations where callers want a service rather than a specific person. Calls are serviced in the order they arrive and are distributed so that the workload at each answering position is approximately equal.

Automatic call distribution call

A call to an ACD-DN. ACD calls are distributed to agents in an ACD group based on the ACD routing table on the switch. *See also* Automatic call distribution directory number.

Automatic call distribution directory number

A primary or supplementary DN associated with an ACD group. Calls made to an automatic call distribution directory number are distributed to agents belonging to the group, based on the ACD routing table on the switch.

Automatic call distribution group

An entity defined on the switch for the purpose of call distribution. When a customer dials an ACD group, the call is routed to any agent who is a member of that group.

Automatic call distribution routing table

A table configured on the switch that contains a list of ACD-DNs used to define routes for incoming calls. This ensures that incoming calls not processed by Symposium Call Center Server will be queued to ACD groups and handled by available agents.

Automatic call distribution subgroup

An entity defined on the switch to assign supervisory responsibilities. Each subgroup has one supervisor phoneset and a number of agent phonesets associated with it. Agents can log on to any phoneset within their ACD subgroup. The supervisor must log on to the supervisor phoneset to monitor his or her assigned agents.

C

call age
The amount of time a call was waiting in the system before being answered by an agent.

call destination
The site to which an outgoing network call is sent. *See also* call source.

call intrinsic
A script element that stores call-related information assigned when a call enters Symposium Call Center Server. *See also* intrinsic, skillset intrinsic, time intrinsic, traffic intrinsic.

call presentation class
A collection of preferences that determines how calls are presented to an agent**.** A call presentation class specifies whether a break time between calls is allowed, whether an agent can put DN calls on hold for incoming ACD calls, and whether an agent phoneset displays that the agent is reserved for a network call.

call priority
A numerical value assigned in a script that defines the relative importance of a call. If two calls are in the queue when an agent becomes available, and one call is queued with a higher priority than the other, the agent receives the higher priority call first. *See also* skillset priority.

call source
The site from which an incoming network call originates. *See also* call destination.

call treatment
A script element that enables you to provide handling to a call while it is waiting to be answered by a call center agent. For example, a caller can hear a recorded announcement or music while waiting for an agent.

call variable
A script variable that applies to a specific call. A call variable follows the call through the system and is passed from one script to another with the call. *See also* global variable, script variable.

Calling Line Identification

An optional service that identifies the telephone number of the caller. This information can then be used to route the call to the appropriate agent or skillset. The CLID can also be displayed on an agent's phoneset.

CallPilot

A multimedia messaging system you can use to manage many types of information, including voice messages, fax messages, e-mail messages, telephone calls (including conferencing), calendars, and directories.

CDN

See controlled directory number.

CLAN

See Customer local area network.

CLID

See Calling Line Identification.

client

The part of Symposium Call Center Server that runs on a personal computer or workstation and relies on the server to perform some operations. *See also* server.

command

A building block used with expressions, variables, and intrinsics to create scripts. Commands perform distinct functions, such as routing a call to a specific destination, playing music to a caller, or disconnecting a caller.

controlled directory number

A special directory number that allows calls arriving at the switch to be queued when the CDN is controlled by an application such as Symposium Call Center Server. When a call arrives at this number, the switch notifies the application and waits for routing instructions, which are performed by scripts in Symposium Call Center Server.

Customer local area network

The LAN to which your corporate services and resources connect. The Symposium Web Client application server and client PC both connect to the CLAN. Third-party applications that interface with the server also connect to this LAN.

D

DBMS

Database Management System

deactivated script

A script that does not process any new calls. If a script is in use when it is deactivated, calls continue to be processed by the script until they are completed.

default activity code

The activity code that is assigned to a call if an agent does not enter an activity code manually, or when an agent presses the activity code button twice on his or her phoneset.

Each skillset has a defined default activity code.

default skillset

The skillset to which calls are queued if they have not been queued to a skillset or a specific agent by the end of a script.

destination site

The site to which an outgoing network call is sent. *See also* source site.

