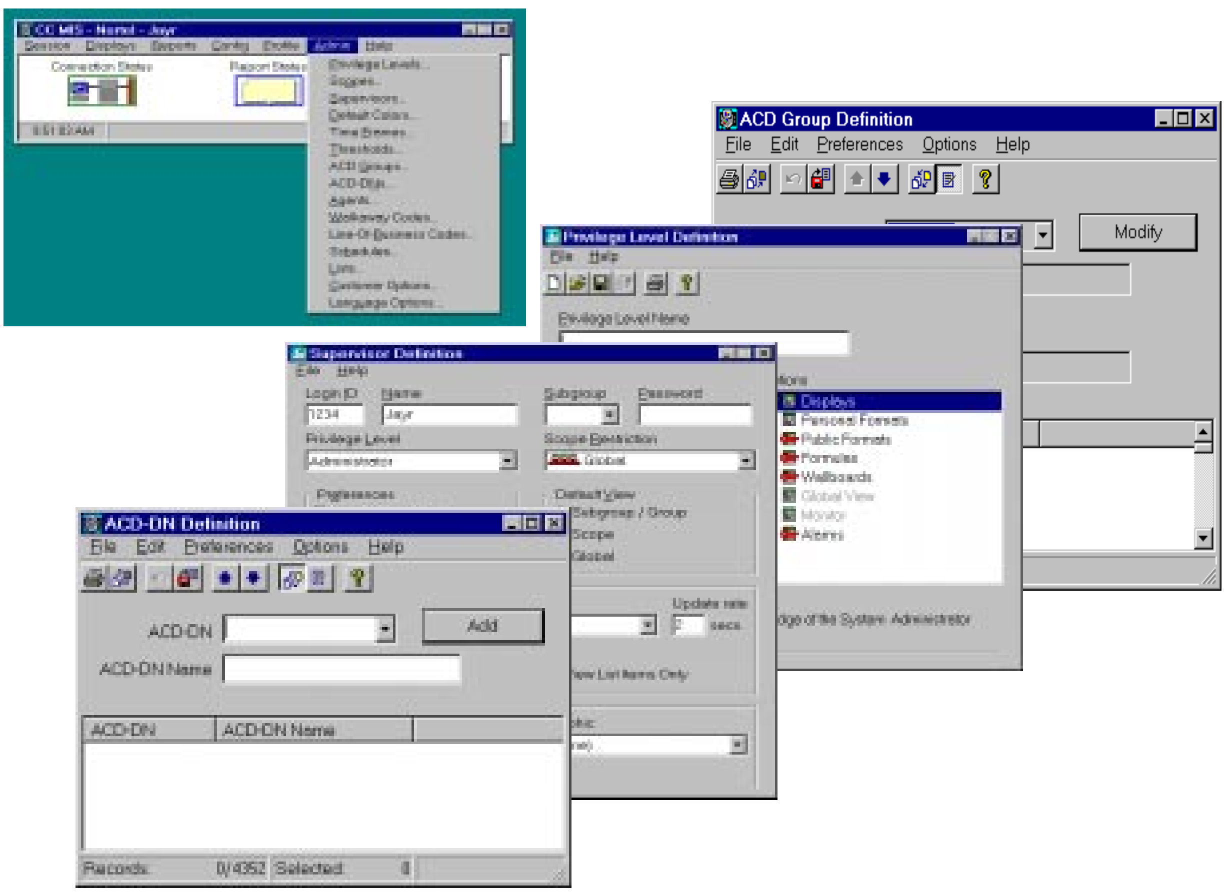
Call Center Management Information System

297-2671-345

CC MIS System Administration

Standard 297-2671-345.01.02

CC MIS Maintenance Release 3.2



Guide to System Admin functions for the Supervisor Interface

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CC MIS System Administrator's User Guide

Supervisor's Interface
CC MIS Maintenance Release 3.2
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Nov 1996

Standard version for Maintenance Release 3.2.

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First issue of this guide. Preliminary version for Maintenance Release 3.2 for use at VO Sites.

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About this Guide

This is the System Administrator’s User Guide for CC MIS (NTP 297-2671-345). This guide should be used in conjunction with other NTPs issued in support of CC MIS.

Scope

This guide is intended to be used by supervisors who are designated as system administrators and who have access to the Admin menu functions. It provides these users with the basic steps and information needed to gain access to all of the major functions available in the Admin menu.

This guide is divided into three parts:

Part One - Admin Menu Options
Part Two - Admin Functions
Part Three - Appendices

This guide does not cover the normal supervisor functions. Information concerning the use of these functions is presented in the *CC MIS Supervisor’s Guide*, NTP 297-2671-340.

