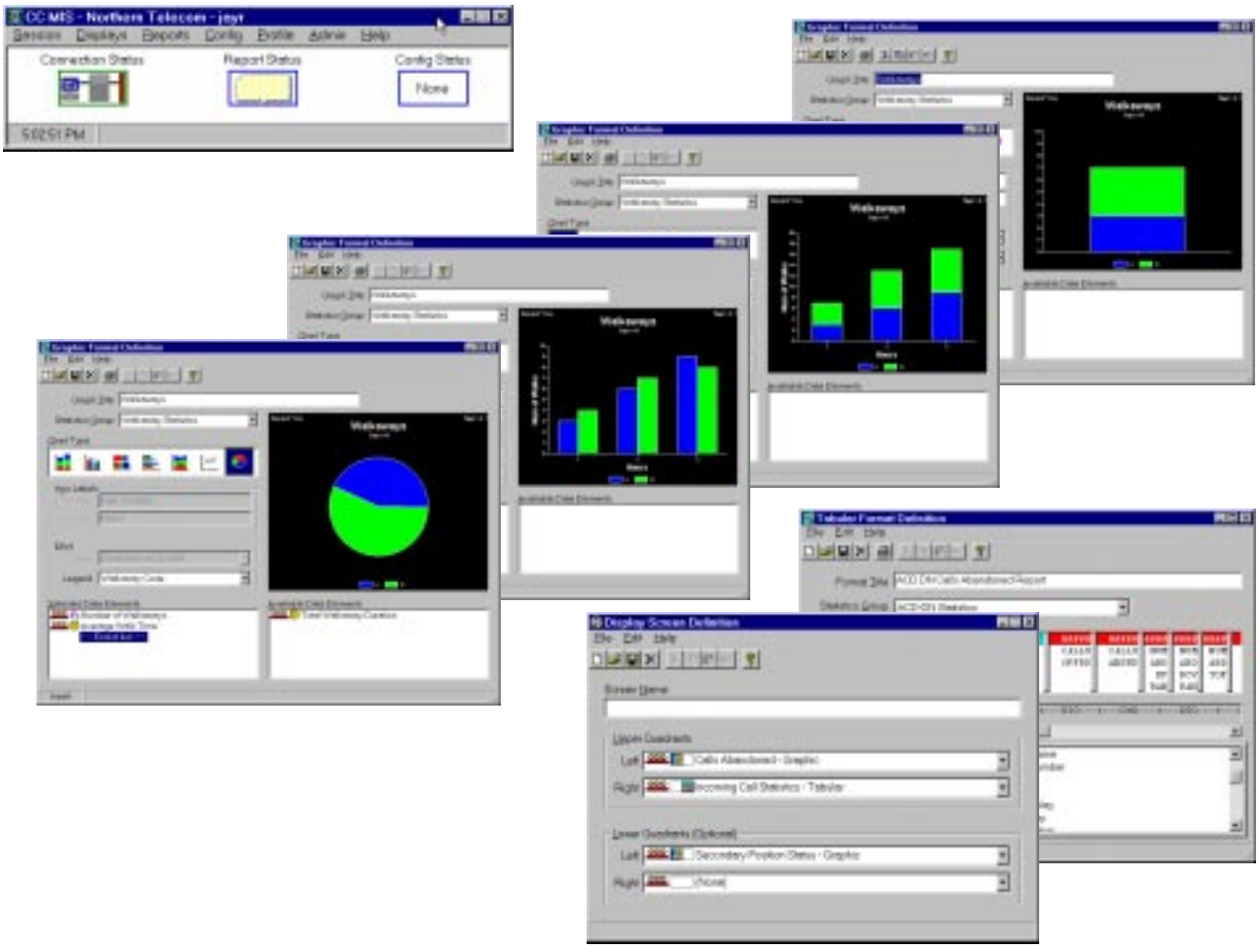
Call Center Management Information System

CC MIS Release 4.1

CC MIS Getting Started Guide

Standard 297-2671-175.04.02



Quick Start Guide
Supervisor's Interface

NORTEL
NORTHERN TELECOM

CC MIS Getting Started Guide

Quick Start in the Supervisor's Interface

CC MIS Release 4.1

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Contents

About this Guide

This is the Getting Started Guide for CC MIS (NTP 297-2671-175). This guide should be used in conjunction with other NTPs issued in support of CC MIS.

audience and scope

This guide is intended to be used by supervisors who are new to the CC MIS product. It provides these users with the basic steps and information needed to gain quick access to all of the major functions available to a supervisor terminal.

This guide is intended to provide a quick overview of the CC MIS Supervisor's interface. For a more detailed explanation of CC MIS functions, refer to the CC MIS Online Help.

This guide does not cover the System Administration functions which are accessed using the Admin command. Information concerning the use of these functions is presented in the CC MIS Online Help which is accessed from any window in the CC MIS product.

new features in release 4

The following features are present in the Supervisor Interface for CC MIS Release 4:

- ***Networked CC MIS Real-Time Statistics -*** Changes to load management and real-time statistics and screens to allow for the consolidated viewing of data from all partitions in a CC MIS network. This enhancement also allows network supervisors to perform the same load management functions as local supervisors. The Configuration Control screens display a Node field and the Insert windows allow for selection of a node, then the insertion of groups on that node.
- ***Networked CC MIS Historical Statistics -*** Reporting capability has been enhanced to allow the generation of reports that contain data from multiple CC MIS nodes. This network enhancement is available to supervisors who are logged into a Network Access Partition (NAP).

- ***Windows completion -*** All remaining emulation mode windows have been converted to a true Windows interface.
- ***Increased Capacities -*** The following capacities have been increased: ACD groups to 512, Supplementary DNs to 8704, Number of Agents to 5000, and number of agent IDs to 9999.
- ***Agent location by Login ID -*** Provides a Find command in the agent status display to locate an agent or position in the display.
- ***Walkaway Code Treatment*** - A new field was added to the Walkaway Code Definition window that allows you to specify if a walkaway code is to be pegged and reported as not ready or walkaway time.
- ***Multiple DN key support -*** CC MIS now correctly reports on positions with up to 2 simultaneous secondary DN calls active.
- ***Additional Shift and 24 hr statistics*** - Several new Shift and 24 hr statistics were added to the CC MIS product. The following new statistics are for both Shift and 24hr:

  - MAX TOF DELAY

  - MAX ANS DELAY

  - MAX ABD DELAY

  - TOT TOF DELAY

- ***Enhanced Wallboard support -*** The wallboard interface has been enhanced to support multi-line messages, multi-color characters, and visual and audible alarms. These enhancements can be used on the new Spectrum Wallboards. Three wallboard models supported in Release 4.0 are: Nortel (Spectrum), Daktronics, and generic.
- ***Walkaway Statistics by agent*** - The walkaway statistic has been enhanced to allow storage of walkaway statistics by agent or by ACD group. This enhancement also affects Walkaway reporting by allowing you to specify an agent or agent(s) to be included in the Walkaway report.
- ***Report Services*** - The Reporting feature in CC MIS has been enhanced to allow tabular reports to be sent to electronic mail addresses, or faxed. These enhanced options are in addition to printing to a file, or directing the report to a printer. (Note: The e-mail and fax capabilities require Microsoft Exchange™.) A Report Status Logs window was added to allow you to view the status all requested reports.
- ***Printing of Graphic Reports*** - Graphic reports can only be printed to PC-attached printers.
- ***Configurable Intervals*** - Flexible intervals can be defined in the Maintenance Interface in intervals of 5, 10, 15, 30, and 60 minutes or turned off. Interval settings can be viewed in the Supervisor Interface from the Reports menu on the Report Parameters window.
- ***Color Customization*** - On systems that support more than 256 colors, the Color Maps in the Color Selection dialogs for both printers and displays will allow customization of the colors. The Color dialog is accessed by clicking on the Customize button that will be displayed on the Color Selection window.

The following interface has been removed in Release 4.0:

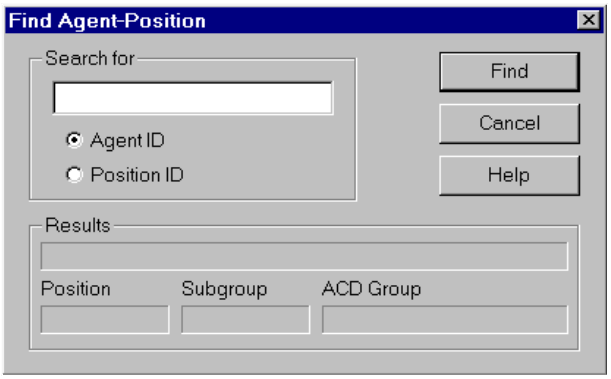
- ***Text Interface*** - The Text interface is no longer supported.

A Closer Look at Some New Features

Below are some key features found in the Supervisor's Interface.

Locating an Agent or Position

In Release 4, you can locate and agent or position using the View / Find command on from the Agent Status window. The Find Agent-Position dialog is shown below.

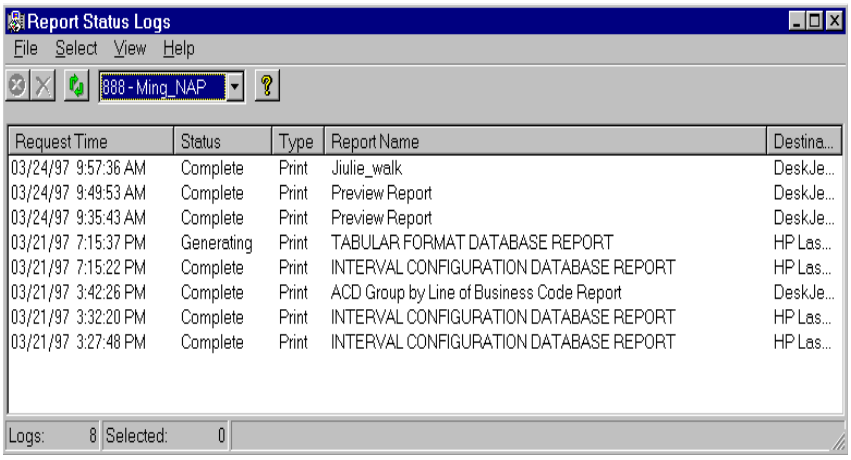


Tracking of Dual DN keys

In Release 4, you can view the status of two DN keys. This option is activated using the Preferences/Dual DN Status option. When activated, a second timer for the second DN is displayed.

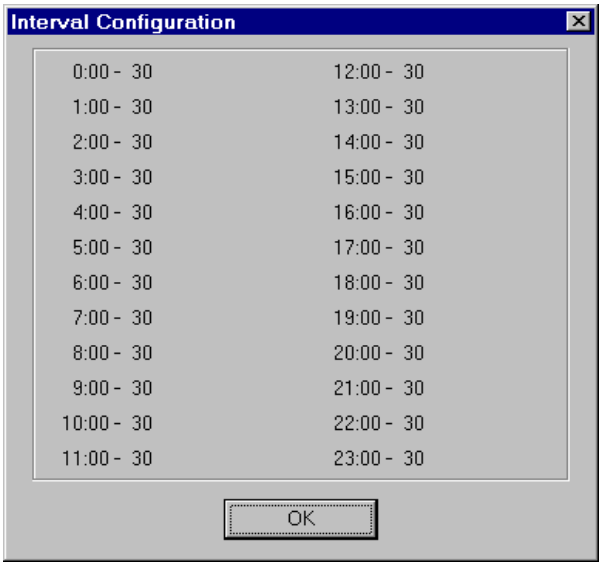
Report Status / Cancelling Pending Reports

After a report is requested, the status of the report can be viewed or the pending report cancelled using the Report status logs window. This window is accessed from the Reports menu on the CC MIS Main window.



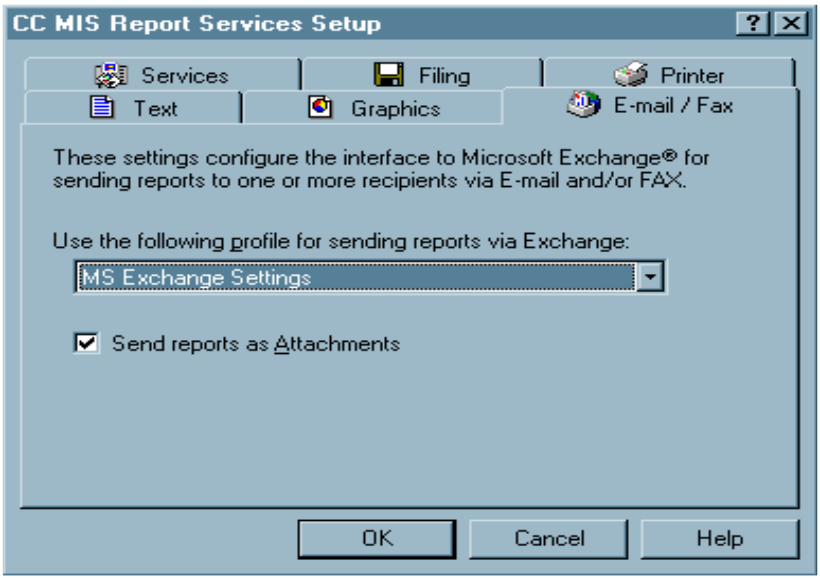
Interval Configuration

Intervals for each hour of the day are configured in the Maintenance Interface. The intervals used by your partition can be viewed while in the Report Parameters Definition window by selecting the Reports / Intervals command. The Interval Configuration dialog is displayed. Intervals that are allowed in Release 4.0 are: 5, 10, 15, 30, and 60 minutes.



Report Services: E-Mail and Fax Capabilities

If Microsoft Exchange™ is available on your PC, You can use the E-Mail/ Fax tab in the Report Services window to setup your system to send reports using e-mail or fax to one or more recipients. The Report Services window is accessed using the Session / Setup/ Report Services.

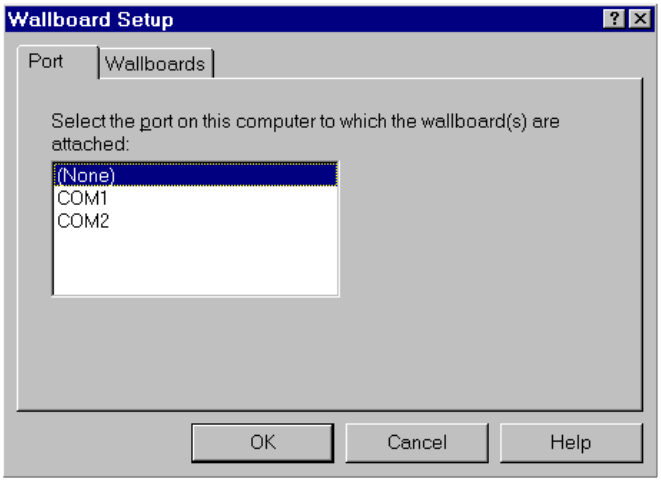


PC-Attached Wallboards

Wallboards can now be attached to the Supervisor's PC. Wallboards supported in Release 4 include: Nortel, Daktronics, and generic.

Note: Only Nortel wallboards can be connected as PC-attached wallboards.

Use the Session / Setup / Wallboards command to access the Wallboard Setup window.



Windows Basics

Introduction

This chapter provides information on using the mouse, windows, and menus when running the CC MIS windows interface.

How to begin

If you are new to using a Windows interface, you need to become familiar with this environment. You should proceed through each section in this chapter. You should also complete the Windows tutorial which is accessed from the Help menu on the Start button in Windows 95.

If you have used the Windows interface and are already familiar with pulldown menus and mouse operations, you can skip this chapter.

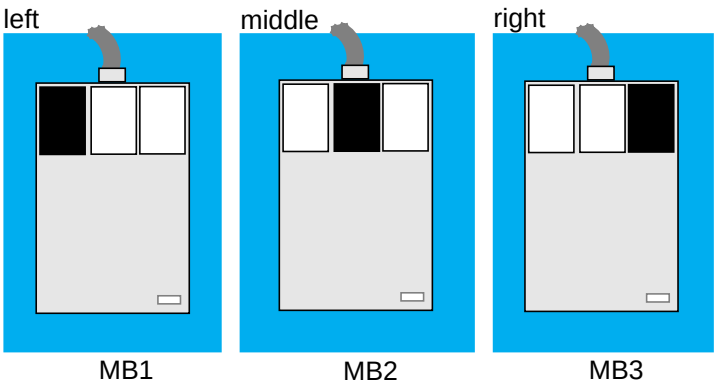
In Windows, menu options are selected from pulldown menus. Screens can be sized and multiple screens can be displayed at the same time. A mouse can be used (instead of the keyboard) to select fields and menu items. These topics are discussed in the following paragraphs.

Using the mouse

The mouse is a tool that is used to select menu options and fields on the screen. In essence, the mouse allows you to simply point and click to make a selection. The mouse shown in the illustration in the figure below is a three button mouse.

The names of the buttons are: left, middle, and right. The mouse button designations are: left = MB1, middle = MB2, and right = MB3. Most of the steps in this guide refer to the mouse designations (for example, click MB1 on the...).

Three button mouse



Two Button Mouse: Button designations on a two button mouse are: Left (MB1) and Right (MB2). MB3 is not used in CC MIS.

Key terms

Procedures in this guide are presented in steps. Within these steps you may be instructed to double-click MB1 or press MB1 and drag the mouse. When using a mouse you will need to know the terms listed below:

Pressing - Pushing and holding down a mouse button

Clicking - Quickly pressing and releasing the mouse button

Dragging - Pressing a mouse button while moving the mouse

Moving - Moving the mouse without pressing a button

Releasing - Letting go of the mouse button

Double-Clicking - Quickly pressing and releasing the mouse button twice

A Windows term you need to know is:

Focus - The area or window on the display that is active to input

Mouse cursor

The mouse has a cursor (pointer) that indicates its position on the screen. This mouse cursor is displayed in the shape of an arrow (for example,). When the mouse is moved, the mouse cursor moves in the same direction across the screen.

steps

Selecting a field with the mouse

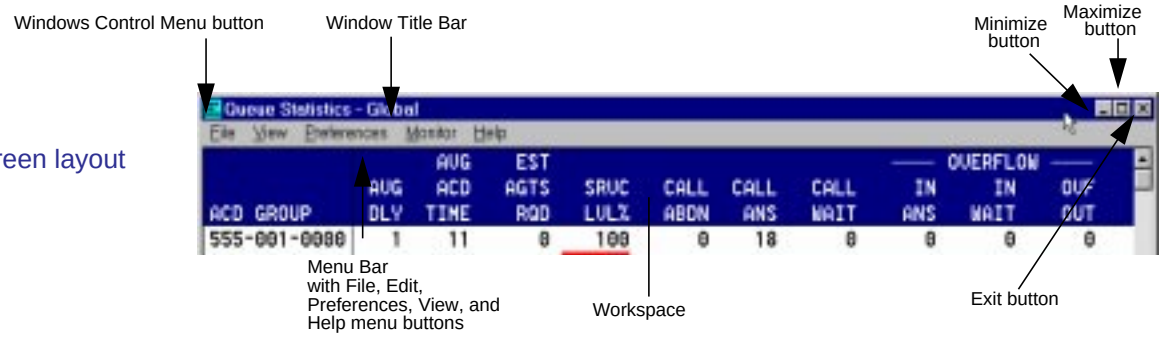
To select a field using the mouse:

1. Move the mouse cursor to the field to be selected.
2. With the cursor position over the desired field, click MB1.
3. The cursor is now located within the selected field.

Screen layout and components

Screens in the Windows interface may contain a title bar, menu bar, window menu button, help button, maximize and minimize buttons, and workspace. A typical CC MIS screen layout and components are shown below.

Screen layout



Description of components

The following descriptions refer to the components identified in Figure 1-2.

Title Bar - Contains the title of the window. Click MB1 in this area of the screen to bring this window to the front (move in focus).

Menu Bar - Contains the menu buttons (names) for this window. Click MB1 on a menu button to view the associated pulldown menu and options.
(Note: Not all screens have menus.)

Help - Click MB1 on the Help menu button to view Help information.

Window menu - This menu is used to effect the screen properties (such as size) and for moving the screen. This menu is also known as the Control menu.

Minimize - Click on this button to iconify the window.
Maximize - Click on this button to increase the size of the screen to fill the entire display area.

Workspace - The area where the data is displayed and inputs are made.

Using scroll bars

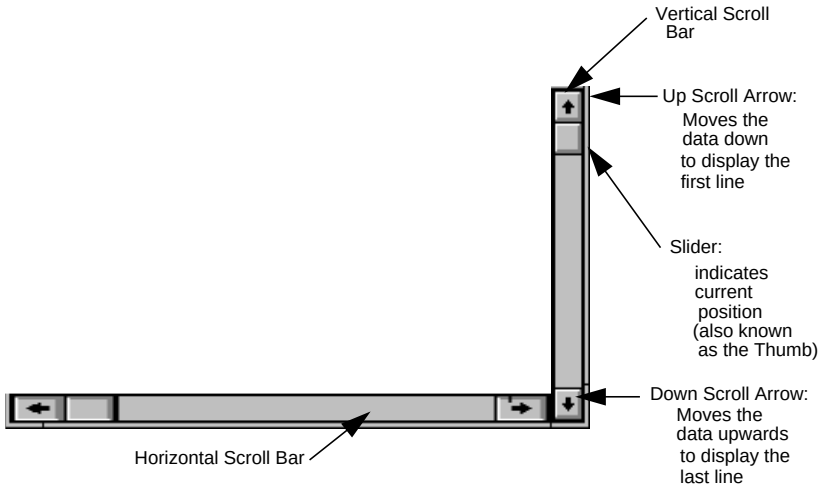
Scroll bars allow you to view data that may be hidden due to the limitations of a screen size. This happens when the contents of the screen are larger than the screen itself. When this occurs, scroll bars appear on the display to allow you to gain access to the hidden information.

By pressing MB1 on the arrow on top of the scroll bar, the contents of the screen move downward until the first line or portion of the screen is displayed. (Clicking, instead of pressing, the mouse causes the information to move one step.)

Pressing MB1 on the bottom arrow causes the data in the Workspace of the screen to move upwards, revealing hidden data.

The components of a scroll bar are shown in below.

Scroll bars



Viewing pulldown menus

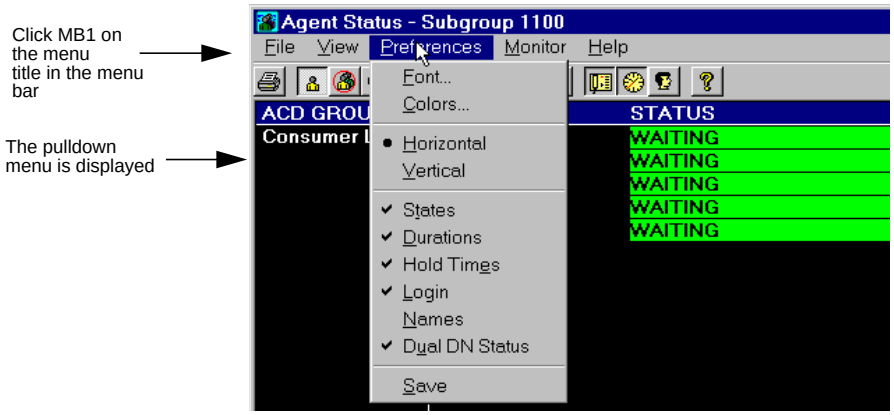
Commands and options are selected from pulldown menus. These menus are displayed by clicking MB1 on the associated menu button.

Selection from menu bar

The menu bar contains menu titles. When present, the selection of a menu title causes an associated pulldown menu to appear. The pulldown menu contains commands and available options.

The menu bar, menu titles, and pulldown menu are shown below.