DHCP

See dynamic host configuration protocol.

Dial-Up Networking

See Remote Access Services.

Dialed Number Identification Service

An optional service that allows Symposium Call Center Server to identify the phone number dialed by the incoming caller. An agent can receive calls from customers calling in on different DNISs and, if the DNIS is displayed on the phoneset, can prepare a response according to the DNIS.

Digital Multiplex Switch
A Nortel Networks switch for the central office market.

directory number
The number that identifies a phoneset on a switch. The directory number (DN) can be a local extension (local DN), a public network telephone number, or an automatic call distribution directory number (ACD-DN).

directory number call
A call that is presented to the DN key on an agent's phoneset.

display threshold
A threshold used in real-time displays to highlight a value below or above the normal range.

DMS
See Digital Multiplex Switch

DN
See directory number.

DN call
See directory number call.

DNIS
See Dialed Number Identification Service.

DNS
See Domain Name System.

domain
A domain represents the portion of a network on which a common security policy applies. A domain's security policy defines the characteristics of passwords, user accounts, and so on.

Domain Name System

The protocols and services on a TCP/IP network that allow network users to use the name of a computer, rather than an IP address, when looking for other computers.

dongle

The attachment plugged into the parallel port of a server connected to a DMS/MSL-100 switch that authenticates the serial number required at the time of server installation.

dynamic host configuration protocol

A protocol for dynamically assigning IP addresses to devices on a network.

dynamic link library

A library of executable functions or data that can be used by a Windows application. Typically, a DLL provides one or more particular functions and a program accesses the functions by creating either a static or dynamic link to the DLL. Several applications can use a DLL at the same time.

E

ELAN

See embedded local area network.

embedded local area network

A dedicated Ethernet TCP/IP LAN that connects the server in Symposium Call Center Server and the switch.

Emergency key

A key on an agent's phoneset that, when pressed by an agent, automatically calls his or her supervisor to notify the supervisor of a problem with a caller.

event

1. An occurrence or action in Symposium Web Client, such as the sending or receiving of a message, the opening or closing of an application, or the reporting of an error. Some events are for information only, while others can indicate a problem. Events are categorized by severity: information, minor, major, and critical. 2. An action generated by a script command, such as queuing a call to a skillset or playing music.

expression

A building block used in scripts to test for conditions, perform calculations, or compare values within scripts. *See also* logical expression, mathematical expression, relational expression.

F

filter

1. In Real-Time Reporting, you create filters by specifying the skillset, application, and agent data that you want to see in the real-time displays. You can apply as many filters as you want to each display. After you apply these filters to the real-time displays, you no longer have to scan data that is not applicable to you. 2. In Historical Reporting, you can select the elements that you want to include in your reports by choosing filters and assigning filter elements to your reports. For example, in an agent performance report, you can choose the filter Agent Login ID, and then choose the filter elements (the logon IDs) that you want to report on.

filter timer

The length of time after the system unsuccessfully attempts to route calls to a destination site, before that site is filtered out of a routing table.

first-level threshold

The value that represents the lowest value of the normal range for a statistic in a threshold class. The system tracks how often the value for the statistic falls below this value.

G

global settings

Settings that apply to all skillsets or IVR ACD-DNs that are configured on your system.

global variable

A variable that contains values that can be used by any script on the system. You can only change the value of a global variable in the Script Variable Properties sheet. You cannot change it in a script. *See also* call variable, variable.

I

IIS
See Internet Information Services.

Interactive voice response
An application that allows telephone callers to interact with a host computer using prerecorded messages and prompts.

Interactive voice response ACD-DN
A directory number that routes a caller to a specific IVR application. An IVR ACD-DN must be acquired for non-integrated IVR systems.

Interactive voice response event
A voice port logon or logoff. An IVR event is pegged in the database when a call acquires or de-acquires a voice port.

Internet Information Services
Microsoft's Web server software. IIS uses Hypertext Transfer Protocol (HTTP) to provide World Wide Web documents in a browser. IIS includes several security functions and allows the use of Gopher and File Transfer Protocol (FTP) servers.