This guide contains information needed by a supervisor using a Call Center Management Information System (CC MIS) linked to an MSL-100 (Meridian 1 Options 111-211) switch or a DMS-100 or DMS 500 switch supporting the 32 or 35 MIS ACD data stream and ACD-MIS Interface Specification, Version 6 or 9.

Note: The switch supporting CC MIS, either the MSL-100 or the DMS-100, is called a DMS-ACD throughout this book.

References

The following Northern Telecom documents contain additional information to supplement this document. For more information on ACD, refer to the following Northern Telecom Publications (NTP):

- ACD Product Guide (NTP 297-2041-010)
- ACD Server Product Guide (NTP 297-2041-011)
- ACD Planning and Engineering Guide (NTP 297-2041-101)
- ACD Planning and Engineering Guide - Canada (NTP 297-2041-104)
- ACD Administration Guide (NTP 297-2041-301)
- ACD Translations (NTP 297-2041-350)
- ACD Maintenance Guide (NTP 297-2041-500)
- ACD Trouble Locating and Clearing Procedures (NTP 297-2041-503)
- M5212 ACD Set General Description (NTP 297-2041-900)
- ACD End-User Load Management (NTP 297-2041-901)
- Network ACD General Description (up to BCS 34) (NTP 555-8101-100)

For more information on CC MIS, refer to the following NTPs:

Maintenance (Host) NTPs:

- Call Center MIS System Description (NTP 297-2671-150)
- Call Center MIS Release Notes (NTP 297-2671-211)
- Call Center MIS Maintenance and Administration Guide (NTP 297-2671-545)

Supervisor Interface NTPs:

- Call Center MIS Getting Started (Quick Start) Guide (NTP 297-2671-175)
- Call Center MIS System Administrator User's Guide (NTP 297-2671-345)
- Call Center MIS Supervisor's Guide (NTP 297-2671-340)

CC MIS Release 3.0 features

The following features are available in Release 3.0.

- Automatic Position Reassignment (APR) - (Optional)
- BCS 35 support
- Enhanced Agent and Group status - (Optional)
- Shift and 24 hour statistics
- Increased Report Definitions (up to 500)
- Windows based Configuration Control screens (Load Management)
- One Partition

Optional 3.0 features

The following features are optional purchases. This document or related CC MIS documents address these features. Verify with the distributor that your system is equipped with one or all of the features.

- Multiple Partitions
- Dual Data Links
- Language Options
- Link Redundancy
- Disk Mirroring
- Terminal Capacity

Maintenance Release 3.1 features

The following features and enhancements were added and made in Maintenance Release 3.1.

- Flexible DN Formatting
- Group Ordering
- Real-time Display Refresh
- Employee ID
- Increase in ACD group and ACD-DN fields
- Changes to statistics name and headings

Maintenance Release 3.2 features

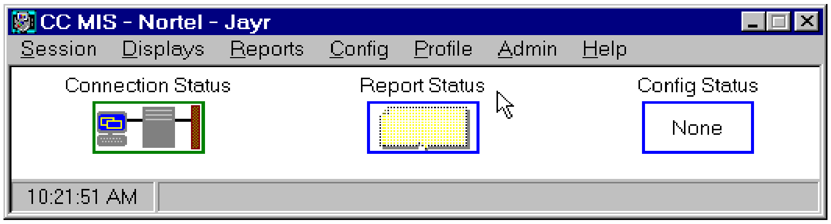
The following features and enhancements were added and made in Maintenance Release 3.2.

- Agent Forced Out Timers
- SNMP
- Modified (window) Admin screens
- Two New Standard Reports (Alarms and Schedules)
- Enhancement to Spectrum Data
- Enhancement in display of ACD Group Names in screens and reports

How to use this guide

This guide provides procedures to system administrators of the supervisor interface running under Windows. This guide describes the Admin function. The regular supervisor interface is described in NTP 297-2671-340, *CC MIS Supervisor's Guide*. Administrators new to the CC MIS system should also refer to the CC MIS Getting Started Guide, NTP 297-2671-175.

CC MIS Main window

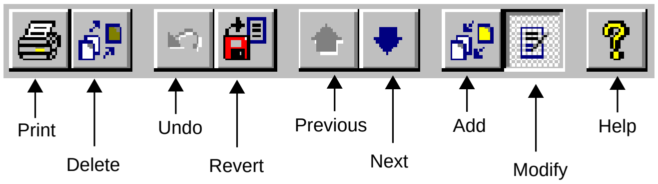


Screen captures used in this guide

The sample screens used in this guide where captured from the CC MIS product running in Windows 95. If you are using Windows 3.1, your screens will have a slightly different appearance. However, both versions of the screens function in the same manner.