Viewing pulldown menus

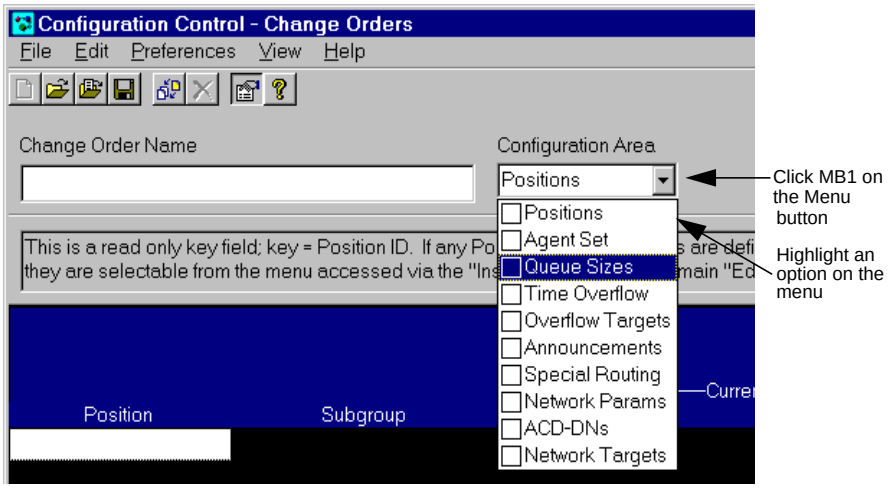


Selection from within screen (workspace menu button)

Some of the Configuration Control windows in CC MIS have menu buttons located within the workspace of the screen. Selecting the menu title results in an associated pulldown menu being displayed. This type of pulldown usually contains valid entries or ranges for a particular field.

The workspace menu button and pulldown menu are shown below.

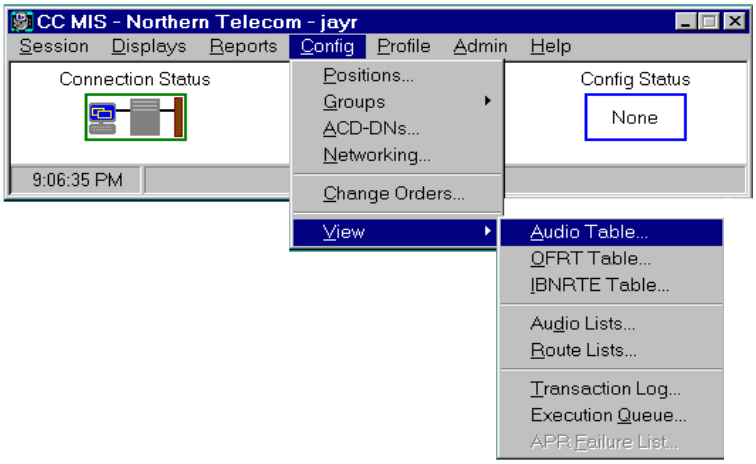
Viewing workspace pulldown menus



Cascade menus

Some menu items have an right arrow next to the option name. This indicates that selection of this option will result in a second (cascade) menu being displayed. An example of a cascade menu is shown below.

Cascade menus



Keyboard accelerators

Some menu items have accelerators next to the option name. Accelerators are key sequences that can be entered from the keyboard to execute that option or command. In CC MIS, most keyboard accelerators are the underlined letters (for example, on the Admin button, the accelerator is A).

Pressing the Alt key on your keyboard and the A key displays the Admin drop down menu.

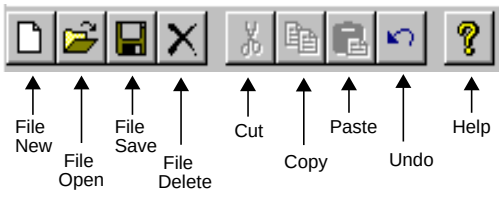
Dialog box

Some menu items have three periods next to the option name. This indicates that selection of this option will result in a dialog box or secondary screen being displayed. Dialog boxes are used to provide the additional information to the user and require a response in the form of clicking on an OK or Cancel button. Some dialog boxes request the user to input additional information or to select an item.

Tool Bar

A tool bar appears on some of the screens in CC MIS. The icons in the tool bar serve as short cuts to access menu functions. Typical icons are:

Button functions are displayed by placing the cursor on the button.



Online Help Screens

Introduction

Help is available from any window within the CC MIS. The help system provides information about using the CC MIS product and its screens to perform functions.

Accessing the help function

The steps listed below explain how to enter the Help function.

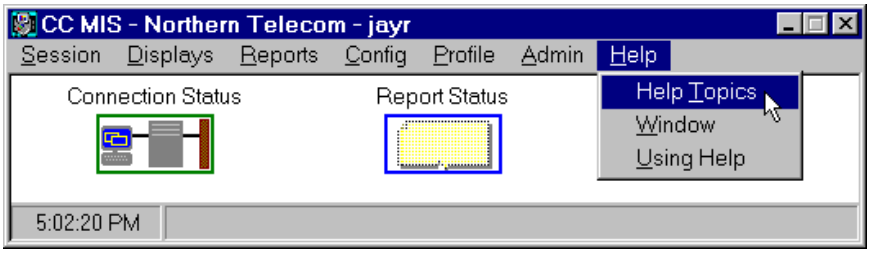
steps **How to enter the Help function**

1. On the CC MIS Main window, select **Help / Help Topics.**
2. The index window for the Help function appears.

Help options

There are three options: Help Topics, Window, and Using Help. The figure below shows the Help menu selected on the CC MIS Main menu.

Help menu

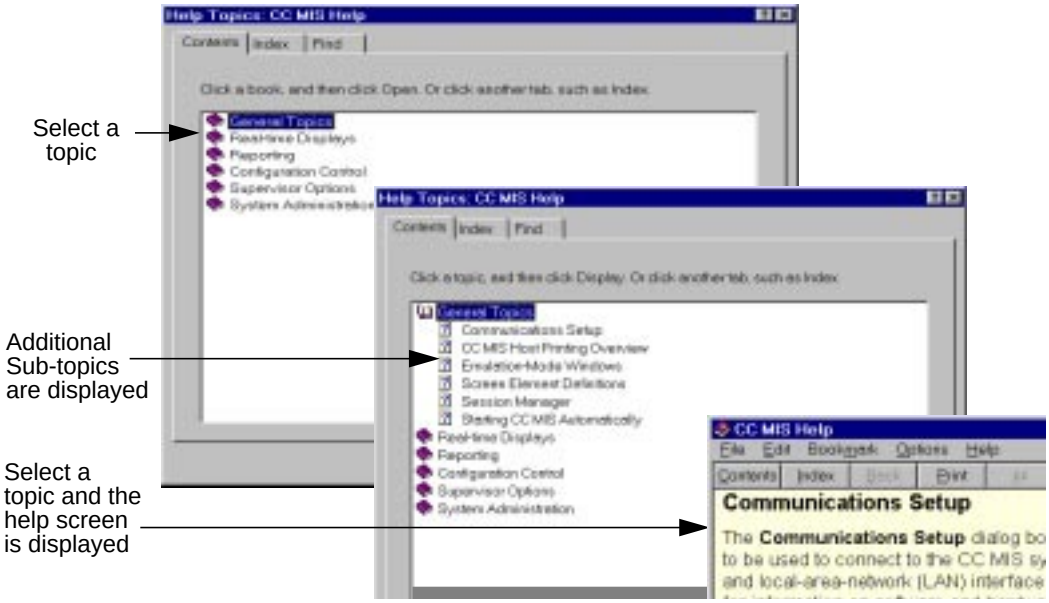


The three help options are described below.

Help Topics

Selection of the Help Topics option causes the screen in the figure below to appear.This window contains a listing of all of the Help topics available for CC MIS. Help topics are nested. Double-click on one of the options and additional topics related to the one selected are listed under that topic. Select a sub-topic and a help screen appears containing information on that topic.

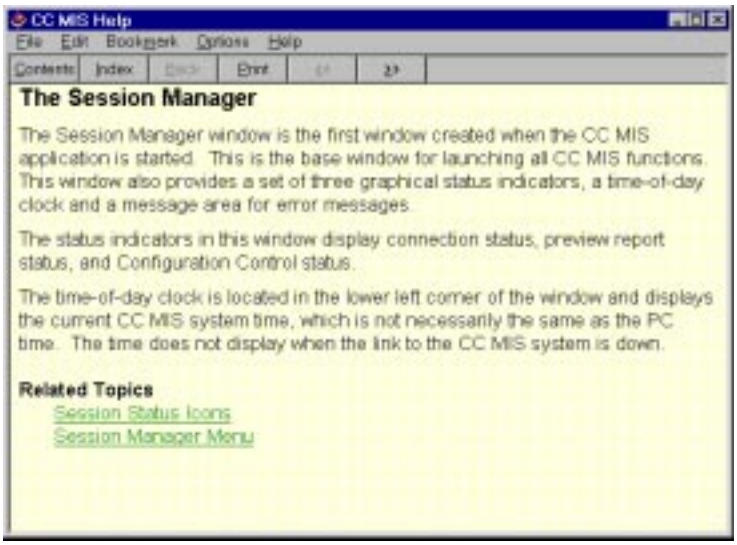
Help index screen



Window

Selecting the Window option from the Help menu causes a screen to appear containing information specific to the window currently displayed on your terminal. An example of this screen is shown below.

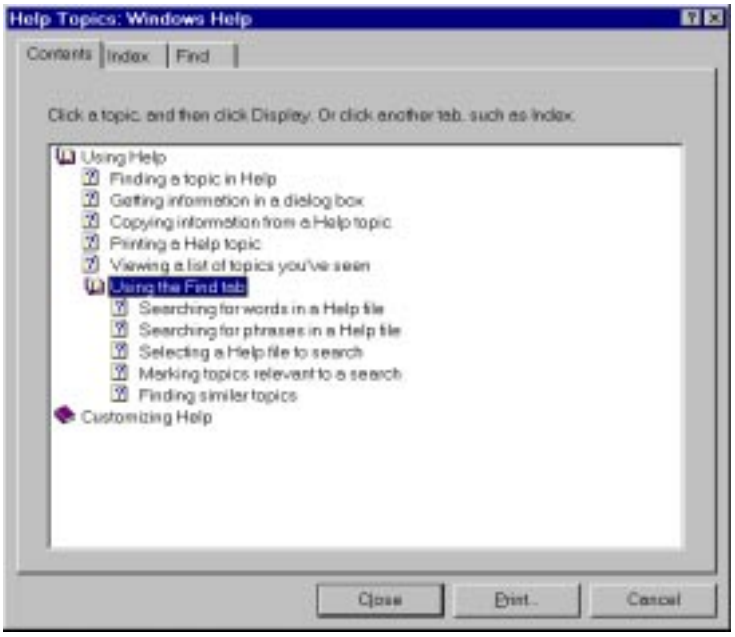
Help on window



Using Help

Selecting the Using Help option from the Help menu causes a screen to appear containing information concerning the procedures specific to the function that is opened. An example of this screen is shown below.

Using Help screen



This screen provides access to information on how to use the Windows help function. It also allows for the customization of the help screens.

3

Logging into CC MIS

Introduction

This chapter provides information on logging in and out of CC MIS.

A key step in learning to use CC MIS is learning how to log in and log out of the supervisor terminal.

Logging in

Supervisors with profiles established in CC MIS can log in to any supervisor position. Only one session per supervisor ID can run at a time. If you are logged into one position and you try to log in at a different position, you must either override your original login, causing the CC MIS system to log you out of the original session; or cancel your login attempt and return to the position at which you are already logged in. The steps below guide you through the login onto the CC MIS terminal.

steps Logging in to CC MIS

This is a sample icon. The name of the icon on your desktop or program group may be different from this sample.

Starting from your desktop or program group,

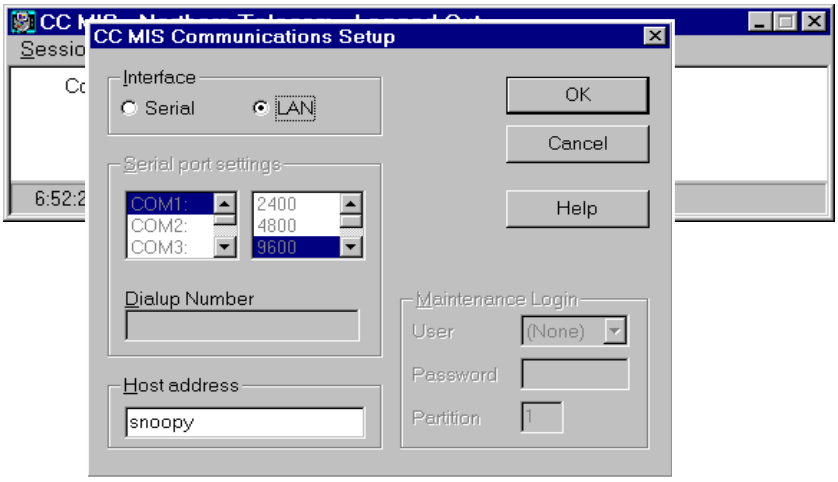
1. Double-click on the CC MIS icon.
2. Then, from the CC MIS Main window, click on **Session** and select **Login.**
3. The Login window appears.
4. Enter your supervisor ID *[and password if required].*
5. Identify your preferences, then click on the OK button.

The steps are explained in detail in the paragraphs that follow.

Double-click on the CC MIS icon

After MS Windows is running on your PC, a window containing the CC MIS icon should be on your display. The first step to logging in is to double-click MB1 on the CC MIS icon. The CC MIS Main window is displayed along with the Communications Setup window. If all settings are correct, click OK. The Communications Setup window disappears and the CC MIS Main window is displayed.

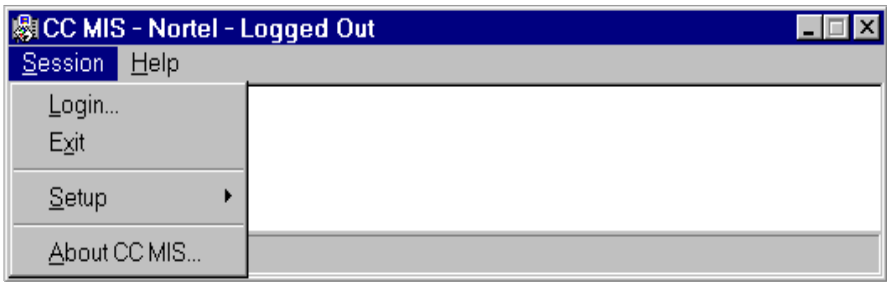
CC MIS Main window



Click on Session and select Login option

After the CC MIS Main window appears, click on the Session menu button and select the Login option. The Session pulldown menu is shown below.

Selecting the Login option from Session pulldown

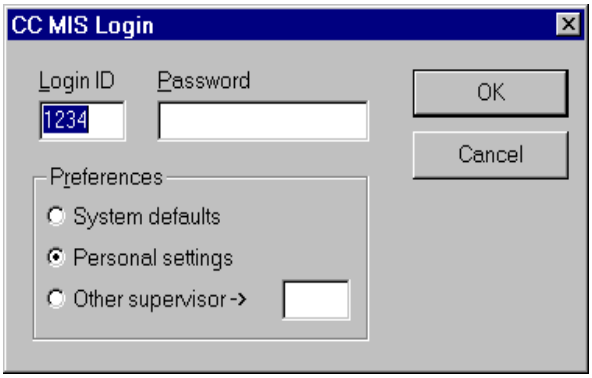


Enter supervisor ID and password *(as required)*

The CC MIS Login screen is displayed. Enter the supervisor ID (and password if required). Click on the OK button.

Note: The last supervisor ID entered is kept after logging out of CC MIS. Therefore, if you are logging back into a terminal you had logged into previously (and you do not have a password) you can press the Return key. If a password is required, press the Tab key to tab to the Password field.

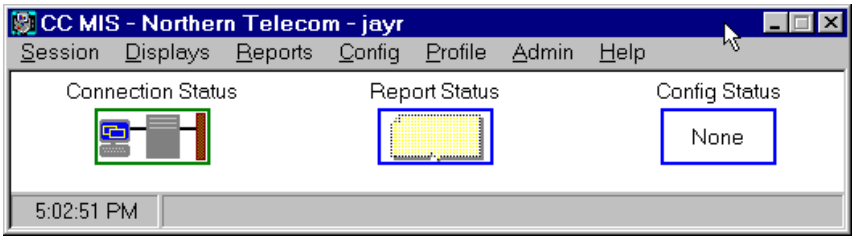
CC MIS login screen



CC MIS Main window is displayed

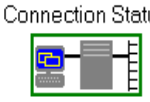
The CC MIS Main window is displayed after successful login.

CC MIS Main window

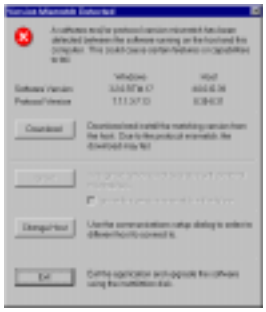


Note: The connection icon on the CC MIS Main menu has a slightly different appearance when the Networking feature is enabled and you log into a Network Access Partition (NAP).

Connection Status icon - NAP



Download New version



The Download dialog is displayed to provide an automatic upgrade process for your PC. This dialog is displayed when the CC MIS system has been upgraded on the Host and the version your running doesn't match the Host version. Click on the Download button to start the upgrade process then reply to the prompts.

If desired, you can select another Host to which you are authorized connect or Exit without performing the upgrade.

Logging out

To logout from your session, use the steps listed below.

steps

Logging out of CC MIS

1. Return to the main window.
2. Select Session / Logout.
3. The CC MIS session is ended.

When the system goes down

If CC MIS goes down, your session terminates. In this instance, the Connection Status icon border goes from green (operational) to red (non-operational), and the message, Host Process Terminated, displays.

When the system comes back up, the Connection Status icon goes from red to green. However, the message, Host Process Terminated, continues to display. The message explains the need to log in to supervisors who may have been away from their terminal when the system went down.

Exiting CC MIS

To exit CC MIS, use the steps listed below.

steps

Exiting CC MIS

From the CC MIS Main window.

1. Select **Session / Exit**.
2. The CC MIS window disappears.

Defining communications (Terminal Setup screen)

The communication parameters are defined at installation. If you need to re-define these parameters you can do so by accessing the Terminal Setup screen. You access the Terminal Setup screen using the steps below to access the terminal setup screen.

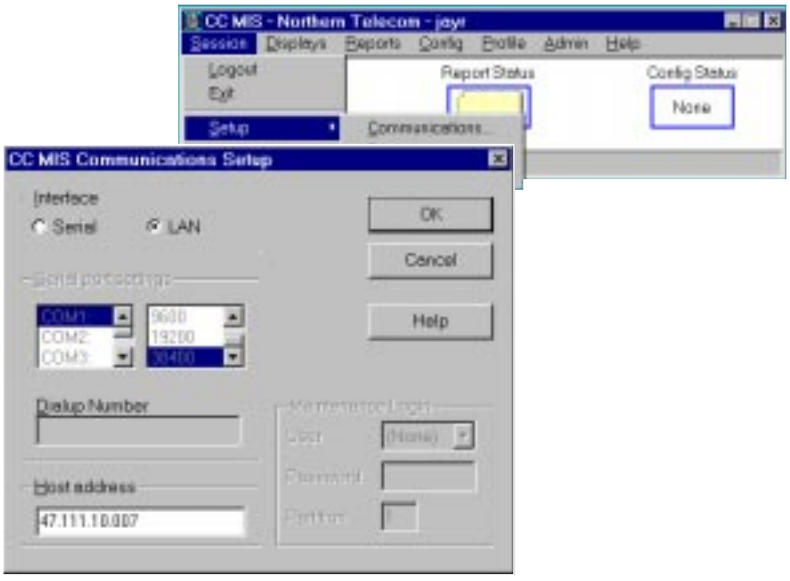
steps

Accessing communication parameters

1. Return to the CC MIS Main window.

2. Click on **Session** and select **Setup/ Communications**

3. The Communications Parameters window appears.



Refer to the CC MIS Online Help for communication field descriptions.

4. Enter changes.

5. Click on the OK button.

Defining a PC-attached wallboard

Use the steps below to attach a wallboard to a supervisor PC.

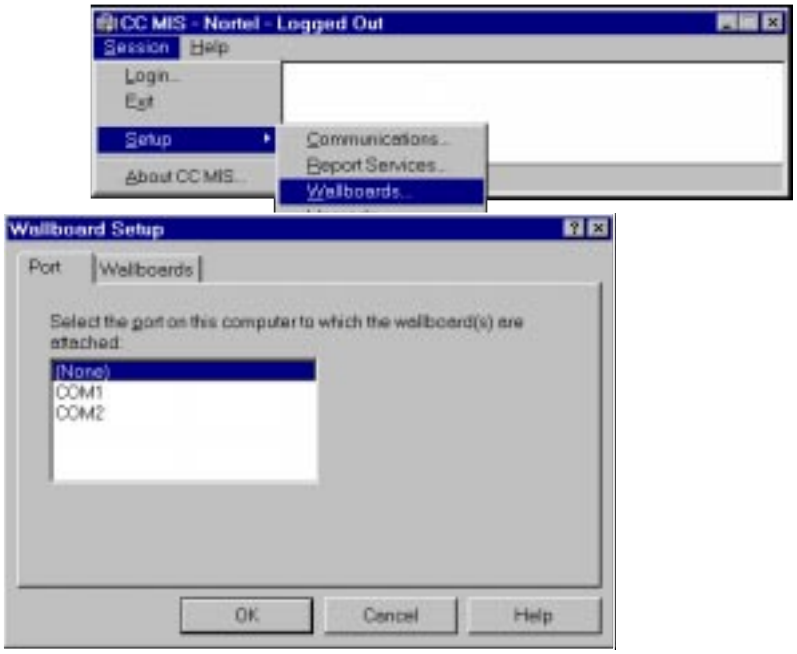
steps

Accessing wallboard configuration

1. Return to the CC MIS Main window.

2. Click on **Session** and select **Setup/ Wallboards**

3. The Wallboard Configuration window appears.



4. Enter configuration information in the Port tab. Click on the OK button after port selection is made.

5. Click on the Wallboards tab to Add, Delete, or Rename a PC-attached wallboard. Click Ok to apply new configuraiton or Cancel to exit without saving the selection.

Report Services (Printer, Fax and Filing Setup)

Printers, faxes, and filing destinations can be defined using the Report Services Setup screen. You access the Printer Setup screen using the steps below. Depending on your Windows configuration, the setup screen can be comprised of up to six tabs.

steps Accessing report services setup

1. Return to the CC MIS Main window.

2. Click on **Session** and select **Setup/Report Services.**

3. The Setup window appears.

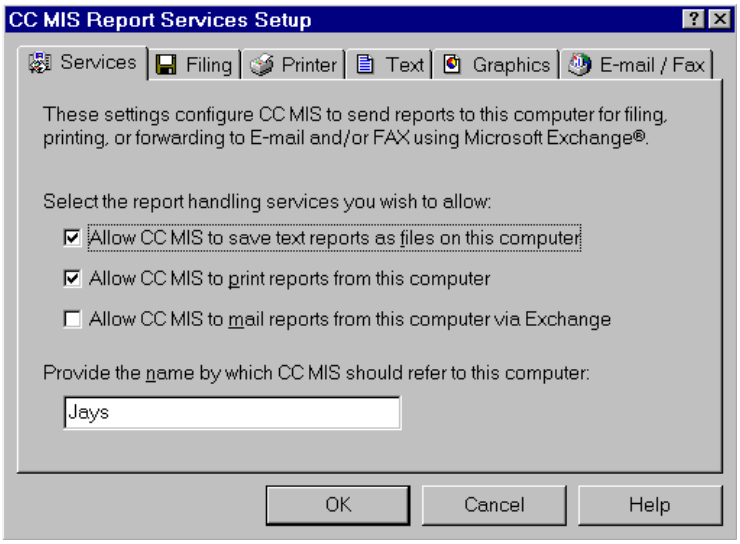
Refer to the CC MIS Online Help for tab field descriptions.

4. Select tab and enter desired settings.

5. Click on the OK button.

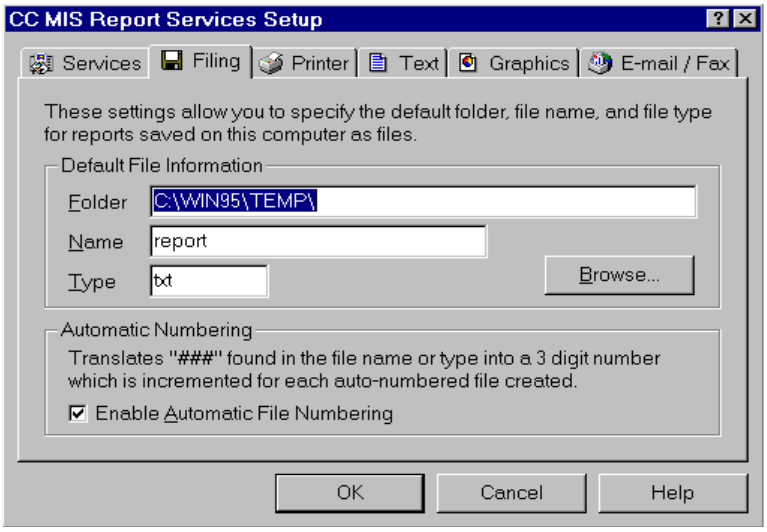
Services Tab

The services tab allows you to specify the services that will be allowed for the PC.