Internet Protocol address
An identifier for a computer or device on a TCP/IP network. Networks use the TCP/IP protocol to route messages based on the IP address of the destination. For customers using NSBR, site IP addresses must be unique and correct. The format of an IP address is a 32-bit numeric address written as four values separated by periods. Each value can be 0 to 255. For example, 1.160.10.240 could be an IP address.

intrinsic
A word or phrase used in a script to gain access to system information about skillsets, agents, time, and call traffic that can then be used in formulas and decision-making statements. *See also* call intrinsic, skillset intrinsic, time intrinsic, traffic intrinsic.

IP address
See Internet Protocol address.

IVR
See Interactive voice response.

IVR ACD-DN
See Interactive voice response ACD-DN.

IVR event
See Interactive voice response event.

IVR port
See voice port.

L

LAN
See Local area network.

Line of Business code
See activity code.

LOB code
See activity code.

Local area network
A computer network that spans a relatively small area. Most LANs connect workstations and personal computers and are confined to a single building or group of buildings.

local call
A call that originates at the local site. *See also* network call.

local skillset
A skillset that can be used at the local site only. *See also* network skillset, skillset.

logical expression
A symbol used in scripts to test for different conditions. Logical expressions are AND, OR, and NOT. *See also* expression, mathematical expression, relational expression.

M

M1
Meridian 1 switch

M1 IE
Meridian 1 Internet Enabled switch

Management Information Base
A data structure that describes the collection of all possible objects in a network. Each managed node maintains one or more variables (objects) that describe its state. Symposium Call Center Server Management Information Bases (MIBs) contribute to the overall network MIB by

- identifying Nortel Networks/Meridian/Symposium Call Center Server nodes within the network
- identifying significant events (SNMP traps), such as alarms reporting
- specifying formats of alarms

Master script
The first script executed when a call arrives at Symposium Call Center Server. A default Master script is provided with Symposium Web Client, but it can be customized by an authorized user. It can be deactivated but not deleted. *See also* network script, primary script, script, secondary script.

mathematical expression
An expression used in scripts to add, subtract, multiply, and divide values. Mathematical expressions are addition (+), subtraction (-), division (/), and multiplication (*). *See also* expression, logical expression, relational expression.

Meridian Link Services
A communications facility that provides an interface between the switch and a third-party host application.

Meridian Mail
A Nortel Networks product that provides voice messaging and other voice and fax services.

Meridian MAX
A Nortel Networks product that provides call processing based on ACD routing.

MIB
See Management Information Base.

MLS
See Meridian Link Services.

MM
See Meridian Mail.

MSL-100
Meridian Stored Logic 100 switch

music route
A resource installed on the switch that provides music to callers while they wait for an agent.

N

NACD call
A call that arrives at the server from a network ACD-DN.

NCC
See Network Control Center.

network call
A call that originates at another site in the network. *See also* local call.

Network Control Center
The server in a Symposium Call Center Server system where NSBR is configured and where communication between servers is managed.

network interface card
An expansion board that enables a PC to be connected to a local area network (LAN).

network script
The script that is executed to handle error conditions for Symposium Call Center Server calls forwarded from one site to another, for customers using NSBR. The network script is a system-defined script provided with Symposium Web Client, but it can be customized by an authorized user. It can be deactivated but not deleted. *See also* Master script, primary script, script, secondary script.

Network Skill-Based Routing
An optional feature with Symposium Call Center Server that provides skill-based routing to multiple networked sites.

network skillset
A skillset that is common to every site on the network. Network skillsets must be created at the Network Control Center (NCC).

night mode
A skillset state in which the server does not queue incoming calls to the skillset, and in which all queued calls are given night treatment. A skillset goes into night mode automatically when the last agent logs off, or the administrator can put it into night mode manually. *See also* out-of-service mode, transition mode.

NPA
See Number Plan Area.

NSBR
See Network Skill-Based Routing.