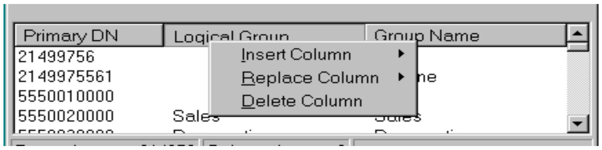
Tool Bar

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.



List area menus

Columns in the List area have drop down menus as shown below. The menu options allow you to display, modify, or remove columns.



Scroll bar in list area

If you are running in Windows 3.1, the scroll "thumb" does not appear to move all the way down the scroll bar in the list area on the following definition screens: ACD Group, ACD-DNs, LOB, Walkaway, Agent, and Alarm. Despite this indication, the scrolling of the list area functions correctly.

Part One

Admin Menu Options

Contents:

Section 1: Introduction

1

Introduction to Admin functions

The admin option is only available to supervisor's with administrator privilege levels.

The admin menu option allows access to the following functions:

- privilege definition
- scope definition
- supervisor definition
- time frames definition
- threshold definition
- ACD group definition
- ACD-DN definition
- agent definition
- walkaway code definition
- line of business code definition
- schedule definition
- list definition
- definition of system default printers, system administrator password, and customer name printed on reports
- language options

Tip

Use the online help function to obtain quick information on any of the Admin functions. To access help, select the **Help** option from the current Admin screen.

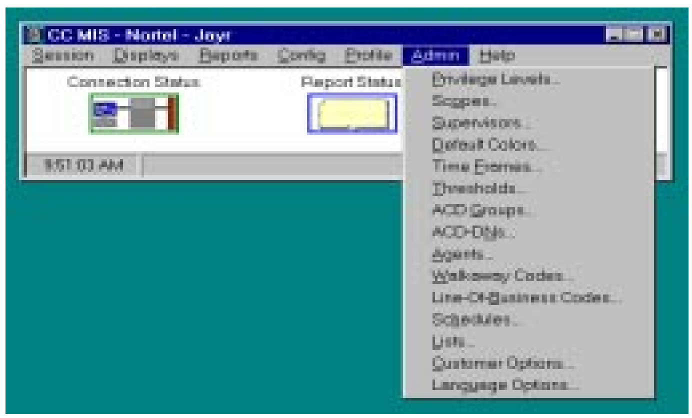
This guide provides information on using these functions and their corresponding system reports. In addition, this chapter provides the following information about functions reserved for system administrators:

- defining spectrums
- creating formulas for reports and displays
- creating custom public report formats
- scheduling reports and configuration changes
- creating custom public displays

Admin menu

The Admin menu contains the admin function which are accessible only to supervisor's with an administrator privilege level.

Figure 1.1 Admin menu



Accessing the administration functions

Administration functions are accessed through the Admin option of the Windows interface and the Parameter Administration option of the Text interface.

Step 1-1: Accessing the Admin menu

1. From the CC MIS Main window, select the Admin option.
2. The Admin menu is displayed.
3. Select the desired option.

Section 2: Privilege Levels

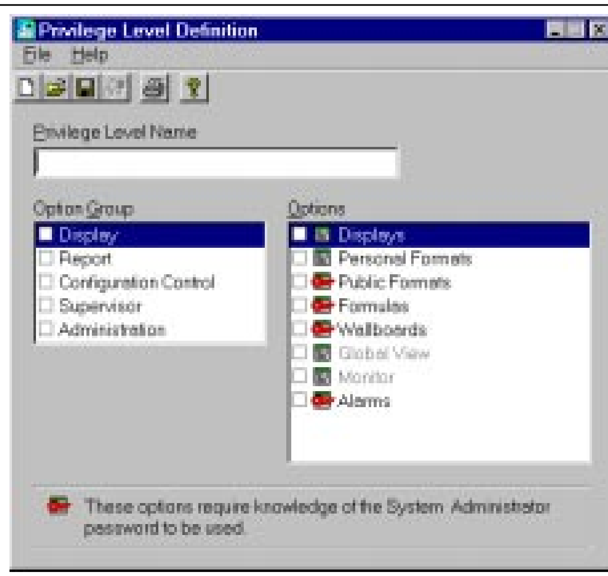
2

Introduction

CC MIS allows the capability to define classes of supervisors with assigned sets of privileges. These privileges define the screens that are accessible to the supervisor within each class. Up to 256 privilege levels can be defined.