Filing Tab

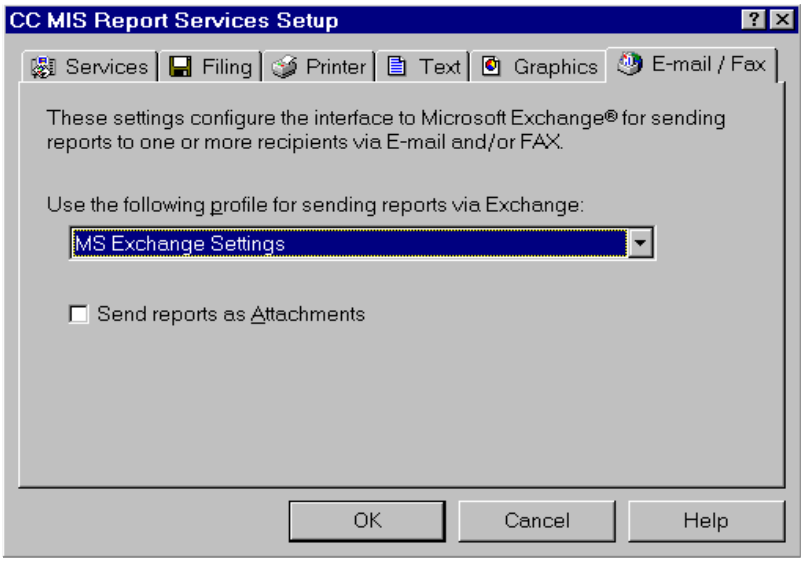
The Filing tab allows you to specify the default folder, file name, and and the file type for the reports that are to be saved as files on the PC.



E-Mail/Fax Tab

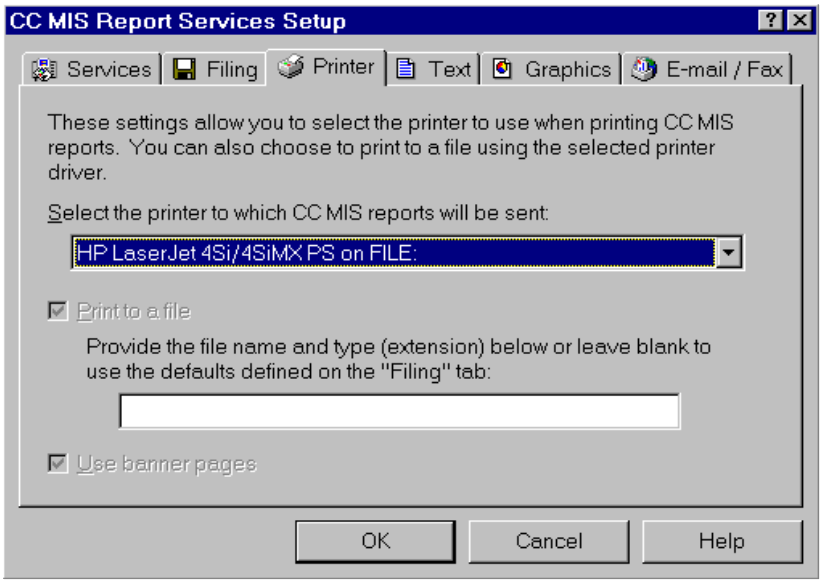
If Microsoft Exchange™ is available on your PC, You can use the E-Mail/ Fax tab to send reports using e-mail or fax to one or more recipients.

Note: You cannot e-mail or fax graphical reports.



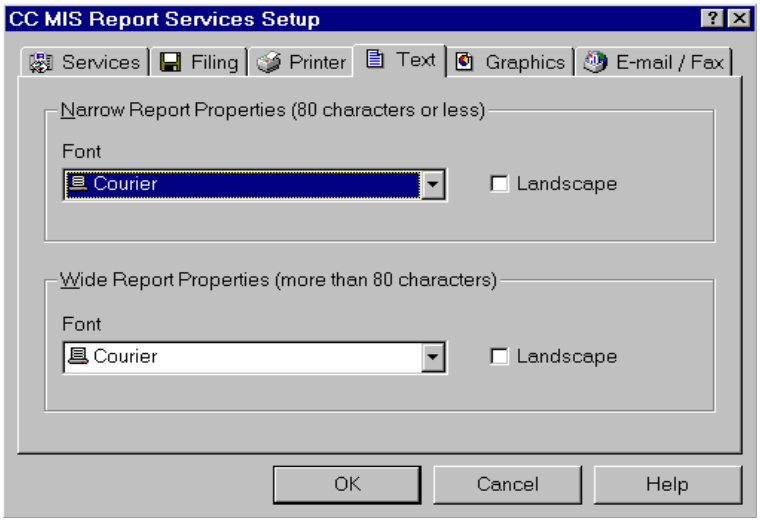
Printer Tab

The Printer tab allows you to select the printers that are used to print reports. You can also specify the "Print to File" option to create a printer file. For example, if you are using a postscript printer, this option will create a post-script file.)



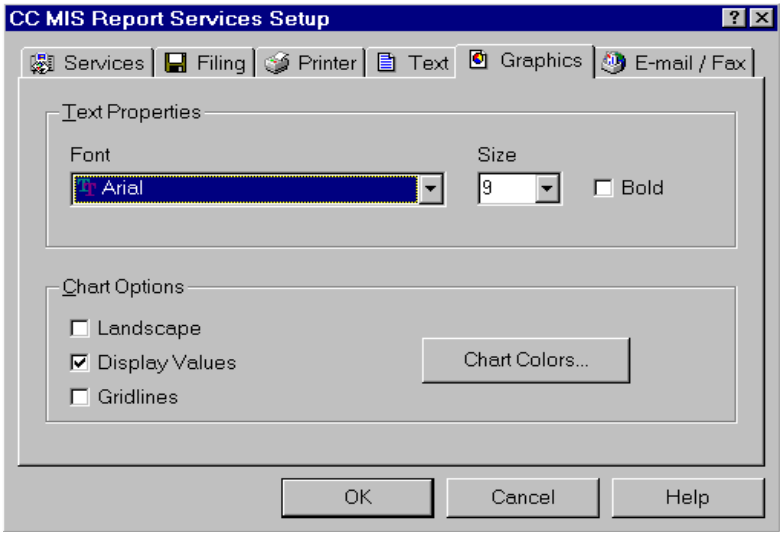
Text Tab

The Text tab allows you to specify the format setting for tabular reports.



Graphics Tab

The Graphics tab allows you to specify the format setting for graphical reports. (In Release 4, graphical reports must be printed to PC-attached printers.)

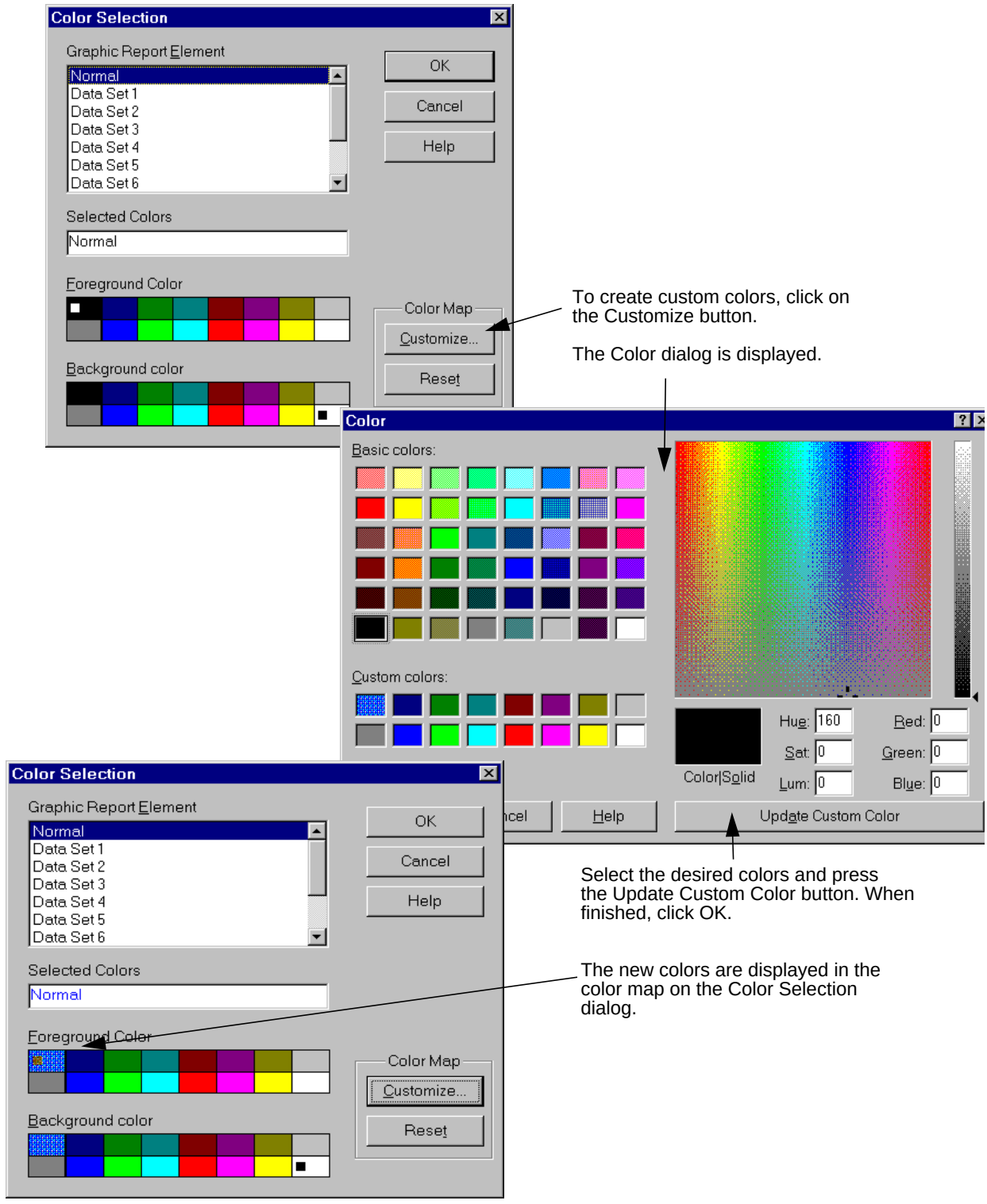


Customizing Colors

If your PC supports more than 256 colors, you can customize the colors that are used in graphical reports. Click on the Chart Colors button and the Color Selection dialog is displayed. Click on the Customize button in the Color Map area. A Color dalog is displayed. Select the desired colors and click on the Update Custom Color button to update the palette in the Color Selection dialog.

Color Customization

The color maps in the Color Selection dialogs for printers and displays can be customized. This option is available if your system is capable of supporting more than 256 colors.



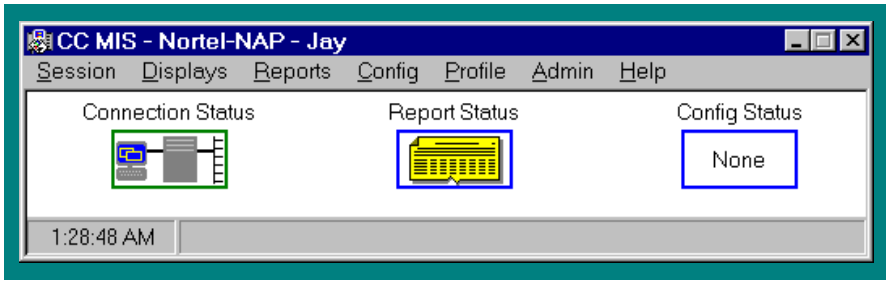
CC MIS Main Functions

Introduction

This chapter introduces you to the functions that are accessed from the from the CC MIS Main window.

The CC MIS Main window is shown in the figure below.

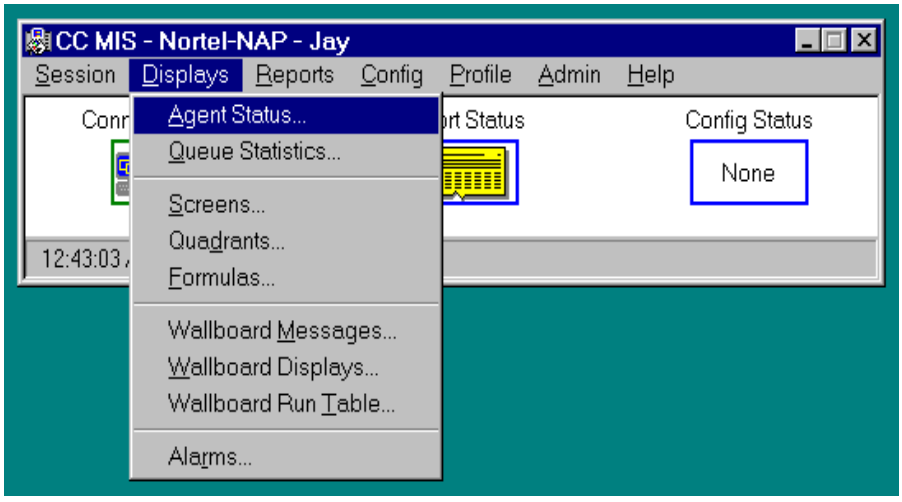
CC MIS Main window



Displays menu

The Display menu contains commands to enter into Agent Status and Queue Statistics displays. Click on the Displays menu button to display the Displays menu.

Displays menu

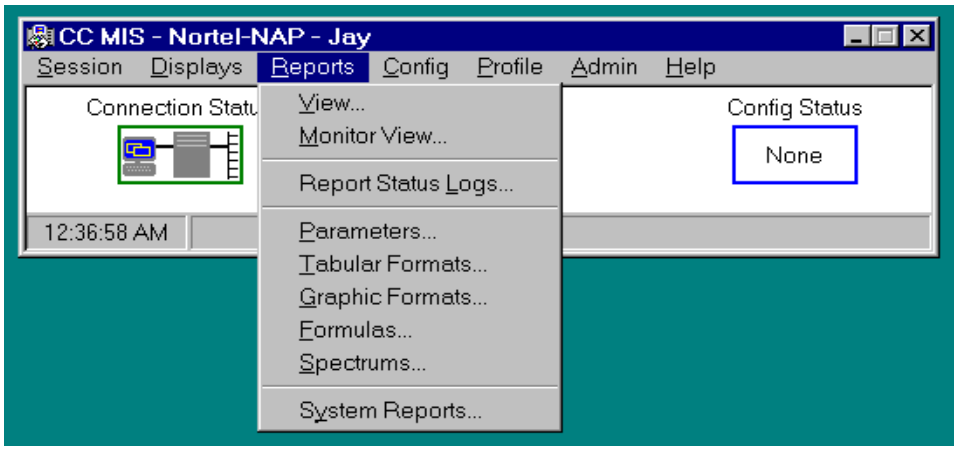


Note: The Alarms option is displayed only when the SNMP feature is enabled.

Reports menu

The Reports menu contains commands for the CC MIS Reporting function.

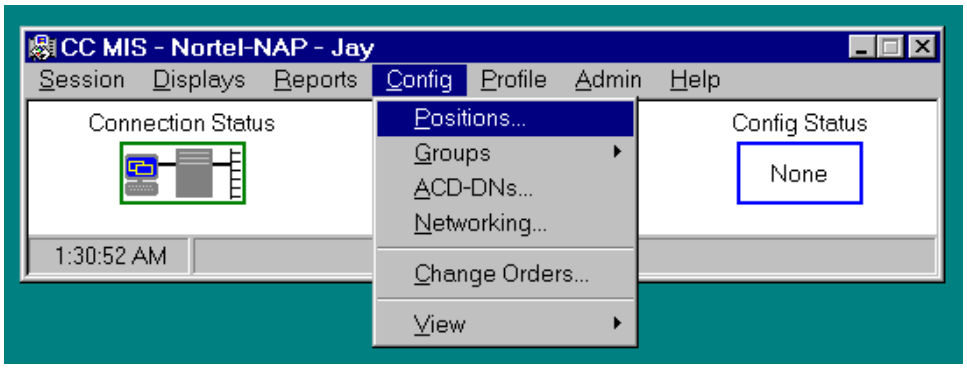
Reports menu



Config menu

The Config menu contains commands for the Configuration Control function.

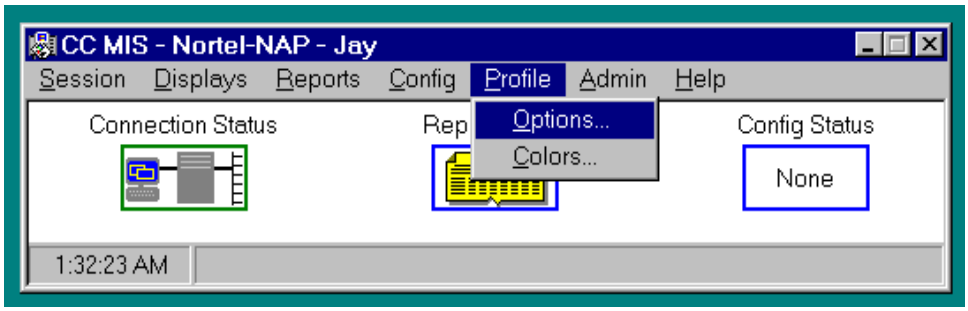
Config menu



Profile menu

The Profile menu contains commands for setting a supervisor's profile.

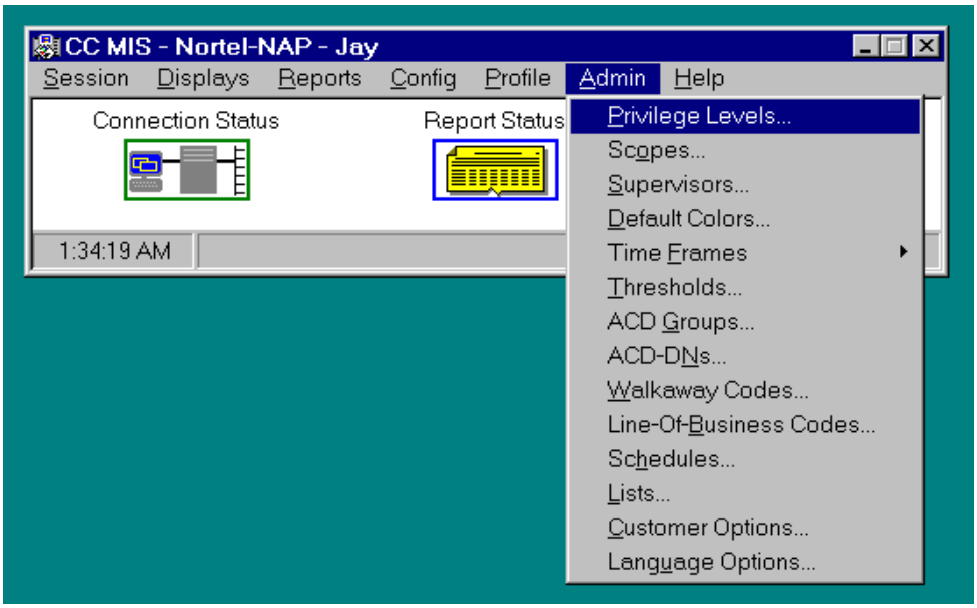
Profile menu



Admin menu

The Admin menu contains commands used by the system administrator to administer control over the CC MIS environment. Admin options are not covered in this guide.

Admin menu



Networked CC MIS

Supervisors on CC MIS systems running with the Networking feature enabled on a Network Access Partition (NAP) have access to view information for supervisors running on a different CC MIS system, and to network-wide information for partitions defined as virtual nodes for the NAP..

Networking enables the following:

- Node field in all of the Configuration Control screens.

- Ability to insert groups into Configuration Control screens based on node selection.

- Partition code suffix on ACD Group names in real-time displays.

- Ability to view information based on a selected node in the view windows for the Audio, OFRT, and IBNRTE Tables.

- The Connection Status icon appears different on a NAP. The border on a NAP connection icon indicates the status of the virtual nodes associated with the NAP. If the border is red, it indicates that one or more virtual nodes are down.

Agent Status Display

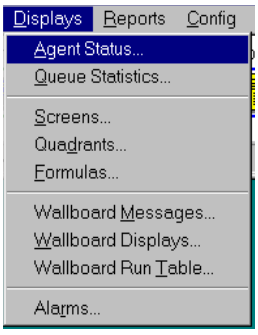
Introduction

The Agent Status display provides information concerning the status of each position in an ACD group. This display allows the supervisor to see the type of call the agent is currently handling, the agents that are logged in, agents on walkaway, and other related information.

Accessing the Agent Status display

Perform the following steps to access the Agent Status display.

steps **Accessing the Agent Status display**



1. From the CC MIS Main window, select **Displays** / **Agent Status**.
2. From the Agent Status Display menu, select one of the views from the View pulldown menu.
3. The Agent Status screen is displayed.

Agent Status display

The Agent Status display allows you to control the view of the positions for which agent status is displayed, the information presented for each position, and layout of the display. The Agent Status display is shown below.

Agent Status display

Agent Status display field descriptions

The following defines the fields that can appear on the Agent Status display.

Field	Description
ACD GROUP	The ACD group that is being viewed.
POSN	The position ID of the physical phone set. *Note: Clicking on an agent position ID results in a temporary agent detail window being displayed.*
STATUS	The state of the position. ***Note:*** This field is highlighted if it exceeds the threshold.
DURATIONS	Real-time timer that indicates the time period (in minutes and seconds) that the agent has been in the current state.
AGENT NAME	The name of the agent logged into the position.
LOGIN	Displayed when the login option is selected from the Preferences menu. This field displays the time of day the agent logged in. This field is always displayed in the right most column.
DUAL DN STATUS	Displayed when selected from the Preferences menu to show the information for a second DN (see position 1179 in the figure above).

Setting the view and display

You can select one of three possible views through the Agent Status View menu: Subgroup, Scope, and Global. Views available to supervisors are determined by the access provided by the system administrator when creating your profile.

Your default view

You set the default view in your profile. CC MIS uses this view when you first login and access your Agent Status display. The default can be either subgroup/group, scope, or global. During a session, you can change this default to another view. You will see the change by logging out of the current session and logging back into CC MIS.

Selecting fonts for the displays

You can select the fonts for the displays. You identify the font used in the display through the Preferences menu. You identify the font, font style, and size.

Controlling the information presented in the display

You identify the information to appear for each position in the group through the Preferences menu. You can select States, Names, Hold Time, Durations, or Login Times, or desired combinations of these selections. If you do not select States, the color in which the position number appears indicates the state of the position. You define the colors for each state through the Preferences / Color menu item.

Note: If your system supports more than 256 colors, the Color Selection dialog will display a Customize button. Click on this button to display a Color dialog. The colors you in this dialog will be placed in the color map for use in displays.

Showing elapsed time for agent positions

The CC MIS system tracks the length of time an agent position spends in each state. To view this information in the Agent Status display, select the Duration option from the Preferences menu. This field is always displayed in the Agent Detail window (accessed by clicking on the agent position) and on Agent Status display printouts.

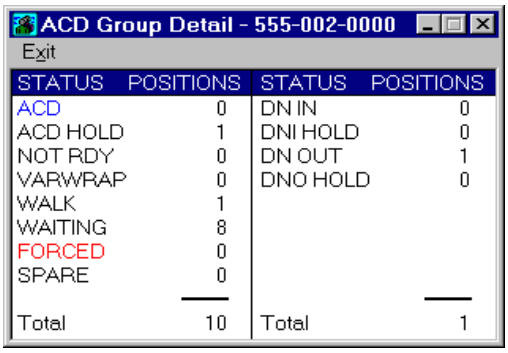
Hold Time

The Hold Time option is selected from the Preferences menu. The Hold Time option affects the way the time is displayed in the Duration field. When enabled, each time the ACD or DN call is placed on hold, the timer resets and begins counting. An underline (_) is used to differentiate hold time from total ACD or DN call time. After the hold state is terminated, the timer reverts to displaying the total call duration.