Number Plan Area
Area code

O

object linking and embedding
A compound document standard that enables you to create objects with one application and then link or embed them in a second application.

ODBC
See Open Database Connectivity.

OEM
Original equipment manufacturer

OLE
See object linking and embedding.

Open Database Connectivity
A Microsoft-defined database application program interface (API) standard.

out-of-service mode
A skillset state in which the skillset does not take calls. A skillset is out of service if there are no agents logged on or if the supervisor puts the skillset into out-of-service mode manually. *See also* night mode, transition mode.

out-of-service skillset
A skillset that is not taking any new calls. While a skillset is out of service, incoming calls cannot be queued to the skillset. *See also* local skillset, network skillset, skillset.

P

partition
Partitions enable call center administrators to control the data that Symposium Web Client users can view and manage in Historical Reporting, Real-Time Reporting, and Contact Center Management. Partitions can contain six types of data: agents, skillsets, applications, CDNs, DNISs, and report groups. If an administrator does not assign a partition to a user, then the user sees all available data in the real-time displays and historical reports. However, if the administrator does not assign a partition to a supervisor containing agents, then the supervisor sees nothing in Contact Center Management.

PBX
See private branch exchange.

pegging
The action of incrementing statistical counters to track and report on system events.

pegging threshold
A threshold used to define a cut-off value for statistics, such as short call and service level. Pegging thresholds are used in reports.

PEP
See Performance Enhancement Package.

Performance Enhancement Package
A Symposium Call Center Server supplementary software application that enhances the functionality of previously released software by improving performance, adding functionality, or correcting a problem discovered since the original release.

personal directory number
A DN on which an agent can be reached directly, usually for private calls.

phoneset
The physical device, connected to the switch, to which calls are presented. Each agent and supervisor must have a phoneset.

phoneset display
The display area on an agent's phoneset where information about incoming calls can be communicated.

Position ID
A unique identifier for a phoneset, used by the switch to route calls to the phoneset. Referred to as Telephony/Port Address in Symposium Call Center Server.

primary ACD-DN
A directory number that callers can dial to reach an ACD group.

primary script
A script that is executed or referenced by the Master script. A primary script can route calls to skillsets, or it can transfer routing control to a secondary script. *See also* Master script, network script, script, secondary script.

private branch exchange
A telephone switch, typically used by a business to service its internal telephone needs. A PBX usually offers more advanced features than are generally available on the public network.

R

RAID
See Redundant Array of Intelligent/Inexpensive Disks.

RAN
recorded announcement

RAN route
See recorded announcement route.

RAS
See Remote Access Services.

recorded announcement route
A resource installed on the switch that offers a recorded announcement to callers.

Redundant Array of Intelligent/Inexpensive Disks
A category of disk drives that employs two or more drives in combination for fault tolerance and performance.

relational expression
An expression used in scripts to test for different conditions. Relational expressions are less than (<), greater than (>), less than or equal to (< =), greater than or equal to (> =), and not equal to (< >). *See also* expression, logical expression, mathematical expression.

Remote Access Services
A feature built into Windows NT and Windows 95 that enables users to log on to an NT-based LAN using a modem, X.25 connection, or WAN link. This feature is also known as Dial-Up Networking.

report group

1. The *standard* report groups in Historical Reporting are folders that contain the standard report templates. There are six standard report groups: Agent Performance, Configuration, Call-by-Call, Networking (M1 networking only), Others, and NCC (on the NCC only). 2. An administrator creates *custom* report groups in Access and Partition Management, adds them to partitions, and assigns the partitions to Historical Reporting users. Custom report groups do not contain standard report templates. Instead, they are folders that enable users who belong to the same group to share customized reports. Users can customize a standard template and save it in their group folder so that other members of their group can use the same customized report.

reporting supervisor

The supervisor who has primary responsibility for an agent. When an agent presses the Emergency key on the phoneset, the emergency call is presented to the agent's reporting supervisor. *See also* associated supervisor.

round robin routing table

A routing table that queues the first call to the first three sites in the routing table, then the second three sites, then the third three sites, and so on, until an agent is reserved at one of the sites. *See also* sequential routing table.

route

A group of trunks. Each trunk carries either incoming or outgoing calls to the switch. *See also* music route, RAN route.

router

A device that connects two LANs. Routers can also filter messages and forward them to different places based on various criteria.

routing table

A table that defines how calls are routed to the sites on the network. *See also* round robin routing table, sequential routing table.