ACD Group detail window

You can display a permanent ACD Group Detail window by positioning the cursor on an ACD Group ID in the Agent Status window and clicking the right mouse button.

ACD Group display



Miscellaneous display functions

Printing the displays

While in a display, perform the following steps to print the display. The display prints on the default printer.

Selecting colors and fonts for displays

You can set the colors and fonts for the elements of a display.

Note: If your system supports more than 256 colors, the Color Selection dialog will display a Customize button. Click on this button to display a Color dialog. The colors you in this dialog will be placed in the color map for use in displays.

Saving Preferences

You can set preferences for fonts and colors, then save the settings for the display.

Monitoring another supervisor

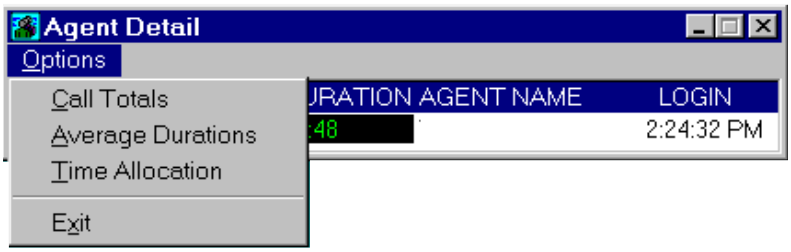
You can observe the displays of another supervisor if you have the Display option Monitor selected in your Privilege Level definition. This feature is useful to supervisors when a peer is absent from their workstation and someone else must monitor the activity of the agents and queue for which the supervisor is responsible.

Note: When monitoring another supervisor's display in scope view, the display will be limited to the scope restrictions of the supervisor ID you are monitoring. (This is transparent if both you and the supervisor you are monitoring have a global scope restriction.)

Agent Detail window

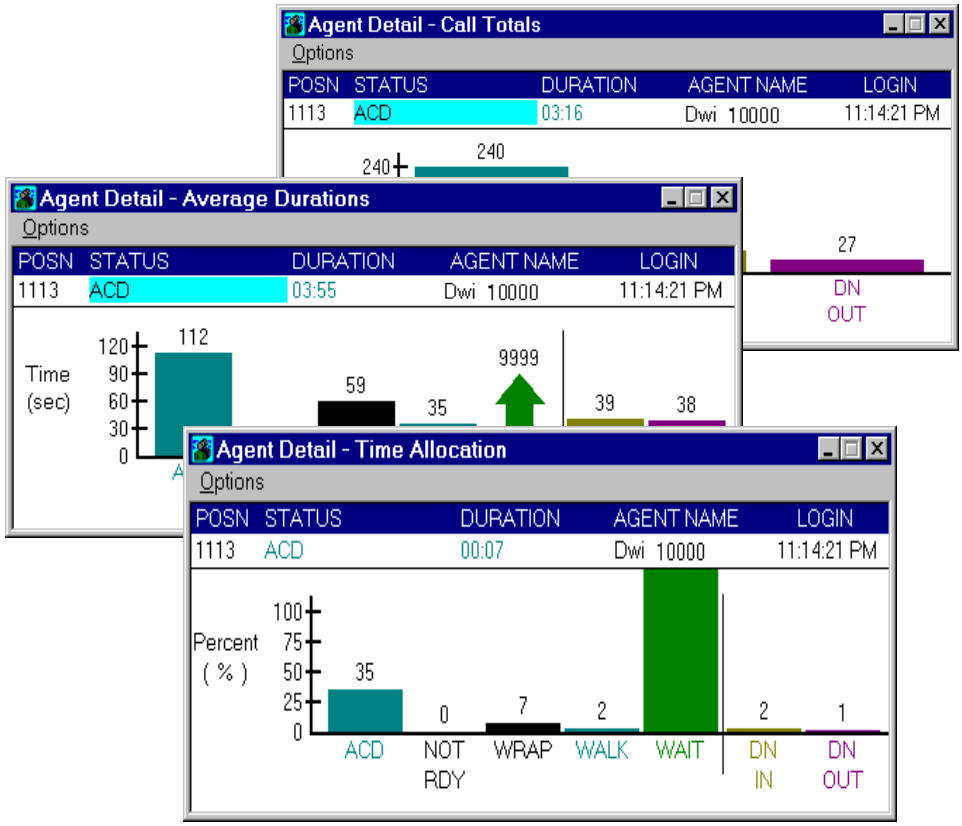
The Windows interface allows you to display a permanent Agent Detail window by positioning the cursor on an agent position ID in the Agent Status window and single-clicking the right mouse button. The figure below shows an example of the Agent Detail window with the Options menu displayed. The selection of one of these options changes the content and layout of the detail screen.

Agent Detail options menu



Note: The Agent Status window can be temporarily displayed by pressing and holding the left mouse button.

Options menu selections



6 Queue Statistics Display

Introduction

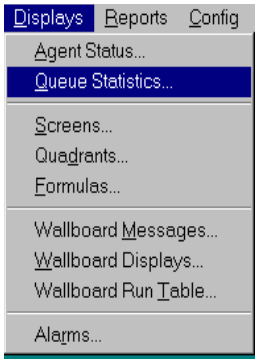
The Queue Statistics display provides information about the efficiency with which an ACD group is handling calls.

Accessing the Queue Statistics display

Perform the steps to access the default Queue Statistics display. The Default Display field of your profile determines the format of the Queue Statistics display.

The System Administrator determines the default when creating your profile. If you have access to your profile, you can change the default.

steps Accessing the Queue Statistics display

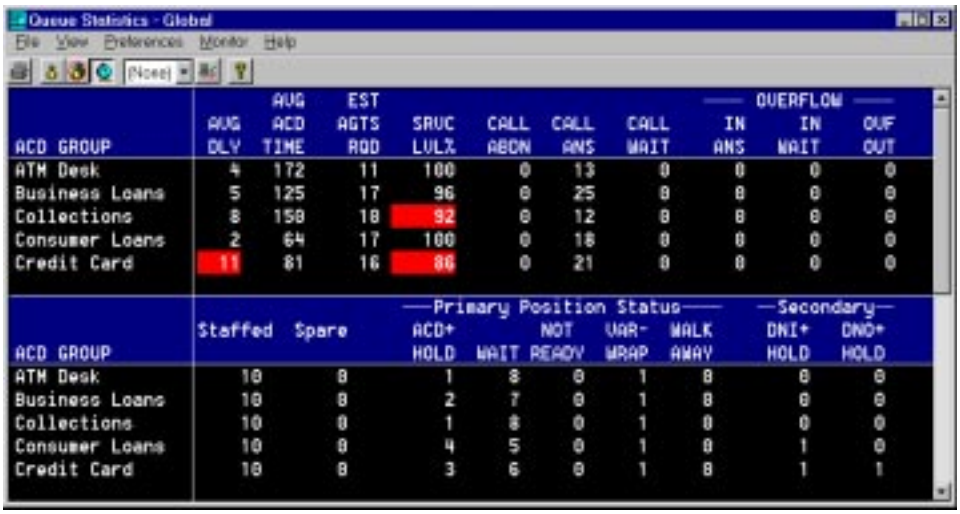


1. From the CC MIS Main window, select **Displays** / **Queue Statistics**.

2. The default Queue Statistics screen is displayed.

The Queue Statistics display (with one of many views) is shown in the figure below.

Queue Statistics display



Changing or controlling the Queue Statistics display

There are three things you can change or control when using the Queue Statistics display:

- the groups on which statistics are displayed
- the format in which statistics are displayed

When using the Queue Statistics display, you can control

- groups by setting the view to Single Group, Scope, Global, or New ACD Group; or if enabled in your privilege level definition, monitoring another supervisor
- format by setting it to one of the four standard formats, a personal format or a public format

Setting the view

You can select a view from the View menu. Depending upon your scope settings, the following views may be available:

- Single Group
- Scope
- Global

Additional views (such as New Subgroup) may also be available depending on you access privileges. Access privileges are provided by the System Administrator.

Your default view

You set the default view in your profile. CC MIS uses this view when you first login and access your Queue Statistics display. The default is selected from the menu list. During a session, you can change this default to another view. You will see the change by logging out of your current session and logging back in.

Note: In order to access a group view, you must have a group member list defined in your profile. To access global view it must be enabled in your profile.

Controlling the format

The format of the display refers to the manner in which the statistics are presented, tabular or graphic. Unlike the Agent Status display, the Queue Statistics display can be customized. Therefore, you can create formats in addition to the standard formats provided with the system. By customizing the display, you select the statistics presented in the display, add meaningful names to the statistics, and choose whether to display the information in tabular or graphic format.

Changing the display format without changing the default

While you are in a session, you can change the format temporarily; that is, changing the format until you logout, or change the format again. You change the format through the View / New Display Format command. If you change the display format without changing the default, and you logout, CC MIS reverts to your default Queue Statistics display when you establish another session.

Accessing Configuration Control

To access Configuration Control while you are in the Queue Statistics display, you must have one or more of the Configuration Control options that pertain to ACD groups enabled in your privilege level definition. This feature allows you to change ACD group parameters using multiple windows on your screen. You access the Queue Statistics display in one window, and access the Configuration Control functions in another window.

Creating your own Queue Statistics display

You can create your own Queue Statistics display to identify the information presented in the display and its location on the screen. In order to create your own personal Queue Statistics display, you must have the Display option Personal formats selected in your privilege level. This option allows you to create, modify, and delete personal display formats using the Quadrant Definition and Screen Definition modes.

Note: Your supervisor privilege level must be set to allow you to define formulas, modify public quadrants, and define public screens. The Display option Formulas selected in your privilege level. If a system admin password is defined, you must enter the password to access admin functions.

Overview of the process

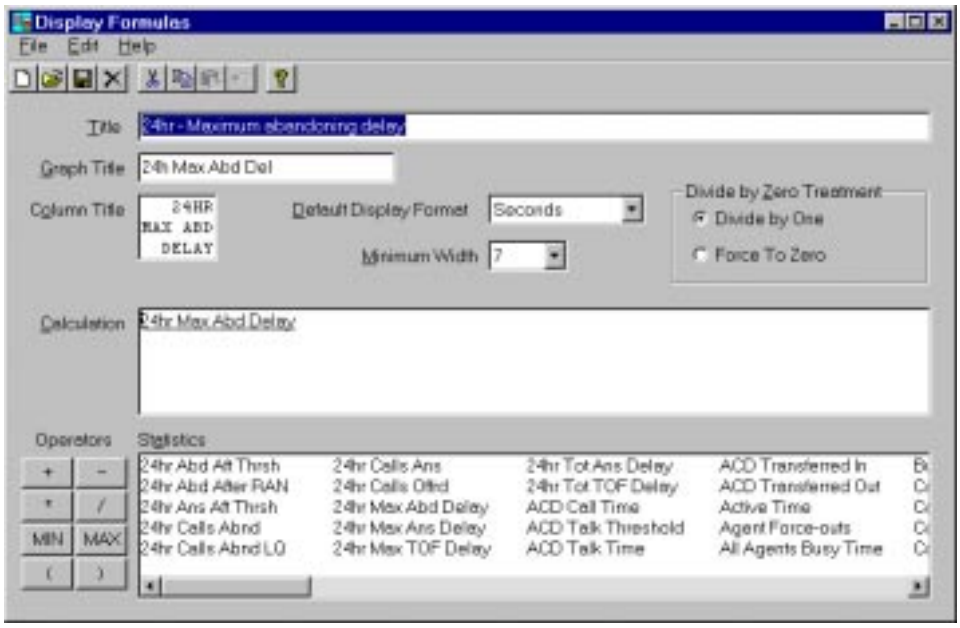
There are three basic steps to creating your own Queue Statistics display; defining formulas, defining quadrants, and defining screens. The following paragraphs describe the basic process of creating your own Queue Statistics display.

Step 1: Defining formulas

First you define any formulas you need to collect the data you want in your display. However, you do not need to create custom formulas; you can use any of the existing statistics collected by CC MIS. The Display Formulas window is accessed by selecting the Displays / Formulas option from the CC MIS Main window.

The Display Formulas screen is shown in the figure below.

Display Formulas window



Step 2: Defining quadrants

In this step, you define the way the information will be presented in a quadrant. There are two quadrant sizes: full and half screen. There are two types of layout: tabular and graphic.

You have the option of using public quadrants, defined by system administrators, or using your own quadrants. When you create your own quadrant, it can be saved as personal or public.

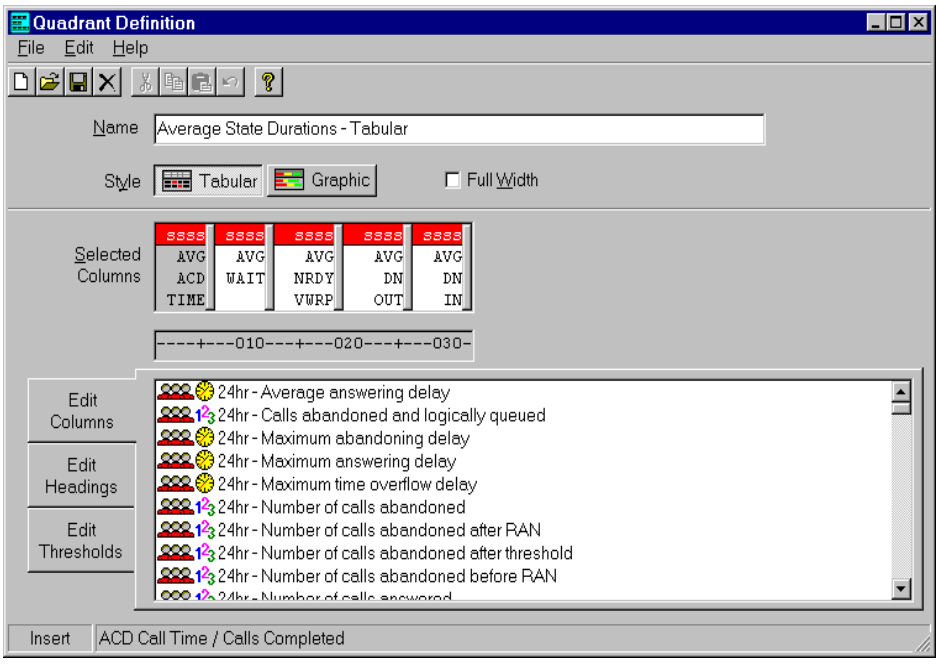
You can define a total of five personal quadrants.

Defining tabular quadrants

Tabular quadrants are defined using the Quadrant Definition window. The window is displayed by select the Displays / Quadrants option from the CC MIS Main window.

The Quadrant Definition window is shown in the figure below.

Quadrant Defintion display (Tabular)



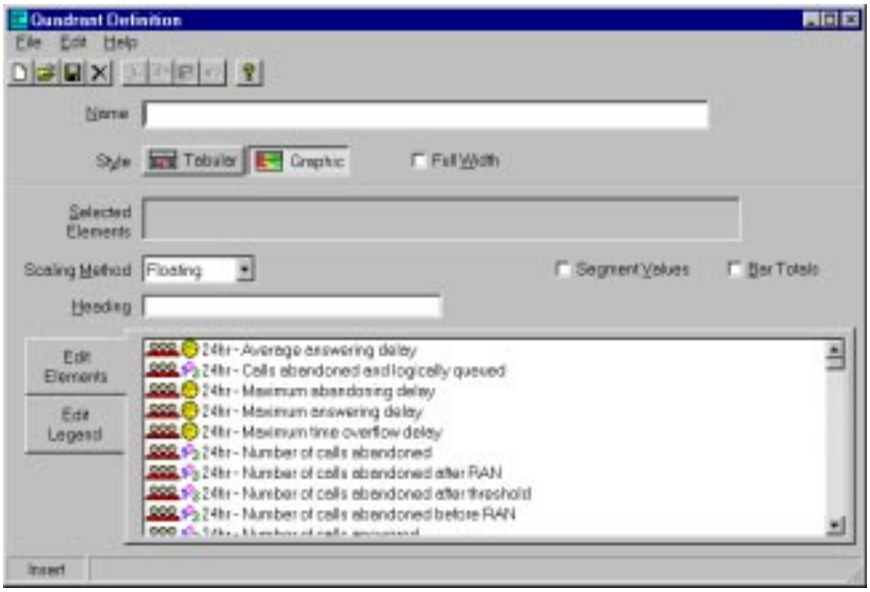
The lower portion of the screen contains standard quadrants. It is recommended that you select a standard quadrant then modify its values and titles as desired. To edit, click on the Edit Heading and Edit Threshold buttons to the left of the list.

Refer to the CC MIS Online Help for descriptions of the fields on the Quadrant Definition window.

Defining graphic quadrants

Graphic quadrants are defined using the same window as the tabular quadrant. When the Graphic button is selected in the style field, the window is redrawn with the fields shown in the figure below.

Quadrant Defintion display (Graphic)



The lower portion of the screen contains standard quadrants. It is recommended that you select a standard quadrant then modify its values and titles as desired. To edit, click on the Edit Legend button to the left of the list.

Refer to the CC MIS Online Help for descriptions of the fields on the Quadrant Definition window.

When finished defining the quadrant, save the screen by selecting the Save option from the File menu.

Saving your quadrant as a public or personal quadrant

Public quadrants are available to all supervisors, while personal quadrants are available only to you. Only System Administrators can assign the supervisor the privilege level needed to create public quadrants. To create a personal quadrant, save your definition as a personal quadrant using the File / Save command, then selecting Personal in the popup dialog.

When defining a quadrant, the File and Edit menus provides the following functions as shortcuts:

- reading an existing quadrant
- undoing changes to quadrant
- overwrite an existing quadrant
- delete an existing quadrant

Step 3: Defining screens

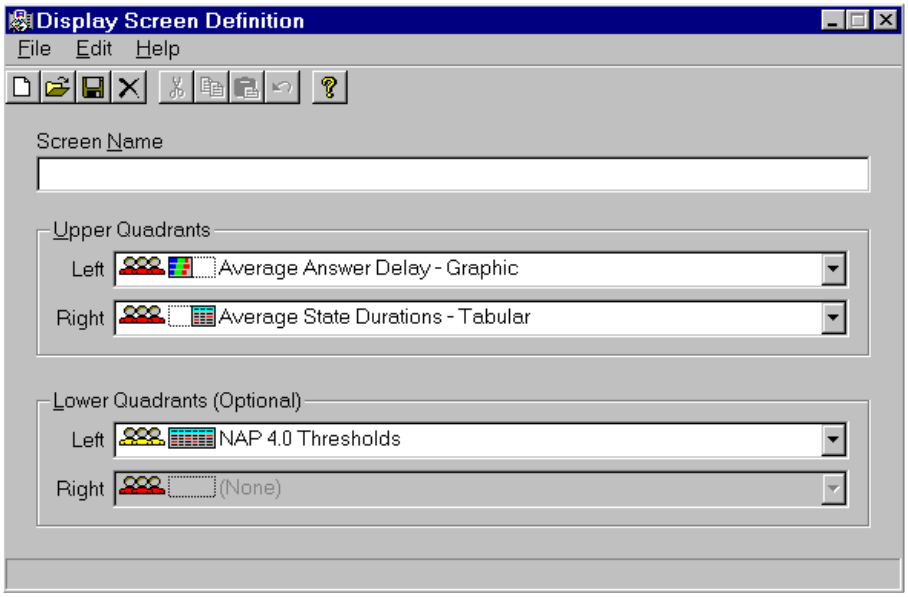
In this step, you name your display, and position the quadrants in the display. You have the option of using public screen definitions or using your own. When you create your own screen definition, it can be saved as personal or public. You can define up to five personal screens.

After defining your quadrant, you position the quadrants on a screen. The size of a quadrant must be considered when placing the quadrant on the screen.

Full screen quadrants can be placed only in either the upper or lower left areas of the screen. Lower screen quadrants can be defined only if a quadrant is placed above it. In addition, the lower screen quadrants are optional. If there is only an upper quadrant, the system automatically extends the display to the bottom of the screen.

Select the Displays / Screens command on the CC MIS Main window.

Display Screen Definition window



Refer to the CC MIS Online Help for descriptions of the fields on the Display Screen Definition window.

When you are defining a screen, you can use any standard quadrant, public quadrant, or a personal quadrant (defined by you). There are predefined standard quadrants available from the drop down menu in the Screen Definition window.

You can read an existing screen definition and modify it to meet your needs by selecting the File / Open command, then selecting the definition from the list. You can also overwrite an existing definition.

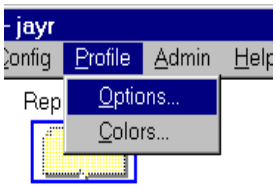
After the screen is defined, you can view the screen using the steps below.

steps Viewing a custom display

1. From the Queue Statistics Display, select **View / New Display format**.
2. At the New Display Format? box, select the screen.
3. Click on ok.

Use the steps below to set your default to display a custom screen.

steps Setting your default to a custom display



1. From the main window, select **Profile / Options**. The system displays the Profile Maintenance screen.
2. Select the default display (in the real-time display options area). At the Default Display screen, click on the down arrow to highlight your format.
3. Save the default settings.
   a. From the Profile Maintenance menu, select File / Validate to verify entries are valid.
   b. Select File / Save to save settings
4. Exit and implement changes immediately.
   a. From the Profile Maintenance menu, select File / Exit. A dialog box appears.
   b. Read the information box, and click Yes if you want the changes to be applied immediately. You will be logged off of CC MIS. Note: If you do not want to be logged out, click No.

Wallboard Messages

Introduction

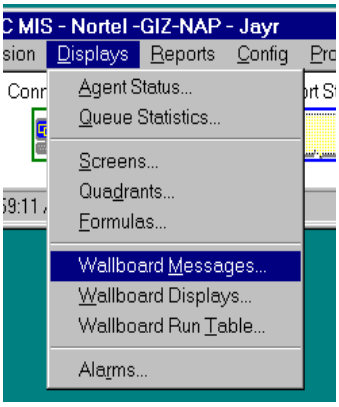
Wallboards are LED message boards that are mounted on the walls of an ACD group office. Supervisors use wallboards to notify agents of ACD statistical information and administrative information. Supervisors construct messages to suit their needs, define what messages are to be displayed, and define time frames for displaying messages. Messages consist of text and variable information such as Queue Statistics display formula results.

Users with Spectrum wallboards can send multi-color messages and multiple line text format (depending on model of wallboard).

Accessing the message screen

The Wallboard Message Definition screen allows supervisors to define the actual messages that are displayed on the wallboard.

steps Access Wallboard Message Definition



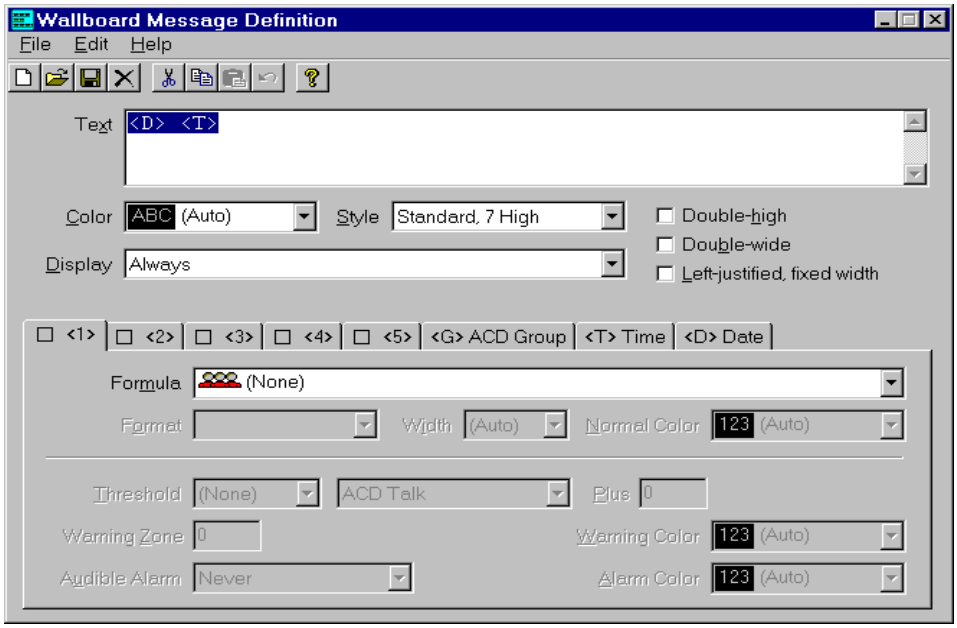
1. From the CC MIS Main window, select **Displays** / **Messages**.
2. The Wallboard Message Definition screen is displayed.