S

sample script
A script that is installed with the Symposium Call Center Server client. Sample scripts are stored as text files in a special folder on the client. The contents of these scripts can be imported or copied into user scripts to create scripts for typical call center scenarios.

SCM
See Service Control Manager.

script
A set of instructions that relates to a particular type of call, caller, or set of conditions, such as time of day or day of week. *See also* Master script, network script, primary script, secondary script.

script variable
See variable.

second-level threshold
The value used in display thresholds that represents the highest value of the normal range for a given statistic. The system tracks how often the value for the statistic falls outside this value.

secondary directory number
A DN defined on the agent's phoneset as a Centrex line for incoming and outgoing non-ACD calls.

secondary script
Any script (other than a Master, network, or primary script) that is referenced from a primary script or any other secondary script. There is no pegging of statistics for actions occurring during a secondary script. *See also* Master script, network script, primary script, script.

sequential routing table
A routing table method that always queues a call to the first three active sites in the routing table. *See also* round robin routing table.

server

A computer or device on a network that manages network resources. Examples of servers include file servers, print servers, network servers, and database servers. Symposium Call Center Server is used to configure the operations of the call center. *See also* client.

service

A process that adheres to a Windows NT structure and requirements. A service provides system functionality.

Service Control Manager

A Windows NT process that manages the different services on the PC.

service level

The percentage of incoming calls answered within a configured number of seconds.

service level threshold

A parameter that defines the number of seconds within which incoming calls should be answered.

Simple Mail Transfer Protocol

A TCP/IP protocol used to send messages from one computer to another on a network. This protocol is commonly used to determine the route for e-mail.

Simple Network Management Protocol

A systematic way of monitoring and managing a computer network. The SNMP model consists of four components:

- managed nodes, which are any device, such as hosts, routers, and printers, capable of communicating status to the outside world via an SNMP management process called an SNMP Agent
- management stations, which are computers running special network management software that interact with the Agents for status
- management information, which is conveyed through exact specifications and format of status specified by the MIB
- Management Protocol or SNMP, which sends messages called protocol data units (PDUs)

site
1. A system using Symposium Call Center Server that can be accessed using SMI. 2. A system using Symposium Call Center Server and participating in Network Skill-Based Routing.

skillset
A group of capabilities or knowledge required to answer a specific type of call. *See also* local skillset, network skillset.

skillset intrinsic
A script element that inserts information about a skillset in a script. Skillset intrinsics return values such as skillsets, integers, and agent IDs. These values are then used in queuing commands. *See also* call intrinsic, intrinsic, time intrinsic, traffic intrinsic.

skillset priority
An attribute of a skillset assignment that determines the order in which calls from different skillsets are presented to an agent. When an agent becomes available, calls might be waiting for several of the skillsets to which the agent belongs. The server presents the call queued for the skillset for which the agent has the highest priority.

SMTP
See Simple Mail Transfer Protocol.

SNMP
See Simple Network Management Protocol.

source site
The site from which an incoming network call originates. *See also* destination site.

standby
In skillset assignments, a property that grants an agent membership in a skillset, but makes the agent inactive for that skillset.

supervisor
A user who manages a group of agents. *See also* associated supervisor, reporting supervisor.

supplementary ACD-DN
A DN associated with a primary DN. Any calls to the supplementary DN are automatically routed to the primary DN. A supplementary DN can be a toll-free (1-800) number.

switch
The hardware that receives incoming calls and routes them to their destination.

switch resource
A device that is configured on the switch. For example, a CDN is configured on the switch, and then is used as a resource with Symposium Call Center Server. *See also* acquired resource.