Basic steps for defining and displaying messages on the wallboard are:

1. Define the message(s) using Wallboard Message Definition screen.
2. Define the display(s) using Wallboard Display Definition screen.
3. Send messages to wallboard using Wallboard Run Table screen.

The Walboard Message Definition display is shown in the figure below.

Wallboard message definition screen



Wallboard Message Definition screen fields

Text field - Messages must not exceed 100 characters (this includes five parameters that represent values from formulas). The character sequence <1>, <2>, ... <5>, <G>, <T>, <D> in the message text refers to the variables. Multiple lines can be defined for the message using line breaks "\n". A line break counts as two of the 100 characters allowed for the message.

Color, Style, Display fields - The display formats describes how the message is displayed on the wallboard. Click on the Down Arrow to select a format in each field.

Click next to desired optional settings such as Double-high or Double-wide options. (The display formats that you can use depend on the type of wallboard in use.)

Variable tabs - Contains a tab for each of the variables that cn be defined within a message. Variables represent formulas that are based on real-time statistical data collected by the system. Choose up to five formulas to display on the wallboard <1> thru <5>. The formulas available on the wallboard are the Queue Statistics display formulas, 10-min window, 24 hour, and Shift statistics. Click on the Down Arrow to view available options.

The ACD Group variable <G> displays the primary DN or defined name for the ACD group specified in the Wallboard Display Definition screen.

The Date <D> variable displays the date variable fields and the Time <T> variable displays the Time variable fields.

Defining a wallboard message

Use the following steps to define a wallboard message.

steps

Defining a wallboard message

1. Select **Displays/Wallboard Messages** from the CC MIS Main window. The Wallboard Message Definition screen is displayed.

2. Define the message:

a. At the Wallboard Message Definition window, access the Message Text box.

b. Enter the message to appear on the wallboard. Enter variables as a number between 1 and 5, surrounded by <>. (Example: Service Level <1>)

c. Specify the desired display format characteristics: color, style, and display format.

d. Click on the tab for variable choices (to define variables entered in message). Complete the variable information in the tab area.

e. For the variable, click on the down arrow in the Display Format box. Highlight your choice.

3. Save the definition:

a. At the Wallboard Message Definition window, select **File / Save**.

b. If the definition exists already, and you wish to update the definition, click OK on the information box.

Note: CC MIS allows you to save multiple wallboard messages with the same name. If you are modifying an existing wallboard message, save the modification by using the Save command to prevent the system from saving different wallboard message definitions with the same name.

4. Exit the screen by selecting **File / Exit**. The system returns to the main window.

Clearing a wallboard

Wallboards always display a message. Even when you power down the wallboard and power it back up, the wallboard displays the last message sent to it. You cannot send a blank message to a wallboard.

You may want to create a message that clears information from the display. For example, you may send an asterisk (*) or dashes (- - -) to the display to remove the previous message from the wallboard.

Wallboard Display Definitions

Wallboard Display Definitions allow the supervisor to select the message(s) to be displayed on the wallboard(s).

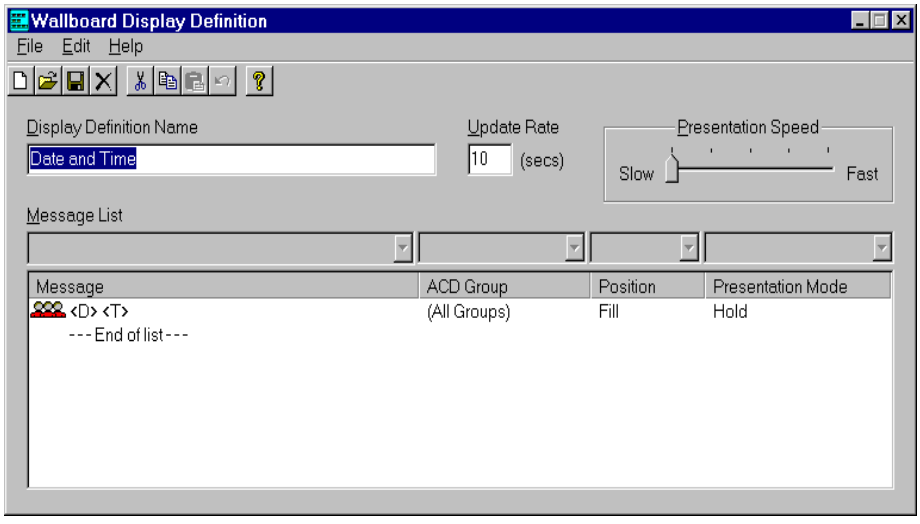
steps Accessing the Wallboard Display

1. From the CC MIS Main window, select **Displays** / **Wallboard Displays**.

2. The Wallboard Display Definition screen is displayed.

The Wallboard Display Definition screen is shown below.

Wallboard display definition screen



Wallboard Display Definition screen fields

Display Definition Name - Define a name that uniquely identifies the display definition. Use up to 40 characters in the name. CC MIS can save up to 250 display definitions.

Update Rate - Enter a value in seconds (range 2 - 999). This field determines the frequency that the wallboard display contents are updated. (On Spectrum boards, this is the rate at which variable information is updated. On Daktronics boards, this is the rate at which the messages are cycled on the wallboard.)

Message - Select up to five messages to be displayed on the wallboard. Click on the menu arrow to view a list of messages. (Window must be set to the insert mode by clicking on the End of List title in the Message area. Before a message can be selected, you must select Edit / Insert to create a place holder for the message to be added.)

Message List fields (Message, ACD Group, Position, and Presentation Mode) - If the corresponding message contains variables then identify the data source which corresponds to the message. If a selection is not made from the pop-up menu then nothing appears (all ACD groups will apply).

Note: In Profile Maintenance screen, if the ACD Group Names field is not enabled, then the Scope pop-up menu lists the groups by DN instead of by group names.

Presentation Mode - Specifies how the message is to be displayed on the wallboard.

Presentation Speed - Specifies how long (or quick) the message is to be displayed on the wallboard before it is rotated.

Defining a wallboard display

After the display and message definitions are complete, the wallboard display is defined using the steps below.

steps Defining a wallboard display

1. From the main window, select **Displays / Wallboard Displays**.

2. Enter information into the Wallboard Display Definition window:

Note: To set the window into the Insert mode to add messages, you must click on the End of List title in the message area.

a. Enter a name and select a presentation speed.

b. Select the messages to be displayed (1 - 5) by selecting **Edit / Insert** to create a message holder, then selecting the desired message from the Message List. Specify the ACD Group, Position, and Presentation Mode for the message. (Repeat for each message.)

c. Enter the desired update rate, in seconds.

3. Save the definition as follows:

a. At the Wallboard Message Definition window, select **File / Save**.

b. If the definition exists already, click OK on the information box.

If this is a new definition, click NEW at the Save Message Definition As box.

4. Return to the main window by selecting **File / Exit** from the Wallboard Display Definition window.

Sending a message to the wallboard

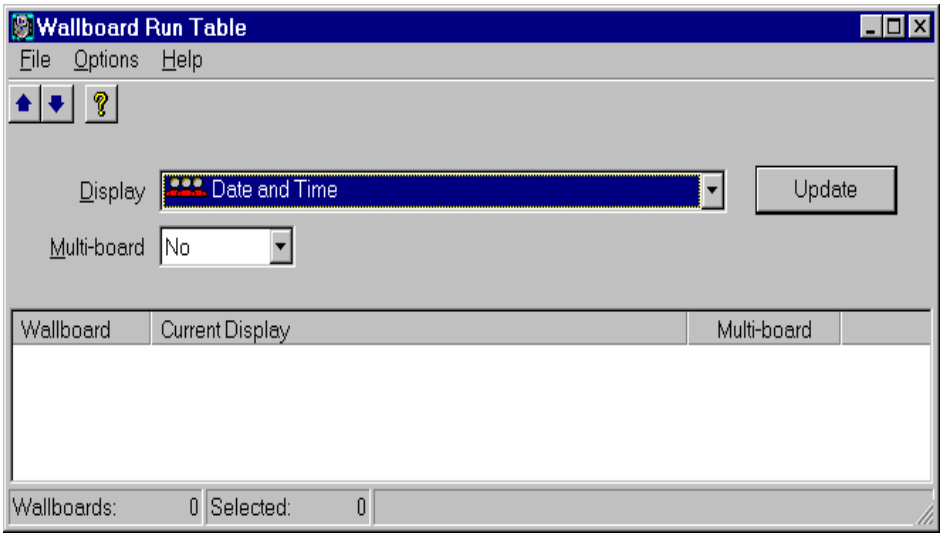
Follow the steps below to send a message to the wallboard display(s).

steps **Sending a message to the wallboard**

1. From the main window, select **Displays / Wallboard Run Table**.
2. Read the wallboard definition.
3. Send the message to the wallboard.
4. Select **File / Exit** to return to the main window.

The Wallboard Run Table window is shown in the figure below.

Wallboard Run Table screen



8 Alarms (SNMP)

Introduction

Note: The Alarms option is displayed only if the SNMP feature is enabled and you have supervisor access privileges to this feature. Due to the technical nature of the SNMP feature, a background in network management and the SNMP protocol is recommended for administrators and users of this feature. For additional information concerning this feature, refer to the CC MIS Online Help.

The Alarms Definition window is the starting point for all SNMP-related activities at the partition level, including:

- alarm definition and maintenance,
- SNMP community setup and maintenance, and
- SNMP MIB file transfer

From this window, you can setup up to 100 custom statistics to be monitored for each ACD group in the partition. The setup of each statistic includes threshold and alarm information. The information defined for each Alarm Definition is what is provided to a Network Management System (NMS) when it queries for the CC MIS Partition MIB entries.

Use the steps below to access the Alarm Definition window.

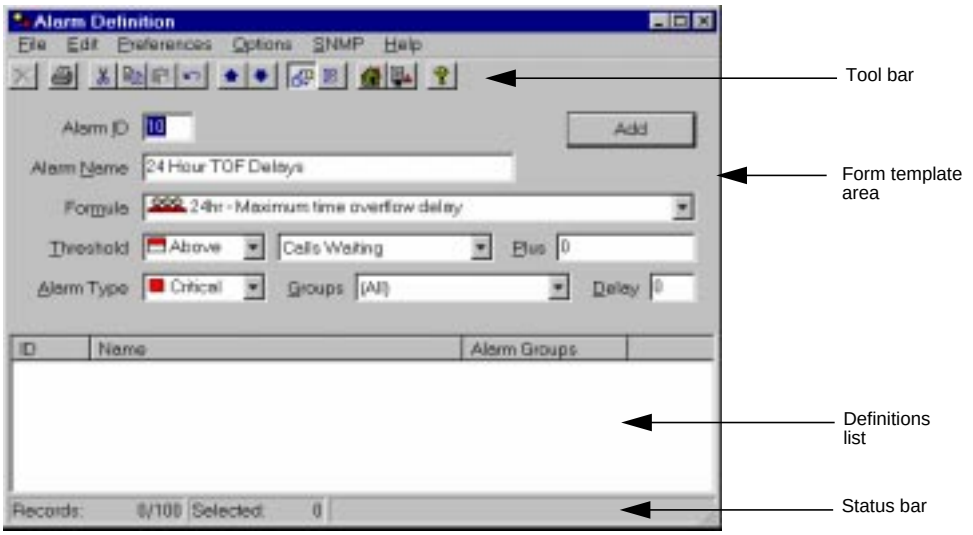
steps Accessing the Alarms definition screen

1. From the CC MIS Main window, select **Displays / Alarms** option.

2. The Alarms Definition window is displayed.

The Alarms Definition screen is shown in the figure below.

Alarm definition screen



Description

The Alarm Definition window consists of four major components; tool bar, status bar, form template and a definitions list.

Tool bar

The tool bar is the row of buttons across the top of the window which provides shortcuts to many of the commands available on the window's menu. A tool-tip window is displayed for a short time when the mouse cursor is positioned over one of the tool bar buttons. This window contains a brief description of the function performed by the particular button.

Status bar

The status bar appears at the bottom of the window and consists of three sections. The first section indicates the number of records defined and the maximum number allowed. The second section indicates the number of records currently selected in the definitions list. The third section is for displaying status and progress messages.

Form template

The form template consists of the fields in the top half of the screen which are used for entering and modifying the fields which make up an alarm definition. The definitions list in the bottom half of the screen displays a scrollable list of currently defined alarm definitions. Any or all of the fields in the definition may be displayed as a column in the definitions list. The only restriction is that the ID column must always appear in the first column. As columns are added or removed, the columns will automatically resize themselves to provide a best fit for the current width of the window.

The fields in this template are described below:

Alarm ID	A unique alarm ID number in the range 1 to 100.
Alarm Name	The name assigned to the alarm definition. This name can consist of from 1 to 30 characters excluding the vertical bar character (|).
Formula	The standard or custom formula used to compute the statistic value upon which the alarm condition is based.
Threshold Level	This field determines whether the computed value for the statistic should cause an alarm condition if its value rises above or falls below the threshold value defined for the alarm. The two possible values for this field are Above or Below.
Threshold Type	The type of threshold to apply to the statistic value. This can be any of the available ACD group thresholds (as defined via Threshold Definition) or the following special threshold type: (Zero) - The threshold value is defined solely by the constant value entered in the “Plus” field.
Plus	This field defines a numeric value to be added to the value of the ACD group threshold selected in the “Threshold Type” field to arrive at the threshold value used for determining when the statistic value indicates an alarm state. This constant component of the alarm threshold can be any signed 32-bit number (-2,147,483,647 through 2,147,483,647).
Alarm Type	This field determines the type of alarm (SNMP trap) to be generated by this alarm definition. The four possibilities are: Poll, Minor, Major, and Critical.
Alarm Delay	This field sets a delay period in seconds from the time that an alarm condition is first detected until the time that an SNMP trap is sent. If the alarm condition clears within this delay period, no trap will be sent. This delay value also applies to the clearing of an alarm condition. The maximum delay value is 999 seconds.
Alarm Groups	This field determines which ACD groups should cause traps to be generated. The field will contain the names of all currently defined ACD group lists (as defined in List Definition mode) and the special “(All)” selection. If a list is selected, only the groups in the specified list definition will cause traps to be generated. If “(All)” is selected, all ACD groups will cause traps to be generated.
Delay	This field allows you to enter a value to be used as the delay.

The operation of the Alarm Definition window depends on the current mode as indicated by the label on the button in the upper right corner of the window. The two modes of operation are modify and add. When the window is entered, the initial mode is set to the add (if there are no alarm definitions currently defined). Otherwise, it is set to the modify mode.

Use the steps below to add an alarm definition.

Note: For more information concerning adding or modifying an alarm definition, select the Help / Window option.

steps Creating an Alarm definition

1. From the alarm window, select **Options / Add** or click on the Add button.
2. Enter information into the Alarm Definition window.
3. Click on the Add button to send the definition to the database. The definition should now be listed in the list of alarm definitions.

Use the steps below to modify an existing alarm definition.

steps Modifying an Alarm definition

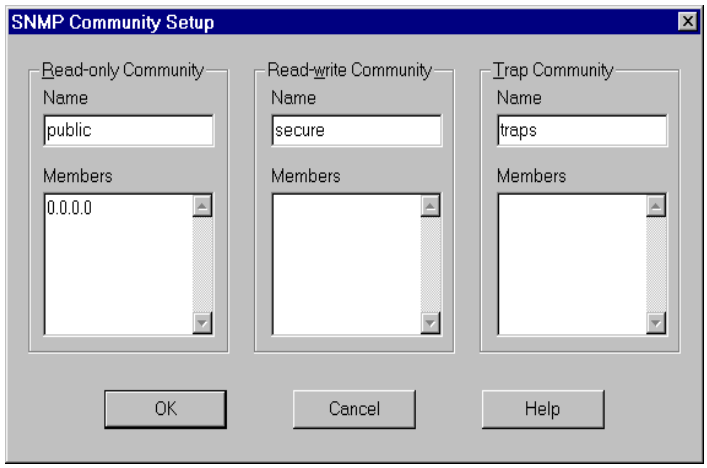
1. From the alarm window, select an existing alarm definition from the list of Alarm Definitions.
2. Make the desired changes.
3. Click on the Modify button to send the changes to the database.

Note: To cancel the changes, click on the Revert button (or select **Edit/Revert**) *before* you click the Modify button.

SNMP Community Setup

The SNMP Community Setup window is used to define the access rights for Network Management Systems wishing to access the CC MIS Partition MIB for this partition. This window is shown in the figure below.

SNMP community setup screen



This screen displays the current settings for each of the three communities defined by CC MIS. When a CC MIS partition is created, the community names are defaulted to “public”, “secure”, and “traps” for the read-only, read-write, and traps communities respectively. The members list for the read-only community will be set to 0.0.0.0, while the other two members lists will be empty.

steps Accessing the Community Setup screen

1. From the Alarms Definition window, select **SNMP/Community Setup**.

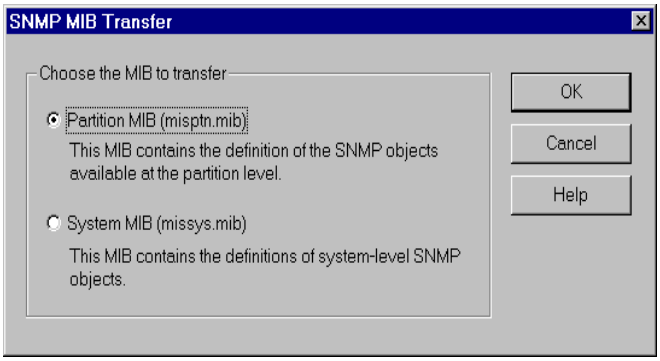
2. The SNMP Community Setup window is displayed.

SNMP MIB Transfer

The SNMP MIB Transfer window is used to download the CC MIS MIB definition files to the local PC for use with a Network Management System. These MIB definition files are text files which define all of the SNMP objects implemented by the CC MIS system.

The SNMP MIB Transfer window is shown in the figure below.

SNMP MIB transfer screen



From this window you can select either the CC MIS Partition MIB or the CC MIS System MIB to be downloaded. After you select the desired MIB and click on the OK button, a Save As window is displayed.

Use the steps below to access the SNMP MIB Transfer screen.

steps Accessing the SNMP MIB Transfer screen

1. From the Alarms Definition window, select **SNMP/MIB Transfer**.

2. The SNMP MIB Transfer window is displayed.

9 Reports

Introduction

The reporting feature of CC MIS provides you with the ability to print reports:

- in one of five categories: standard, personal, public, system, and event log
- on a schedule and ad-hoc
- on paper, on your terminal, to a file, or e-mail/fax to one or more recipients

In addition, you can create reports that can be imported into commercial spreadsheet packages.

Accessing the reporting functions

Except for scheduling a report to print, reporting abilities are provided through the Reports pulldown menu.

steps Accessing the Reports menu

1. From the CC MIS Main window, select **Reports**.
2. The Reports pulldown menu is displayed.

Generating a report

With one exception, the following steps are used in generating a report:

1. Identify the name for the report.
2. Identify the format information for the report.
3. Identify the options for the report.
4. Identify the output to destination: printer, screen, file. e-mail, or fax.
5. Select the desired values for the data selection fields.
6. Request that the report be generated immediately (ad hoc report) or be scheduled to print.

The exception is generating a system report. System reports do not require you to identify format, scope, or output device, as they provide pre-defined information.

Identifying the report format

Report formats are either standard, event log, personal, or public. The format identifies the data elements in the report.

Standard formats

The standard reports are formats provided by CC MIS. These formats generate tabular and graphic reports. The standard report formats are listed at the end of this chapter.

Personal formats

Each supervisor can create five personal formats. These formats are only available to the supervisor who creates them. Personal formats can be generated in tabular or graphic formats.

Public formats

Supervisor's with access to system administrator functions (Admin) can create public formats for all supervisors to use. These formats can generate tabular or graphic reports.

Identifying the format of the report

The format of the report refers to the following:

Time frame used to generate report
Time frame determines the granularity of the data reported and has to do with the way data is stored in the historical database. Possible time frames are interval, shift, day, week, month, and period.

Manner in which the data is reported
- by logical group
- by data and totals
- by totals only
- by using secondary groupings through the Group by ... and by... feature
- the range to be used for the data elements specified in the report format.

The data elements can be defined as a single value or a range of values for

intervals	months	subgroups	LOB codes
days	periods	ACD groups	walkaway codes
shifts	agents	ACD-DNs	logical groups
weeks			

Identify the type of report

When you identify the type of report, you either create a printed report or a data export report.

Generating a report

Creating a printed report

A printed report is a report that uses CC MIS to format the report. You may request reports that contain Totals Only or reports that contain Data and Totals. The Totals Only reports are useful when you do not need to show supporting information.

Creating a data export report

A data export report is a report that can be used by a commercial spreadsheet software package. By creating a data export report, you create a file of data records that is output to a printer or a PC. The file lists the title of the report and contains detail data only; it does not contain column headings nor column totals. When you generate a report, you can print it or have the output sent to your terminal for display.

Printing reports

When you print a report, you can direct it to a specific printer or to the default printer defined in your profile. A different printer may be defined for graphic or tabular reports. If you have the local print feature, the print goes to your local printer.

Viewing reports at your terminal

When you select screen as your output device, the report goes to your terminal. After it is complete, it may be viewed by double-clicking the report status icon on the Main window.

Note: You may need to size the viewing box so you can see the report in its entirety.

Requesting the report

After you define the report format, the scope of the data, and the output device, you may request the report, or if you have system administrator abilities, schedule the report.

Scheduling a report for printing

After you define the report, the report can be attached to a schedule and printed at a later time. You must have access to system administrator (Admin) abilities, schedule the report.

Note: Scheduled reports must have the print device set to a printer not to the screen. Otherwise, the printing of the report defaults to the customer options default printer.

Defining report parameters

You define the format, scope, output device, and manner of presenting information through the Report Parameter Definition screen. In this screen, you are given the option to name the definition and use the name as the title of the report.

The name of the report is used in menus to allow you to request the report by name, rather than recreating the report parameter definition each time you want to request the report.

Note: Ensure that the name you assign to a report is unique. CC MIS allows you to save multiple report parameter definitions with the same name.

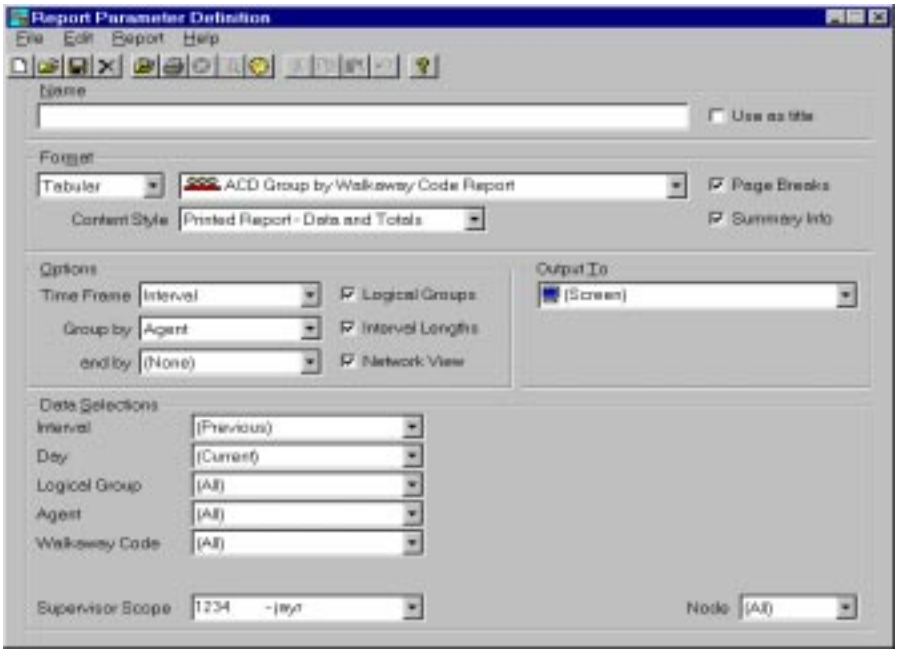
steps Accessing Report Parameters screen

1. From the CC MIS Main window, select **Reports/ Parameters**.

2. The Report Parameter Definition screen is displayed.

The Report Parameter Definition screen is shown in the figure below.

Report parameter definition screen (NAP)



Fields in the Report Parameter Definition screen

Name - This field identifies the report. (The Use as Title button in this field allows you to identify the name of the report as the title of the report.)

Format Fields:

The first field in this area allows you to select Graphic or Tabular formats.

The second field identifies the category of the report, standard, public or personal, and allows you to select a format in that category from a menu. ***Note:*** Icons indicate if the format is standard, public, or personal.

Contents Style - This third field (just below the second field) identifies if the report is to be generated by totals only, data & totals, or as data export.

Page Breaks - When selected, inserts page breaks into the report.

Language - On systems with the Language option enable, this field allows you to select the language to be used in the report.

Summary Info - When selected, a summary page is generated concerning the contents of the report.

Options Fields:

Time Frame -This field identifies the time frames for which data is collected. This field determines the granularity of data. Possible values are: intervals, shifts, days, weeks, periods, or months.

Group By And By - This field indicates secondary grouping, providing subtotals according to the chosen criteria. Possible selections from menu (depending on report) include: None, Shift, Day, Dst ACD Group, Logical Group, and Subgroup.

Logical Groups - When selected, this field indicates that you want the information grouped logically; that is, information for several different groups (defined as logical groups) summed together.

Interval Lengths - When selected, appends interval lengths to the interval time on interval reports. (For example, 12:30, 05 where the ,05 is the interval length.)

Network View - This field indicates that the Networking feature is enabled and that the time frame for the report contents will include values from the network. This provides an option for the NAP supervisor to specify how the data is collected from the remote nodes.

For example:

A NAP supervisor in Location 1 requests a previous interval report at 1700 EST. There are three nodes in the virtual network for this NAP; the first in Location 2, the second in Location 3 and the third in Location 4. Interval time frame reports allow the Network View option to be selected.

Network View enabled: The data from the previous interval relative to the local time of each node will be returned.

Node	NAP	Location 2	Location 3	Location 4
Time zone	EST	EST	CST	PST
Local time	1700	1700	1600	1400
Time requested	1630 - 1700	1630 - 1700	1530 - 1600	1330 - 1400
Interval returned		34 (1630 - 1700)	32 (1530 - 1600)	28 (1330 - 1400)

Network View disabled: The data from the (1630 - 1700) interval in each time zone will be returned. In this example, this interval has not yet occurred in Locations 3 or 4, therefore no data will be returned by these nodes.

Node	NAP	Location 2	Location 3	Location 4
Time zone	EST	EST	CST*	PST*
Local time	1700	1700	1600	1400
Time requested	1630 - 1700	1630 - 1700	1630 - 1700	1630 - 1700
Interval returned		34 (1630 - 1700)	34 (1630 - 1700)	34 (1630 - 1700)

The shaded areas indicate time ranges that have not occurred as of 1700 EST. No data will be returned by those nodes. The data from all nodes will be available as soon as the earliest time zone (in this case, PST) has completed the requested interval.

Output To:

This field specifies where the report is to be sent. Selections can include printer, screen, file, or an e-mail/fax destination. If a file destination is selected, the File Name field is displayed. If an e-mail/fax destination is selected, a Destination field is displayed. (The destination address *must* be entered in this field.)

Note: Graphical reports cannot be e-mailed or faxed.

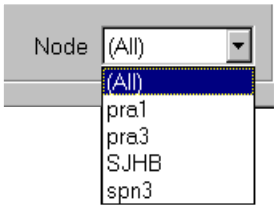
Data Selections:

This area defines ranges for data elements of the report format. For each field, you can select one of the following: All, Range, or defined lists (in applicable key fields). Interval and other time frame fields will also contain the Current and Previous selections.

Note: To select the previous time frame (such as day), you can select Previous rather than selecting Range then entering a -1.

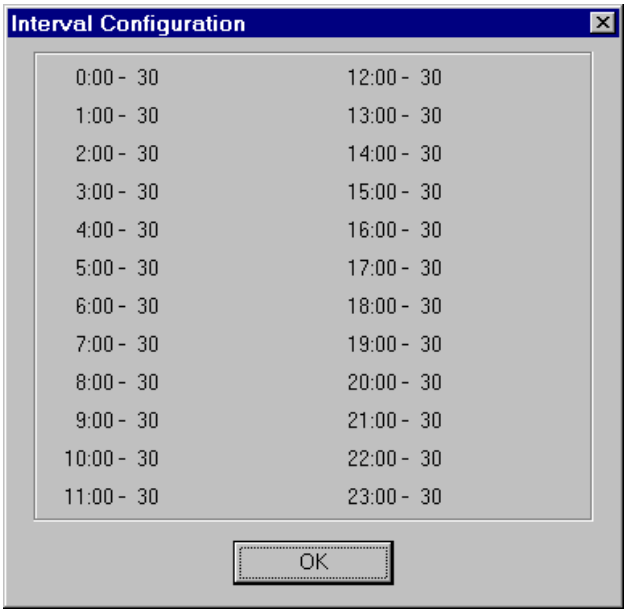
Supervisor Scope- This field identifies the supervisor scope restriction to be used for the report.

Node - On a NAP partition, the Node field is used to restrict a report to a specific node. The values for the field are selected from the pulldown menu. (This field is not displayed on local partitions.)



Interval Configuration

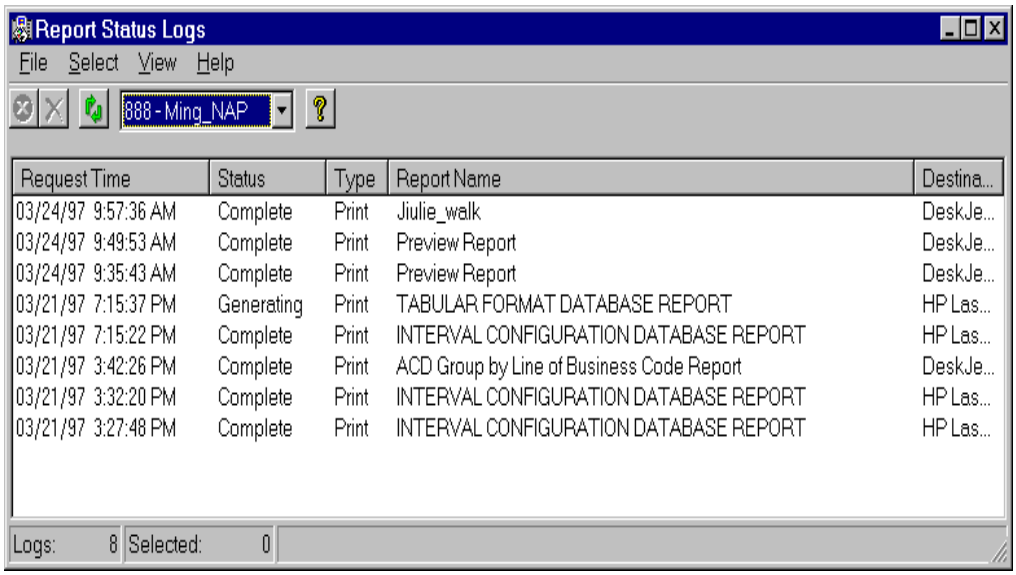
Intervals for each hour of the day are configured in the Maintenance Interface. The intervals used by your partition can be viewed while in the Report Parameters Definition window by selecting the Reports / Intervals command. The Interval Configuration dialog is displayed.



Report Status

After a report is requested, the status of the report can be viewed using the Report status logs window. This window is accessed from the Reports menu on the CC MIS Main window.

The Report Status Logs window is shown below.



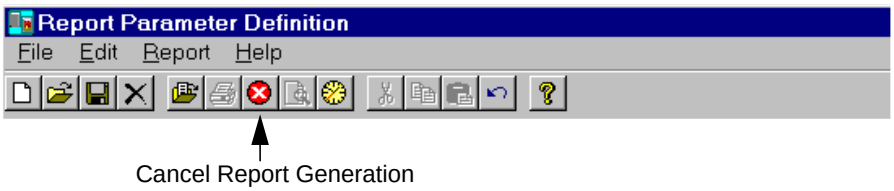
Cancelling Pending Reports

After a report is requested and is still pending, the report can be cancelled using the File/Delete command on the Report status logs window. The Report Status Logs window is accessed from the Reports menu on the CC MIS Main window.

To cancel a pending report, highlight the pending report in the list and select the File/Delete command.

Cancelling Report Generation

To cancel the generation of a report from the Report parameters screen, click on the Cancel Report button on the toolbar.



Creating a report definition

Perform the steps below to create a Report Parameter Definition.

steps **Creating a report definition**

1. From the CC MIS Main window, select **Reports/** Parameters.

2. The Report Parameter Definition screen is displayed.

3. Specify the report contents in the data fields.

4 Save the report parameters:

a. Select File / Save.
b. At the Save Report Definition As box, select the New Personal or New Public button.
c. The Save status screen will appear. Select OK.

5. From the Report Parameter Definition screen, select File / Exit.

Creating ad-hoc reports

By requesting a report, rather than scheduling it, you generate an ad-hoc report. To generate an ad-hoc report, you fill in the report parameters on the Report Parameter Definition screen, and then request the report.

Determining report status

After you request an ad-hoc report that is to be sent to the screen, the system notifies you that a report is gathering information or is pending. The system notifies you of the status of the report through the Report Status icon on the CC MIS Main window. The Report Pending status is indicated by a report with an hour glass.

Viewing a report at your desktop

Once the report arrives on your desktop, you can view it. This report remains on your desktop until you delete it or request another soft copy report. Use the steps below to view your report.

Reports sent to printers cannot be viewed on your desktop and do not affect a report that is at your desktop.

You can view a report on your screen, leaving the window containing the report open, and request a different report through the Report Parameter Screen. If the second report is sent to your screen also, you will not be able to view it until you close the window through which you viewed the first report requested.

steps

Viewing a report

1. From the CC MIS Main window, select **Reports/ View** or double-click on the Report icon.

2. The Report is displayed.

Note: You may need to resize the window and use the scroll bars to view the entire report.

Viewing the report parameters

Once a report has arrived at your desktop, you can view the report parameters that created it, in addition to viewing the report. To view the parameters, view the report, then select File / View Summary.

Generating a data export report

Generating a data export report is a simple matter of identifying Data Export Report as the Report Contents at the Report Parameter Definition screen and sending the report to an output device.

Note: This is just the format of the report being specified. After the report format is set, the report is sent to the output device. (Any report format can be sent to a PC).

The report can be sent to any output device in your system that you can access from the Report Parameter Definition screen. If the device is a printer, it prints a series of data records. If the device is a PC designated to receive files, it receives a software file that contains the series of data records.

Viewing another supervisor's report

You can view another supervisor's report from your terminal, if that supervisor has already requested the report, and the report is in their inbox.

steps **Viewing another supervisor**

1. From the display window, select **Reports / Monitor View**.

2. The system displays the Supervisor to Monitor? box. At the box, identify the supervisor, then click on OK.

If a report is available, it appears on your screen.

Generating an Event Log report

Event Log reports provide information about agent activities. Refer to Chapter 5, in the CC MIS Supervisor's Guide, for descriptions of these reports. Use the steps below to print an Event Log report.

steps

Printing an Event Log report

1. From the main window, select **Reports / Parameters**.

2. The system displays the Report Parameters screen. Identify your report parameters:

a. At the format box, click on Event Log. Select your choice.

b. At the Output Device box, select the device.

c. At the Data Selection box, provide the range for each data element.

d. Select **Report / Generate**.

e. Select **File / Exit**.

Printing a system report

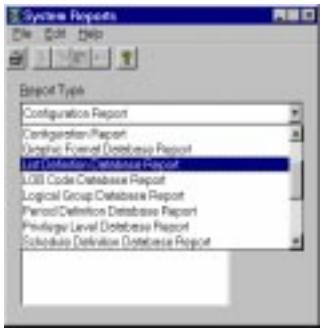
System reports provide information derived from the system database. As a result, they do not require that you define the report parameters for them. The system reports are as follows:

- Configuration Report
- Supervisor Database Report
- Privilege Level Database Report
- Scope Database Report
- Agent Database Report
- Alarms Definitions Database Report
- ACD Group Database Report
- Threshold Definition Database Report
- Shift Definition Database Report
- Period Definition Database Report
- Schedules Definition Database Report
- Logical Group Database Report
- LOB Code Database Report
- Interval Configuration Database Report
- Walkaway Code Database Report
- ACD-DN Database Report
- Graphic Format Database Report
- Tabular Format Database Report

System reports can only be printed; they cannot be viewed on your screen. However, if the PC is set as the default printer, then the report will be sent to the PC. You request these reports through the System Reports screen.
Note: There are three system reports that allow you to define the range of the report. They are the Supervisor Database Report, Agent Database Report, and ACD Group Database Report.

steps Printing a system report

1. From the display window, select **Reports / System Reports**.



2. Identify the report.

a. From the System Reports screen, click on the drop down box arrow. Select your report from the list of options.

b. If prompted for additional information, select from your list of options.

3 Print the report.

a. Select the **File / Print** option (or press Print button on toolbar).

4. Exit to CC MIS Main menu.

a. Select **File / Exit** to the main window.

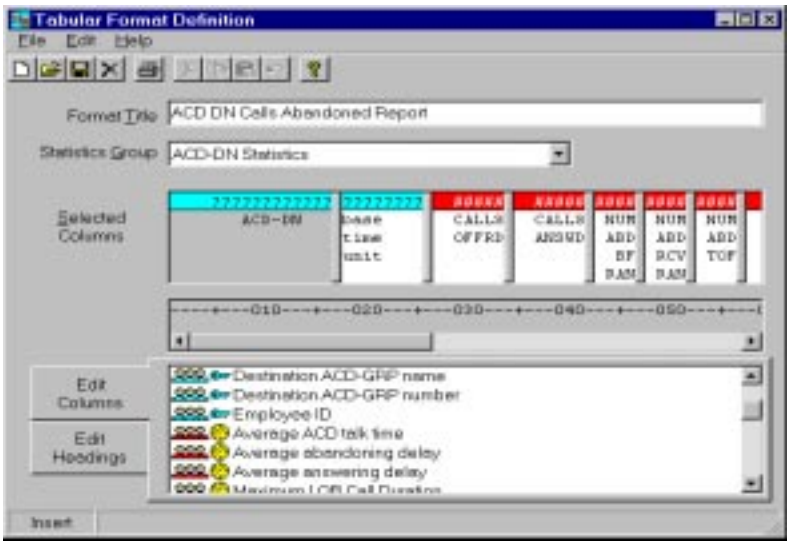
Customizing Reports

You can create personal (custom) tabular or graphic formats for a report. Use the steps below to access the format screens.

Tabular formats

The tabular report formats screen is used to define personal or public tabular formats. Formats defined on this screen can be read into the Report Parameter Definition screen. The tabular report formats screen is shown below.

Tabular report format screen



Field descriptions

Format Title - Specify the title for the format. The name entered in this field will appear in other menus and serves as a default report title unless a report title is specified in a report parameter definition. Accepts up to 55 characters.

Statistics Group - Specify the statistical group: Destination ACD-GRP, Overflow, Agent, LOB Code, ACD-DN, or Walkaway statistics.

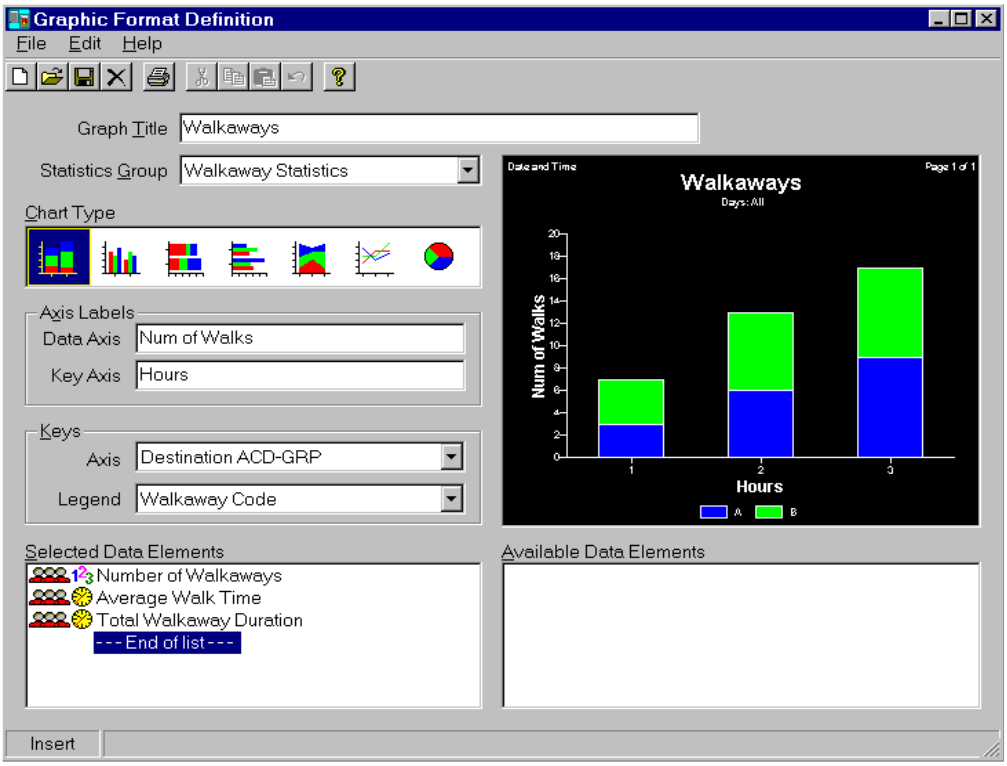
Custom Headings - Specify desired custom heading. Selection can be made by selecting standard headings listed in the lower list portion of the screen, then modifying as desired. The text entered in this field(s) will appear on the report as headings above the data.

Column Selections - Specify desired statistics. Press F3 and use the arrow keys to scroll menu.

Graphic formats

The graphic report formats screen is used to define personal or public graphic formats. Formats defined and saved from this screen can be read into the Report Parameter Definition screen. The graphic report formats screen is shown below.

Graphic report format screen

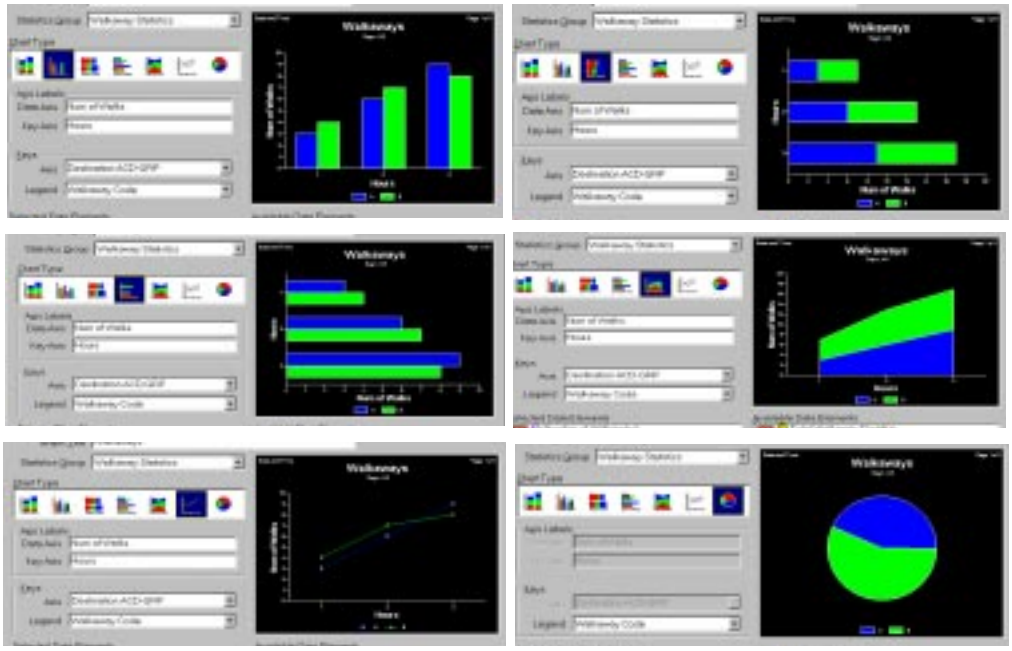


Field descriptions

Graph Title - Specify the title for the graph.

Statistics Group - Specify the statistical group: Destination ACD-GRP, Overflow, Agent, LOB Code, ACD-DN, or Walkaway statistics. Click on the down arrow and select the statistics group from the menu.

Type of Chart - Specify the chart type for the graphic format. The screen is redrawn with fields applicable to the type of chart selected (as shown in the figure above and six types shown below).



After the type of chart is selected and the screen is redrawn, the graphic image of the chart is displayed on the screen.

Axis Labels - Specify the data and key axis labels for the chart.

Keys - Specify the axis and legend keys for the chart.

Data Elements:

Available Data Elements - This is a list of available statistics that can be added to the graph.

Selected Data Elements - This is a list of statistics that have been added to the graph.

Note: To select an available data element and have it appear on the graph and in the selected list, you can double click the left mouse button on the desired data element or drag-and-drop the element from the Available to the Selected column.

Printing custom reports

You can print personal (custom) tabular or graphic formats for a report. Use the steps below to generate the report.

steps

Generating custom reports

From the Main window:

1. Select **Reports / Parameters.**
2. The system displays the Report Parameter Definition screen.
3. Select your custom format. Complete other fields settings on the definition screen.
4. To print, select **Report / Generate.**
5. To save as a new personal report, select **File / Save As**, then select New Personal in the dialog box.

Spectrums

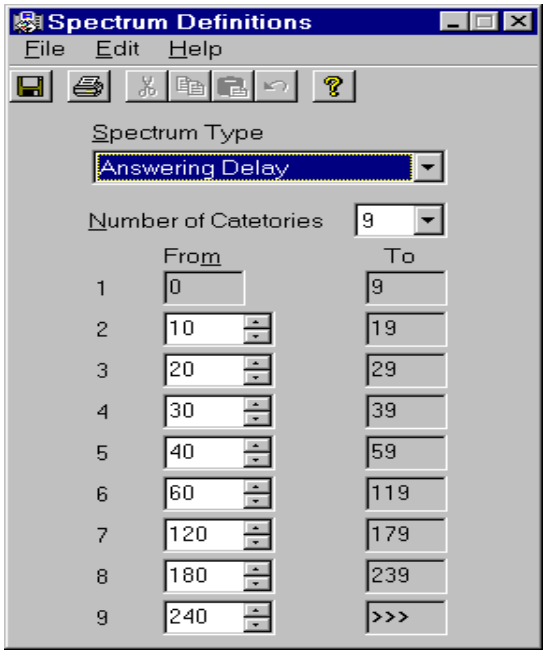
The Spectrum Definition screen allows you to define categories into which incoming calls are placed based on the delay experienced or the duration of the call. Up to ten categories can be defined for each of the three available spectrums.

Spectrums are used in the following standard reports:

- Delay Before Answering
- Delay Before Abandoning
- Call Duration

The individual categories are also available for custom reports in ACD Group Statistics.

The Spectrum Definition window is shown in the figure below.



Listing of standard report formats

The following tables provide a listing the standard report formats.

Table 1: Standard report formats

Standard Format	Explanation
ACD Call Duration	Identifies the duration of a call by measuring from when the call is answered by the agent until the call is released by the agent.
ACD-DN Calls Abandoned	Identifies the total number of calls abandoned per ACD-DN and the total abandon delay.
ACD-DN Calls Answered	Identifies the total number of calls answered per ACD-DN and the total answer delay.
ACD Group by Agent Performance	Identifies agent activities for each group. This report can tell if there is a problem with a particular agent or if all agents are experiencing the same difficulties.
ACD Group by Agent Transfer	Identifies agent transfer activities for each group.
ACD Group by LOB Code	Identifies the number and duration of calls by LOB code for each group.
ACD Group by Walkaway Code	Identifies the walkaway codes associated with a specific ACD group.
ACD Group Overflow	For each source and destination ACD group pair, indicates the number of calls that either queue overflowed (for example, due to exceeding maximum wait or queue size) or time overflowed from the source to the destination.
ACD Group Transfer-In	Identifies the number of calls that were transferred in to a group.
ACD Group Transfer-Out	Identifies the number of calls that were transferred out of a group.
Agent Summary	Provides detail regarding the types of calls received/ made and the amount of time spent for each agent.
Agent by ACD Group Performance	Identifies the activities of all agents sorted by Agent ID trough ACD group.
Agent by LOB Code	Identifies the activities of all agents sorted by LOB codes.
Agent by Subgroup Performance	Identifies the performance of each agent under different subgroups.
Delay Before Abandoning	Identifies how many calls were abandoned and how long the callers waited before they hung up.
Delay Before Answering	Provides information about the service callers receive.