Symposium Call Center Server call
A call to a CDN that is controlled by Symposium Call Center Server. The call is presented to the Incalls key on an agent's phoneset.

system-defined scripts
The Master_Script and the Network_Script (if NSBR is enabled). These scripts can be customized or deactivated by a user, but cannot be deleted. These scripts are the first scripts executed for every local or network call arriving at the call center.

T

target site
See destination site.

TCP/IP
See Transmission Control Protocol/Internet Protocol.

telephony

The science of translating sound into electrical signals, transmitting them, and then converting them back to sound. The term is used frequently to refer to computer hardware and software that perform functions traditionally performed by telephone equipment.

Terminal services

An application that allows many computers to connect to a host computer, allowing input and output between the connected computer and its host.

threshold

A value for a statistic at which system handling of the statistic changes.

threshold class

A set of options that specifies how statistics are treated in reports and real-time displays. *See also* display threshold, pegging threshold.

time intrinsic

A script element that stores information about system time, including time of day, day of week, and week of year. *See also* call intrinsic, intrinsic, skillset intrinsic, traffic intrinsic.

Token Ring

A PC network protocol developed by IBM. A Token Ring network is a type of computer network in which all the computers are arranged schematically in a circle.

traffic intrinsic

An intrinsic that inserts information about system-level traffic in a script. *See also* call intrinsic, intrinsic, skillset intrinsic, time intrinsic.

transition mode

A skillset state in which the server presents already queued calls to a skillset. New calls queued to the skillset are given out-of-service treatment. *See also* night mode, out-of-service mode.

Transmission Control Protocol/Internet Protocol

The communication protocol used to connect devices on the Internet. TCP/IP is the standard protocol for transmitting data over networks.

treatment

See call treatment.

trunk

A communications link between a PBX and the public central office, or between PBXs. Various trunk types provide services such as Direct Inward Dialing (DID trunks), ISDN, and Central Office connectivity.

U

user-created script

A script that is created by an authorized user on the Symposium Web Client system. Primary and secondary scripts are user-created scripts.

user-defined script

A script that is modified by an authorized user on the Symposium Web Client system.

utility

A program that performs a specific task, usually related to managing system resources. Operating systems contain a number of utilities for managing disk drives, printers, and other devices.

V

validation

The process of checking a script to ensure that all the syntax and semantics are correct. A script must be validated before it can be activated.

variable

A placeholder for values calculated within a script, such as CLID. Variables are defined in the Script Variable Properties sheet and can be used in multiple scripts to determine treatment and routing of calls entering Symposium Call Center Server. *See also* call variable, global variable.

voice port

A connection from a telephony port on the switch to a port on the IVR system.

W

WAN

See also Wide area network.

Wide area network

A computer network that spans a relatively large geographical area. Typically, a WAN consists of two or more local area networks (LANs). The largest WAN in existence is the Internet.

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Reader Response Form

Nortel Networks Symposium Call Center Web Client
Supervisor's Reference Guide
Product release 4.5/SU03

Tell us about yourself:

Name: _____

Company: _____

Address: _____

_____

Occupation: _____ **Phone:** _____

1. What is your level of experience with this product?

   ☐ New user ☐ Intermediate ☐ Experienced ☐ Programmer

2. How do you use this book?

   ☐ Learning ☐ Procedural ☐ Reference ☐ Problem solving

3. Did this book meet your needs?

   ☐ Yes ☐ No

   If you answered No to this question, please answer the following questions.

4. What chapters, sections, or procedures did you find hard to understand?

   _____

   _____

   _____

5. What information (if any) was missing from this book?

   _____

   _____

   _____

6. How could we improve this book?

   _____

   _____

Please return your comments by fax to 353-91-756050, or mail your comments to Contact Center Documentation Research and Development Prime, Nortel Networks, Mervue Business Park, Galway, Ireland.

NORTEL NETWORKS™

Reader Response Form

Reader Response Form

Nortel Networks Symposium Call Center Web Client

Supervisor's Reference Guide

Nortel Networks
Mervue Business Park
Galway, Ireland

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