Table 1: Standard report formats

Standard Format	Explanation
LOB Code by ACD Group	Identifies call processing time for each LOB code. Breaks down information to show which ACD group received the calls associated with the LOB code.
LOB Code by Agent	Identifies call processing time for each LOB code. Breaks down information to show the LOB codes associated with specific agents.
Summarized ACD-DN Call Analysis	Identifies the ACD-DNs and summarizes the associated call activity.
Summarized ACD Group Call Analysis	Provides an overall analysis of an ACD group. Shows how calls were handled and maximum and average delays and call durations.
Summarized ACD Group Performance	Identifies groups in the system and summarizes group load performance. It shows the actual number of calls each group answered and the average time it took to handle each call.
Summarized ACD Group Transfer	Identifies the groups and summarizes transfer information for the groups.
Subgroup by Agent Performance	Provides supervisors with performance information for their agents.
Walkaway Code by ACD Group	Identifies the reason for and the total time spent in walkaway state by an agent in a specific ACD group.
Walkaway Code by Agent ID	Identifies the reason for and the total time spent in walkaway state by an agent.

Table 2: Standard graphical reports

Standard Format	Explanation
ACD Group Calls Abandoned Graphic	For each ACD Group, shows how many calls were abandoned before and after receiving a recorded announcement.
ACD Group Calls Answered Delay Graphic	For each ACD group, shows how many calls were answered before and after the delay objective.ACD Group Calls Answered Delay Graphic
ACD-DN Calls Abandoned Graphic	For each ACD-DN, shows how many calls were abandoned before and after receiving a recorded announcement.
ACD-DN Calls Answered Delay Graphic	For each ACD-DN, shows how many calls were answered before and after the delay objective.

10

Configuration Control

Introduction

Configuration control allows you to view and adjust parameters inside the ACD switch that relate to operating functions such as traffic control and staffing. CC MIS provides two modes of security that allows supervisors to have control over access to Configuration Control screens and system administration: Privilege Level Definition and Scope Definition.

Networked CC MIS

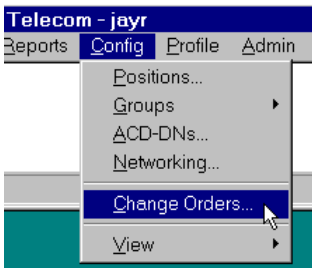
When the Networking feature is enabled, the Configuration Control screens contain a Node field and the Insert dialogs allow for Node selection. The Node field is used to identify the node of the position or group. The node selection function allows you to select a node, then insert positions or groups listed under the node selected.

Note: The APR feature is not available for Network Access Partitions. Therefore Configuration Control screens that display the Node field will not display the APR fields.

Accessing configuration control functions

The CC MIS configuration control (load management) functions are accessed from the Config pulldown menu. The Config menu is selected on the CC MIS Main window.

steps Accessing the Config menu



1. From the CC MIS Main window, select **Config**.

2. The Config pulldown menu is displayed.

Select the desired function from the menu.

Ad hoc Load Management screens

Ad hoc Load Management screens are screens you enter to make and execute immediate Load Management changes. The screens for Positions, Groups, ACD-DNs, and Networking all follow the same format and have the same available commands.

Screen functionality

The following terms are used when describing the Configuration Control screens:

Cell - A cell is a row and column location in the data portion of the screen.

Key field or column - The left-most column of the data portion of the screen is referred to as the key field or key column.

Key - The data (or type of data) that is in the left-most cell of any row.

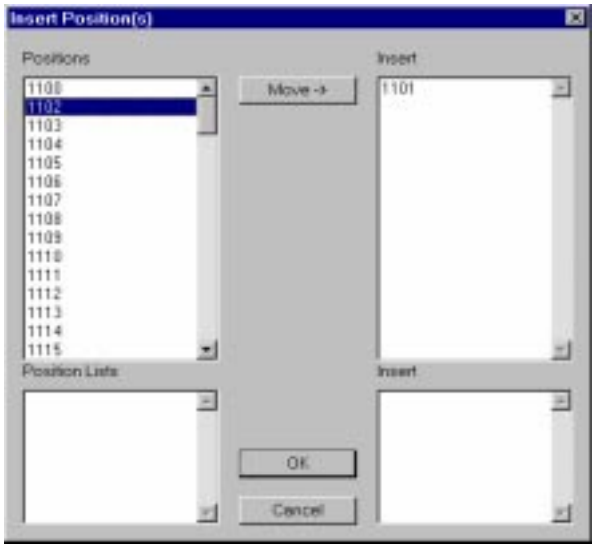
Null cell - The bottom cell that serves as a place holder to allow new cells to be inserted. No data can be associated with this cell.

Configuration Control screens are initially displayed with a cursor positioned in the upper left corner cell of the data portion of the screen. There are five types of keys: ACD Groups, Positions, ACD-DNs, Agent IDs, and ACD Group Pairs.

Insert Dialog Box

The Insert Dialog Box is displayed by selecting the Insert option from the Edit menu or by pressing the Insert key on your keyboard. Keys and their associated data are inserted into the screen by means of the Insert Dialog Box. The contents of the Insert Dialog is dependent on the type of screen currently displayed. The Insert Dialog Box is shown below.

Insert dialog box



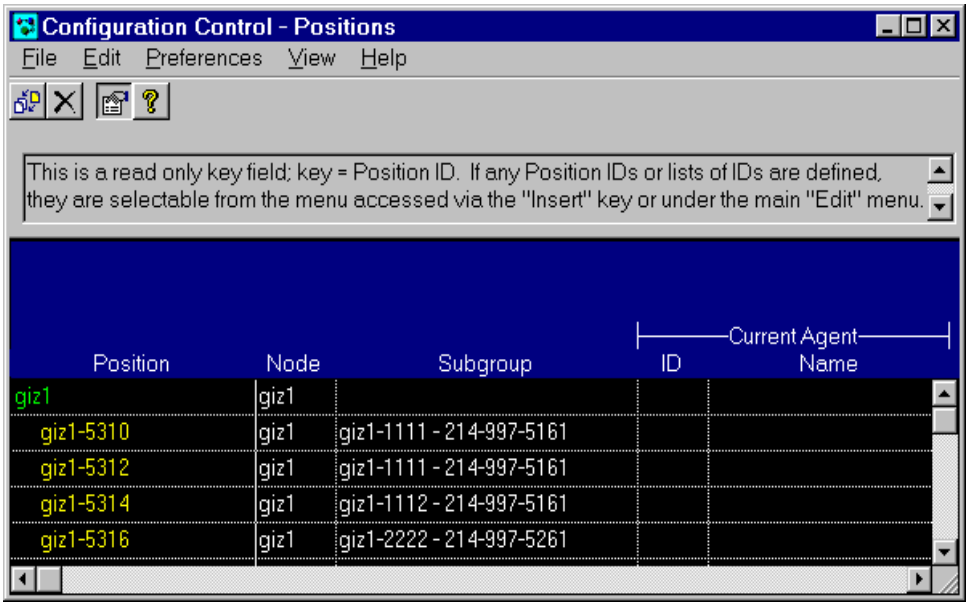
Changing agent position assignments

The Config / Positions option allows you to view or change the supervisor and ACD group assignments of specified agent-positions. The changes made in this option alter Table KSETFEAT.

Note: Asterisks (***) appearing in a field of a Configuration Control screen indicates that the area can only be changed on the DMS-ACD switch.

Change Positions Assignments screen is shown below.

Change position assignment screen



Show Changes

The default setting for this box is checked. This setting (indicated by an checkmark) allows the user to see the changes made to any of the fields on the screen. When the check indication is removed, the screen displays the original data on the screen. (Changes made are still available even though they are not displayed on the screen.) Click on the box (check it) to display the changes.

Position Assignments screen fields

Position- Identifies an existing agent position ID. Use the **Edit/Insert** option to insert positions. (Positions are up to 4 digits in length.)

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

ACD Group - Identifies the new ACD group to which the agent is to be assigned. Valid entries are the primary DN of an ACD group or ACD group name.

Subgroup - Identifies the subgroup identified by supervisor ID to which the agent is to be assigned.

APR Subgroup - Identifies the Automatic Position Reassignment (APR) subgroup of the current agent. This field is displayed only if the current subgroup doesn't match the APR subgroup and APR is enabled in Customer Options. (This field is displayed only if the APR feature has been enabled and you are not logged into a Network Access Partition.)

Current Agent - Displays the agent’s ID and Name currently logged in to that position. No input is accepted.

Moving an active position to a new group

Moving an active position to a new group will result in:

1. The real-time statistics will immediately reflect the agent's activity in the new group.

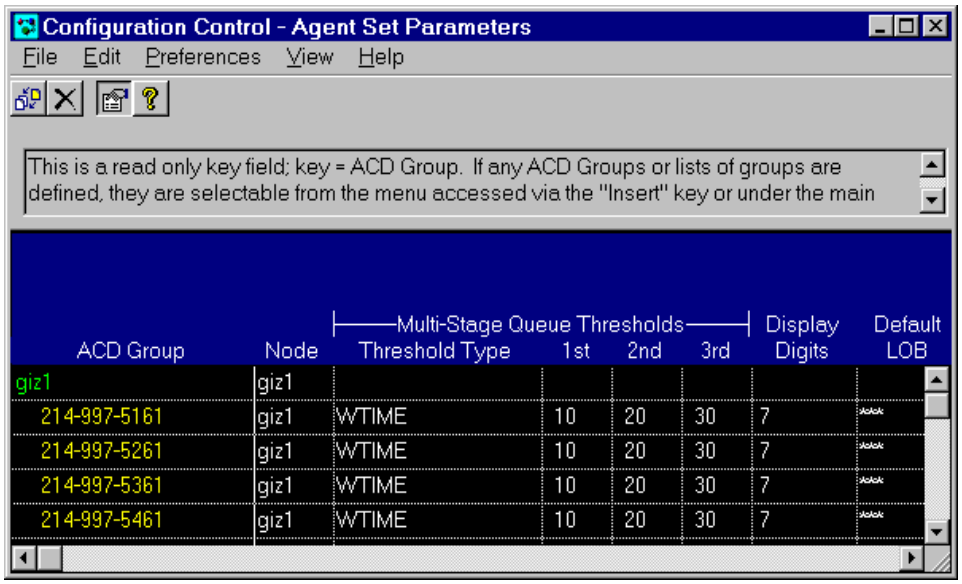
2. Call completion counts and durations will be pegged against the new group. LOB statistics will be pegged to the group/supervisor. (This may result in an undefined lob code for the new group.)

Changing agent set parameters

Using the Config / Groups / Agent Set Parameters option you can change the multi-stage queue threshold settings, the number of display digits, the default line of business (LOB) code and the ACD group wrap-up time for agent sets. Changes made alter Table ACDGRP.

The Agent Set Parameters screen is shown below

Agent set parameter screen



Note: An asterisk (***) appearing in a field of a Configuration Control screen indicates that the field can only be changed at the DMS-ACD switch.

Agent Set Parameters screen fields

ACD Group -Identifies the name or DN number of an existing ACD group. Accepts as input (using Edit/Insert) any existing ACD group name, ACD group list name, or ACD group by its primary DN.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

Multi-Stage Queue Threshold Type - Identifies whether the Multi-Stage Queue ranges are associated with call queue size or call wait time. The valid values are QSize or WTime.

Multi-Stage Queue Threshold - Identifies three threshold values representing indicators on agent sets. Each threshold depends on the threshold type (either wait time or queue size).

Display Digits - This field specifies the number of digits displayed to agents in the ACD group. The range is 0-10 and is selectable from a menu.

Default LOB - LOB means line-of-business code for the ACD group. A valid range is 0-999.

Wrap-Up Time - The group wrap-up time defines the default amount of time an agent is unavailable following the handling of an ACD call. (This is considered as agent not-ready time and is pegged as variable wrapup time and shown as VARWRAP on Agent Status screen). A valid range is 1-600 seconds.

Note: Agent wrap-up time will override the default wrapup time if it is datafilled in the ACD Table ACDLOGIN or ACDENLOG.

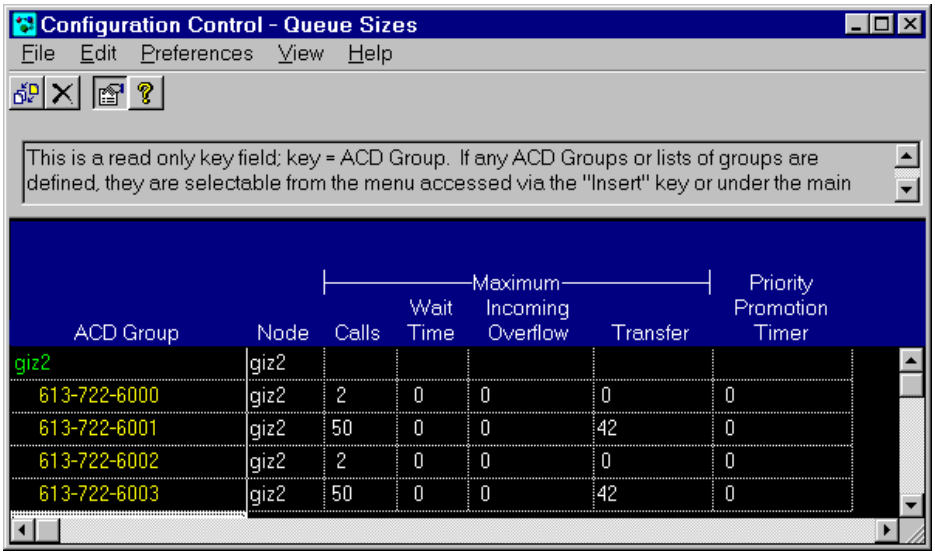
Changing queue size parameters of an ACD group

The Config / Groups / Queue Sizes option lets you view or change the queue size parameters of specified ACD groups. Changing fields in this option alters the Table ACDGRP.

Note: If you are running under BCS35 protocol, the MAXCQLMT and MAXVQLMT options must be datafilled on the switch in order to change queue sizes. If either of these are not datafilled, you will get the error message," Max Call Queue threshold value exceeds limit" or " Max Virtual Call Queue threshold value exceeds limit", respectively.

The Queue Sizes screen is shown below.

Queue size screen



Note: An asterisk (***) appearing in a field of a Configuration Control screen indicates that the field can be changed only at the DMS-ACD switch.

Queue Size screen fields

ACD Group - Identifies the name or DN number of an existing ACD group. Accepts as input any existing ACD group name, or ACD Group list name. Primary ACD-DNs may also be entered.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

Maximum Calls - Identifies the maximum number of calls that can be queued in this ACD group's incoming call queue at any one time. Accepts as input any number from 0 to 511 inclusive. A zero value means that this ACD group does not have call queuing, but will route to the table specified in either the Threshold Route or Overflow Targets fields in the Overflow Targets screen.

Maximum Wait Time - Identifies the maximum number of seconds that a call can be held in the incoming call queue before being answered by an agent. Accepts as input any number from 0 to 1800 seconds.

Maximum Incoming Overflow - Identifies the maximum number of logical calls that can be queued. Accepts as input any number from 0 to 511 inclusive.
Maximum Transfer - Identifies the maximum number of calls that can be transferred to agents in this ACD group. Accepts as input any number from 0 to 42 inclusive.

Note: The Call Transfer Queue Size is dependent on the maximum call queue size for your group. Normally, the range is 0 to 42, but if the maximum call queue size is set to less than 42, you cannot exceed that value.

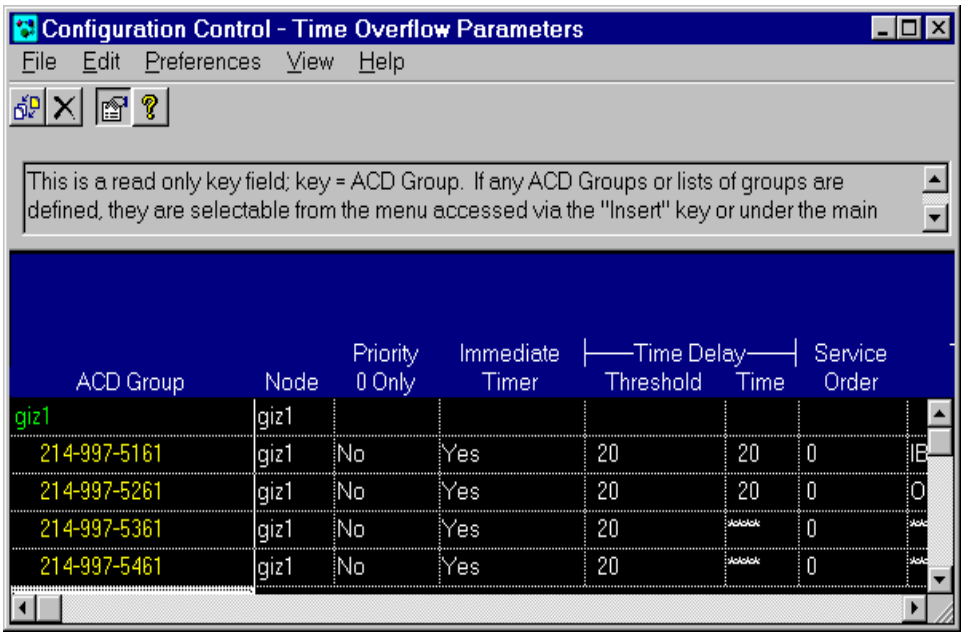
Priority Promotion Timer - Identifies the maximum amount of time an unanswered call can remain in a particular priority queue. When the call exceeds this timer value, then it is promoted to the next higher priority queue. Accepts as input any number from 0 to 255 inclusive. A zero value means that priority promotion time out does not apply.

Changing time overflow parameters of an ACD group

The Config / Groups / Time Overflow option allows you view or change the time overflow parameters of specified ACD groups. This option alters the Table ACDGRP.

The Time Overflow Parameters screen is shown below.

Time overflow parameters screen



Note: An asterisk (***) appearing in a field of a Configuration Control screen indicates that the field can be changed only at the DMS-ACD switch.

Time Overflow screen fields

The Time Overflow screen contains the following fields:

ACD Group - Identifies the name or DN number of an existing ACD group. Accepts as input any existing ACD group name, or ACD group list name. Primary ACD-DNs can be used.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

Priority 0 Only - Identifies that only priority 0 calls have time delay overflow. Accepts as input either yes or no. If no, then all calls have time delay overflow.

Immediate Timer - Identifies that timing for time delay overflow starts as soon as calls are received. Accepts as input either yes or no.

Time Delay Threshold- Identifies the time delay overflow threshold that is applied to either all calls or priority 0 calls only. Accepts as input 0 to 1800 inclusive.

Service Order - Identifies the order in which the call queues are serviced. Accepts as values:

0 = Outflow calls, then inflow calls, then calls queued within priority

1 = Outflow calls, then priority 0 calls, then inflow calls, then other calls queued within priority

2 = Oldest call of either the physical or logical queue

Time Delay Time - Identifies the amount of time in seconds a time delay overflowed call remains in queue before being rerouted to the Time Delay Threshold Route. Accepts as input 0 to 1800.

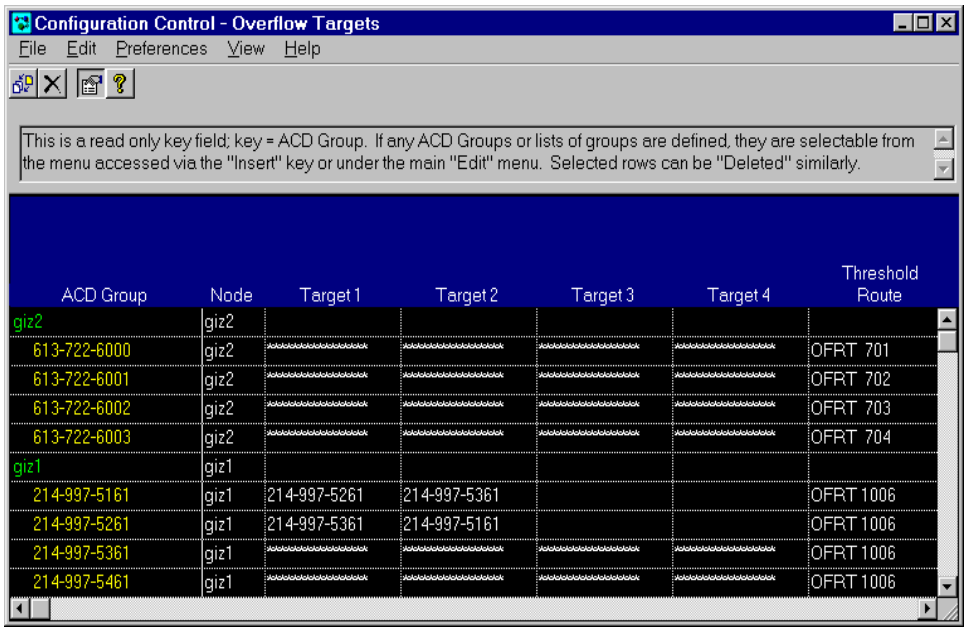
Threshold Route - Identifies the route used for rerouting time delay overflow calls. Accepts as input Table OFRT or IBNRTE and 0 to 1023.

Changing the overflow targets for an ACD group

The Config / Groups / Overflow Targets option allows you view or change the overflow targets of specified ACD groups. The changes made in this option alters Table ACDGRP.

The Overflow Targets screen is shown below.

Overflow targets screen



Overflow Targets screen fields

ACD Group - Identifies the name or DN number of an existing ACD group. Accepts as input any existing ACD group name, or ACD group list name. Primary ACD-DNs can be used.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

Overflow Targets - Identifies up to four targets to enhance overflow. Accepts the primary DN of an ACD group or a group name as input.

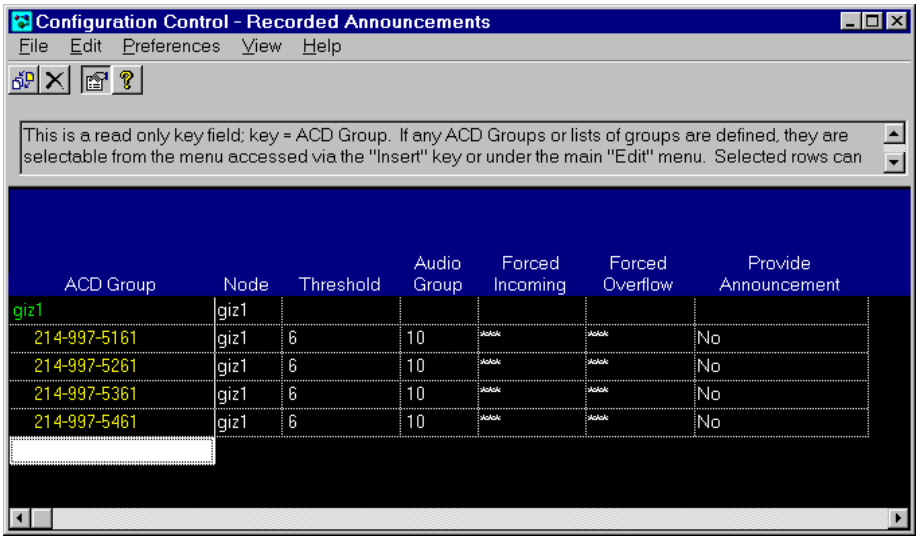
Threshold Route - Identifies the route used for rerouting time delay overflow calls.

Changing recorded announcements parameters - ACD group

The Config / Groups / Recorded Announcements option allows you view or change parameters for the recorded announcements (RAN) of specified ACD groups. The changes made in this option alters the Tables ACDGRP and AUDIO.

Recorded Announcements screen is shown below.

Recorded announcements screen



Recorded Announcements screen fields

ACD Group - Identifies the name or DN number of an existing ACD group. Accepts as input any existing ACD group name or ACD group list name using the Edit / Insert option. Primary ACD-DNs can be used.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

Threshold - Identifies how long the incoming call waits in queue before receiving a recorded announcement. If this value is 0, then the caller receives an announcement immediately upon entering the incoming call queue for this ACD Group and does not receive a ring (RINGING field in table ACD Group = No). Accepts as input 0, 6-60.

Audio Group - Identifies the audio group, which in turn identifies the choices (MUSIC, SILENCE, ANN, and REPEAT), and the number of times these recorded announcement choices should play to queued calls in this ACD group. If the existing value in the Audio Group field is 0, then the DMS-ACD does not have a defined audio group for the related ACD group. Accepts as input 1-512.

Forced Incoming - Identifies the audio group to be used to give forced incoming announcements to new incoming ACD calls. Accepts as input:
1 - 512.

Forced Overflow - Identifies the audio group to be used to give forced overflow announcements for deflected ACD calls. Accepts as input 1-512.

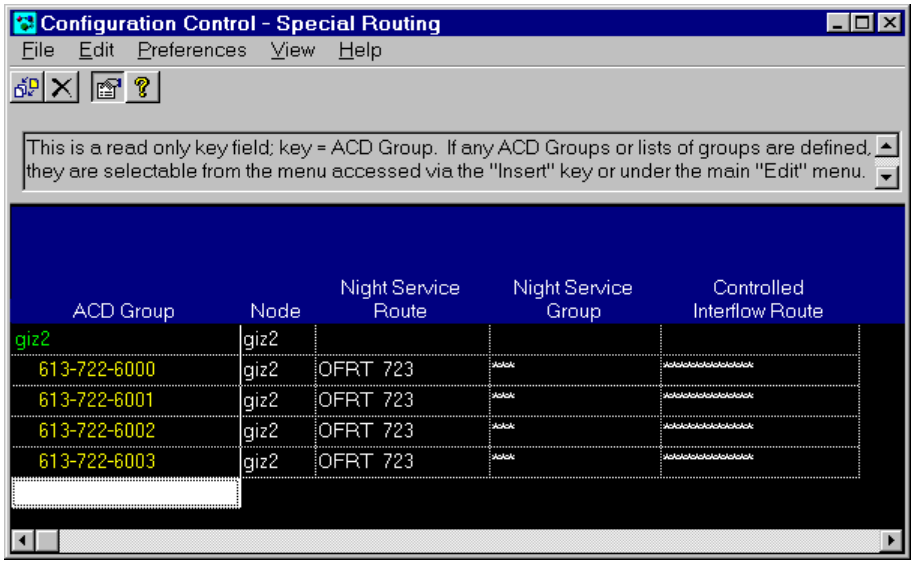
Provide Announcements - Specifies if the ACD group should provide forced incoming announcements and delay announcements for calls overflowing into this group. Indicate Yes or No. (This specifies which announcement the caller will hear: either those from the original group called or from the group to which the caller is overflowed.)

Changing special routing parameters for an ACD group

The Config / Groups / Special Routing option allows you view or change the night service and control interflow parameters of specified ACD groups. The changes made in this option alters Table ACDGRP. ACD activates the night service feature when all agents in an ACD group have logged off their set. All calls residing in the incoming call queue at this time remain in queue (unless call queue clearing ACD feature is active) until the caller disconnects, but no new incoming calls are received by this ACD group. The supervisor can activate the night service and controlled interflow features.

The Special Routing screen is shown below.

Special routing screen



Special Routing option screen fields

ACD Group - Identifies the name of an existing ACD group. Accepts as input any existing ACD group name or ACD group list name using the Edit / Insert option. Primary ACD-DNs can be used.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

Night Service Route - Identifies a table name and an index number to which this ACD group routes night service calls. Accepts as input either OFRT or IBNRTE and an existing index number.

Night Service Group - Identifies the Audio Group is used to provide a night service announcement to callers prior to rerouting the call to the night service route. Accepts as input 1-512.

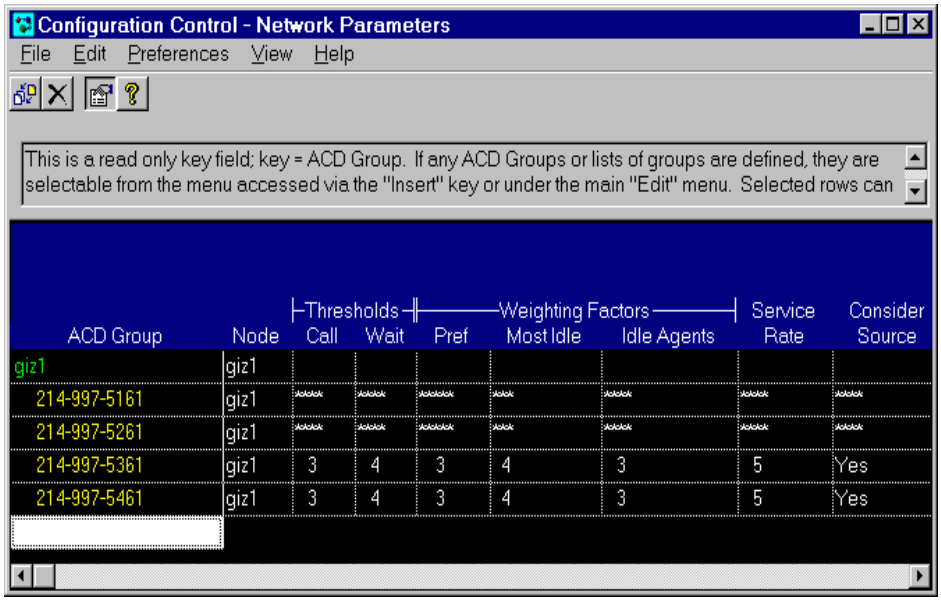
Controlled Interflow Route - Identifies the route the calls will take when the supervisor has put the group into controlled interflow mode. Values for this field are tables OFRT and IBNRTE and index ranges 0-1023.

Changing network parameters for an ACD group

The Config / Groups / Network Parameters option allows you change various parameters that are used in networking ACD groups (NACD) together. The changes made in this option alters Table NACDGRP.

The Network parameters screen is shown below.

Network parameters screen



Note: An asterisk (*) appearing in a field of a Configuration Control screen indicates that the field can be changed only at the DMS-ACD switch.

Network Parameters option screen fields

ACD Group - This field identifies the name or number of the ACD Group. Primary ACD-DNs can be displayed in this field.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

Call Threshold - This field can change the queue threshold with a range of 0-511.

Wait Threshold - This field can change the maximum wait threshold with a range of 0-1800.

Preference Weighting Factor - This field shows the group preference weight factor with a range of 0-32767.

Most Idle Agent - This is the factor used in calculating the Resource Index for the group with a range of 0-600.

Num Idle Agent - This is the factor used in calculating the Resource Index for the group with a range of 0-255.

Service Rate - This is the average service rate (call handling time) for the group with a range of 0-600.

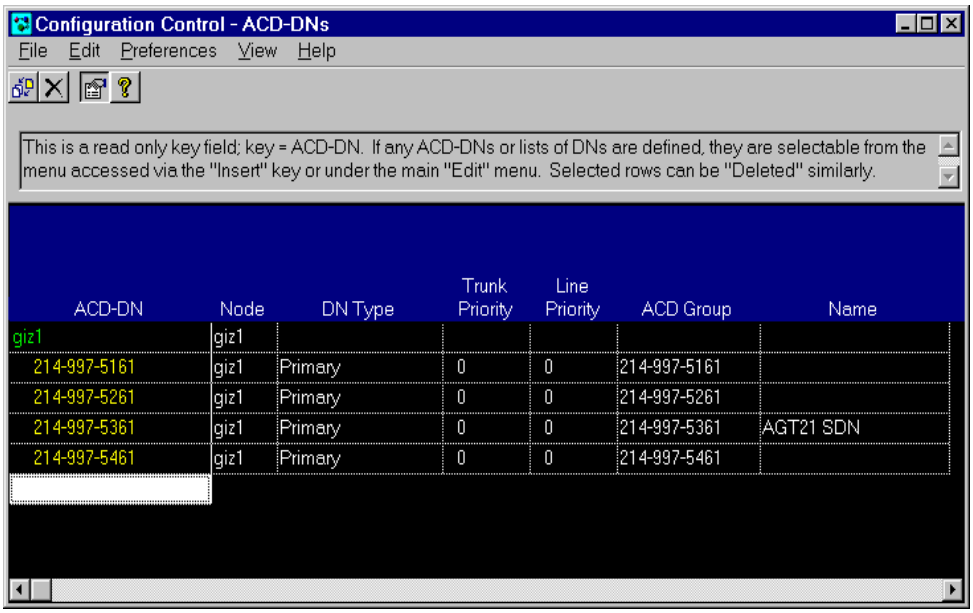
Consider Source - This field specifies whether the source group should be considered when determining the best target group for time overflow calls. The values are Yes or No.

Changing ACD-DN assignments and priorities

The Config / ACD-DNs option allows you change trunk priorities for specified ACD-DNs, the line priorities of primary DNs, the group assignments of supplementary DNs and the name of the ACD-DN. The changes made in this option alters the Tables DNROUTE and DNATTRS.

The Change ACD-DNs Assignments and Priorities screen is shown below.

ACD-DN assignments and priorities screen



ACD-DNs screen fields

ACD-DN - Identifies the existing ACD-DN number. Accepts as input any existing ACD-DN number or ACD-DN list name using the Edit / Insert option.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

DN Type - Identifies the DN as a primary or supplementary DN. Each ACD group receives calls from up to 17 ACD-DNs. Within each ACD group there is one primary and up to 16 supplementary ACD-DNs. This field does not accept input.

Trunk Priority - Identifies the priority for ACD calls coming in over trunks. Accepts as input 0 to 3 inclusive, where 0 is the highest priority and 3 is the lowest priority.

Line Priority - Identifies the priority for ACD calls coming in over lines or for ACD calls originated from within the same switch. Accepts as input 0 to 3 inclusive, where 0 is the highest priority and 3 is the lowest priority. The field is left blank and is not accessible if the DN type is Supplementary.

ACD Group - Identifies the name or number of an existing ACD group that processes calls for this ACD DN. Accepts as input any existing ACD group name or ACD Primary DN.

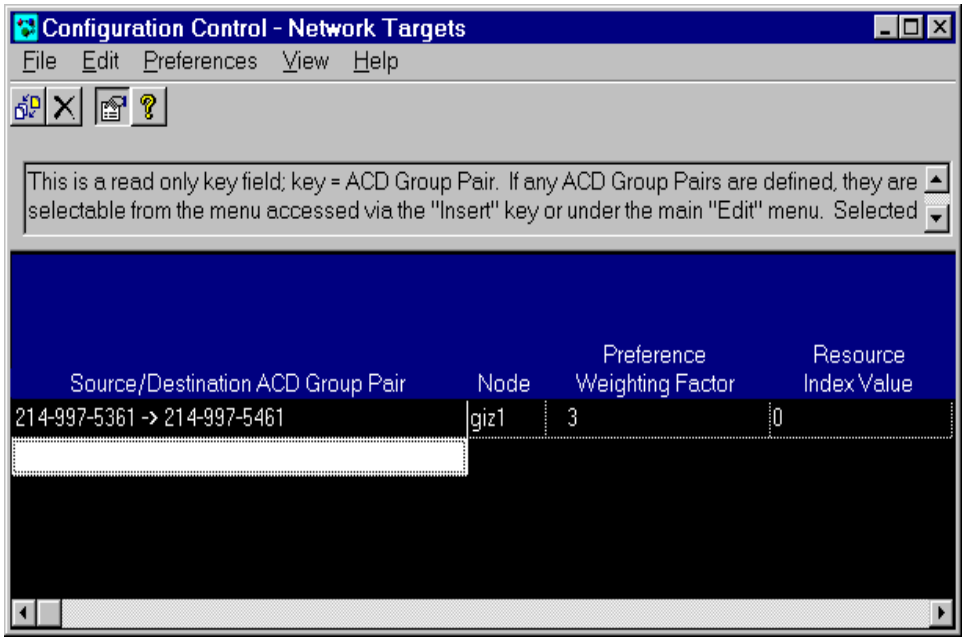
Name - Identifies the name of the ACD-DN. Accepts input as 15 character or less. This name is not used by CC MIS.

Changing network targets

The Config / Networking option allows you set the Preference Weight Factor for networked ACD groups. (You can also set the Resource Index for networked groups on non-DMS switches.) The changes made in this option alters Tables NACDGRP and REMNACD.

The Network Targets screen is shown below.

Network targets screen



Network Targets option screen fields

Source/Destination ACD Group Pair - This field identifies the destination ACD groups that are network targets of the source ACD group. There can be a total of 48 destination groups per source ACD group.

Node - Identifies the node on which the group resides in the network. This field is display only when the Networking feature is enabled.

Preference Weighting Factor - This field allows you to change the Preference Weight Factor for the source / destination ACD group pair. The range of this field is 0-32767.

Resource Index Value - This is the current Resource Index for the destination ACD group. (This is a display only field.)

Using Configuration Control efficiently

Configuration Control has several features that allow you to use configuration control efficiently. These features are:

- defining change orders rather than ad hoc requests
- defining lists
- viewing the transaction log

You define change orders to:

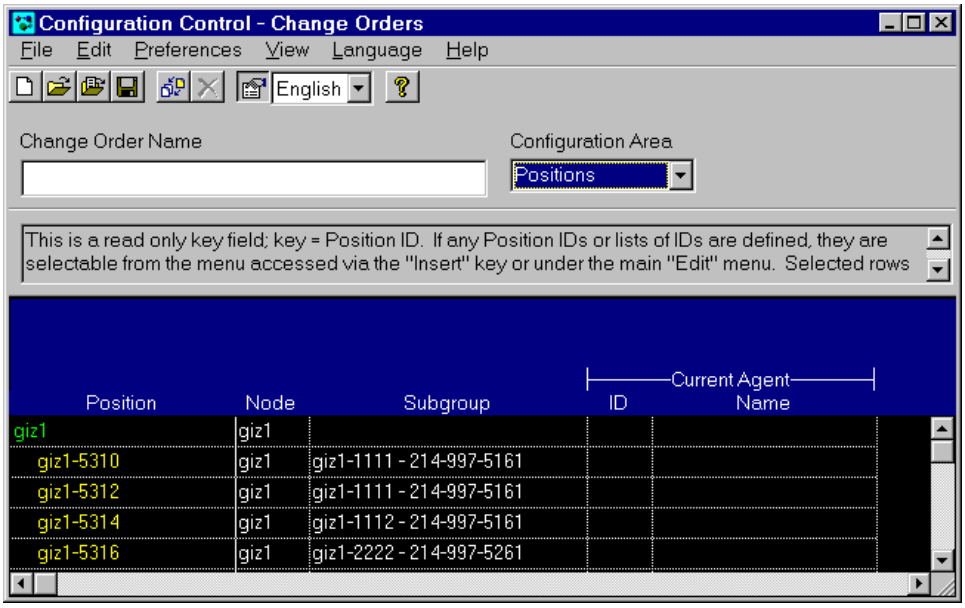
- schedule the changes
- initiate several changes on one schedule
- define changes you use frequently

When you define a change order, you group a set of Configuration Control changes together and reference them by the change order name. You have the option to either execute these change orders immediately or schedule the changes for execution at either a later date and time or at recurring intervals.

Note: CC MIS allows you to save multiple change orders with the same name. If you are modifying an existing change order, use the Overwrite an existing change order command to prevent the system from saving different change orders with the same name.

The Change Orders screen is shown below.

Change orders screen



Use the View / Transaction Log and View / Execution Queue options to monitor the status of your changes.

Note: You must have System Administrator abilities (access to Admin) to schedule the change order.

Viewing Configuration Control database tables

You can view the data tables through the Config/View or View menus.

Configuration Control database tables

Route List - Displays the route list for all ACD Groups in the current configuration. After the initial screen displays, you can use the page-up and page-down keys or scroll bar to scroll through the table.

Audio List - Displays the audio list for all ACD Groups in the current configuration. After the initial screen displays, you can use the page-up and page-down keys or scroll bar to scroll through the table.

OFRT Table - Displays all defined entries in the OFRT table. After the initial screen displays, you can use the page-up and page-down keys to scroll through the table. (See the following Supported Routes and Supported Selectors.)

IBNRTE Table - Displays all defined entries in the IBNRTE table. After the initial screen displays, you can use the page-up and page-down keys to scroll through the table. (See the following Supported Routes and Supported Selectors.)

Audio Table - Displays all defined ACD entries in the Audio table. After the initial screen displays, you can use the page-up and page-down keys to scroll through the table.

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reports

Printing Reports

The reporting feature of CC MIS provides the ability to print reports:
a). in one of five categories (standard, personal, public, system, and event log)
b). on a schedule and ad-hoc
c). on paper, as a fax, to file, or terminal

Note: Scheduling and terminal viewing does not apply to system reports.

Report Parameter Definition Screen

Select **Reports** then the **Parameters** option. There are five steps in generating a report.

1. Identify report format.
2. identify scope of data for report.
3. Identify report and its contents.
4. Identify output device.
5. Request report to be printed or scheduled.

Printing an Ad-hoc Report

From the Report Parameter Definition screen, select **File** then the **Open** option.

1. Highlight report format and click OK.
2. Print the report using **File/Print**.
3. Click OK.

configuration control

Configuration Control

Configuration Control allows you to view and adjust parameters inside the ACD switch that relate to operating functions such as traffic control and staffing.

Accessing Configuration Control

Depending on your privilege level and scope definition, you can perform the following functions. From the **Config** menu (on Main window) select:

1. **Positions** to change agent positions.
2. **Groups** to change ACD groups or network parameters (options on submenu).
3. **ACD DNs** to change ACD DNs.
4. **Networking** to change Network Targets and limitations.
5. **Change Order** to create or modify change orders.
6. **View/Transaction Log** to view configuration transactions.
7. **View/APR List** to view APR failures.
8. **View/Execution Queue** to view requests.
9. **View/**(table name) to view the desired database table.

alarms (SNMP)

Access to SNMP

The SNMP feature (when enabled by the sys admin) is accessed by selecting **Displays/Alarms**.

Alarm Definition

The window allows you to define or modify an alarm. To define a new alarm, select the **Options / Add** option on the Alarm Definition window. To modify an existing alarm, click on the Modify button.

SNMP Community Setup

To access the SNMP Community Setup window, select the **SNMP / Community Setup** option from the Alarm Definition window.

MIB Transfer

To access the MIB Transfer window, select the **SNMP / MIB Transfer** option from the Alarm Definition window.

NORTEL
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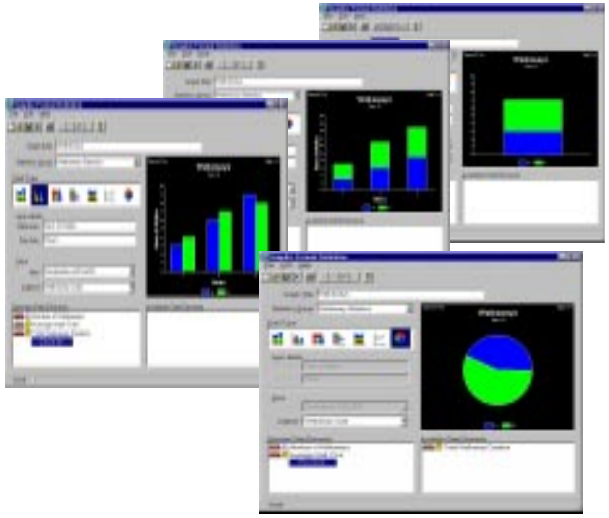
Call Center Management Information System

Release 4.1

Quick Start
with CC MIS

297-2671-175.04.02 Standard April 1998

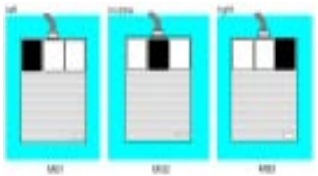


297-2671-175

Reference Card

Getting Started

The mouse can be used in place of the keyboard to select menu options and to highlight fields. When the mouse is moved the mouse cursor moves across the screen. This cursor indicates the position of the mouse on the screen.



To select a field using the mouse:

1. Move the mouse cursor to the field to be selected.
2. With the cursor position over the desired field, click MB1.
3. The cursor is now located within the selected field.

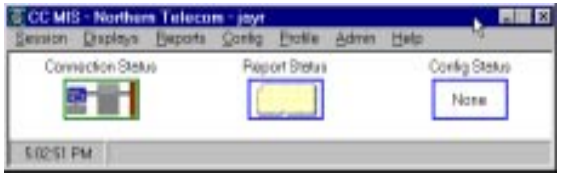
The mouse can be used to select items from pulldown menus. Click MB1 on the menu button (for example Reports) then click MB1 on the desired option.

login

Login to CC MIS

1. Double-click MB1 on the WCCMIS icon.
2. The CC MIS Main menu window appears.
3. Select **Sessions**, then the **Login** option.
4. The Login window appears.
5. Enter your supervisor ID (if not already displayed) and password (if required).
6. Identify your preferences.
7. Click on the OK button.

After successful login, the CC MIS Main window is displayed.



CC MIS Main Window

All of the major supervisory functions are accessed from this window: **Displays**, **Reports**, **Configuration**, **Profile**, and **System Administration**. The image above shows the CC MIS Main window with the connection, report, and config status displayed.

agent status

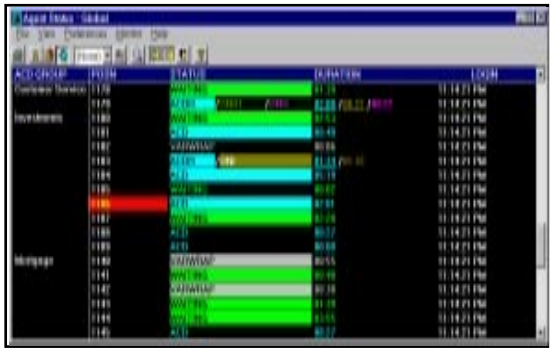
Agent Status Display

The Agent Status display allows you to change or control:

a.) The positions for which agent status is displayed by setting the view to supervisor, group, or global or monitoring another supervisor (if enabled in profile).
b.) information presented for each partition by setting your preferences.
c.) layout by selecting your preference.

Accessing the Agent Status Display

From the Main menu, select **Displays** then the **Agent Status** option.



Agent Status Display Screen

queue statistics

Queue Statistics Displays

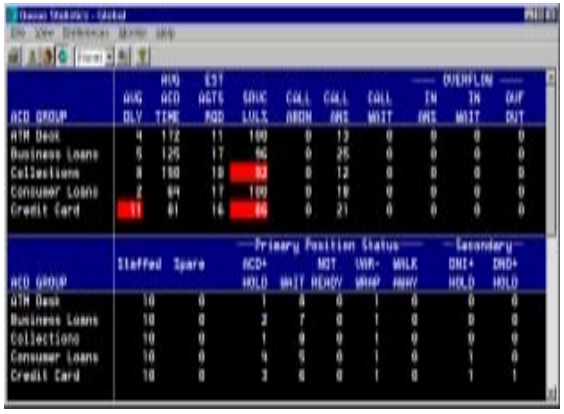
The Queue Statistics display provides information about the efficiency with which an ACD group is handling calls.

There are four standard Queue Statistics display format:

- Standard Tabular Queue
- Standard Graphic Queue
- Graphic Grade of Service
- ACD Group Summary

Accessing the Queue Statistics Displays

From the Main menu, select **Displays** then the **Queue Statistics** option.



Queue Statistics Display Screen

pc attached wallboards

Access to Wallboard Configuration

Wallboard configuration screens allow you to specify wallboard devices to be attached to a supervisor PC.

From the Main menu, select **Session** then the **Setup / Wallboards** option. A dialog is displayed. Complete the information in the dialog to connect the wallboard to your PC.

networks

In CC MIS Software Release 4.0, CC MIS systems can be networked. Networking allows supervisors on one CC MIS to view information of a supervisor on a different CC MIS or the entire network.

Supervisors running in a networked CC MIS environment will see partition code suffixes on ACD Group names in real-time displays and the Node field in Configuration Control screens. Insert dialogs will contain functions to allow the supervisor to select the node(s) then the groups under the selected node.

continued next page ...

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