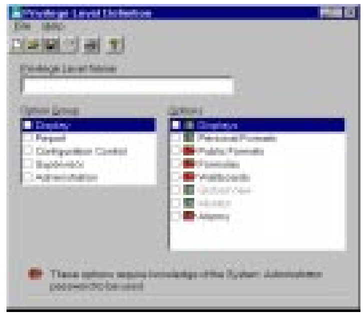
The Privilege Definition screen is shown in the figure below.

Figure 2.1 Privilege Level Definition screen

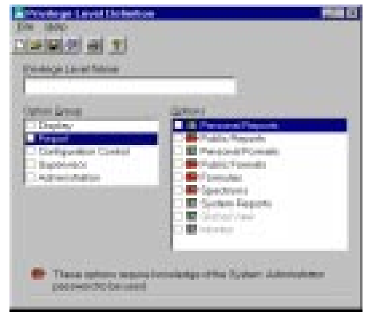


The options displayed depend on the Option Group that is selected. The option groups and options are shown in the figure below.

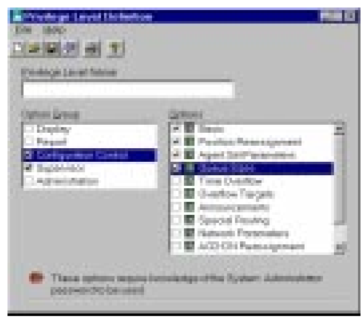
Figure 2.2 Option groups and options



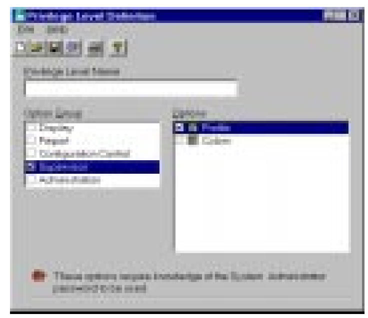
Display options



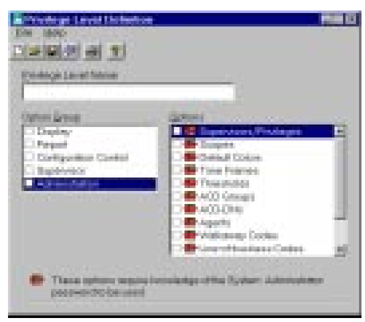
Report options



Configuration Control options



Supervisor options



Administration options

Privilege options requiring sys admin mode

On the Privilege Level Definition screens, options marked by the key emblem (* in text) require that you also know the system administrator password before these screens are accessed. (The system administrator password is defined in the Customer Options screen.)

Single user features for system administrators

The term "single user" refers to a feature that can have only one active user at a time. Supervisors that have system administrator enabled in their profile have access to single user features. The first administrator to enter a single-user feature has full use of the feature. Subsequent administrators who attempt access to the feature will be allowed read-only access to the feature. A message is displayed indicating the read-only access and identifying the administrator with full access to the feature.

The features that are considered as single-user features are:

- All Parameter Administration modes
- Configuration Control - Change Order Definition
- Report Definition - Public, Format, and Formula Definitions
- Spectrum Definition
- Display Definition - Public Screen, Format, and Formula Definitions
- Wallboard Definition

If the system administrator password is defined, you must enter system administration mode and supply the password.

To enter system administration (sys admin) mode, complete the steps below.

Step 2-1: Entering the sys admin mode

1. Select the Access command from the Admin menu.

   The system displays a prompt asking for the system administrator password.

   Note: If the Access command is not displayed, a system administrator password is not defined. You currently have access to all screens.

2. Enter the system administrator password.

   Access to all screens is granted.

Creating a privilege level definition

To create a privilege level definition, access the Privilege Level Definition screen. Use the steps below to access and update the screen.

Step 2-2: Accessing the privilege level definition

1. Login as the system administrator.
2. From the Admin menu, select the Privilege Levels option.

   The Privilege Level Definition screen displays.
3. Enter a name in the Privilege Level Name field. The name may be up to 20 characters in length and may contain any printable characters including blanks.
4. Select the desired control options.
5. From the File menu, select Save or Save As.

Note: CC MIS allows multiple files to be saved with the same name. Therefore, ensure you enter the desired name.

The table below provides a description of the fields on the Privilege Level Definition screen.

Table 2-1: Privilege definition field descriptions

Field	Description
Privilege Level Name	The unique name used to identify the level of control offered by the privilege level. The name may be up to 20 characters and may contain printable characters including blanks.
Display Options	
Displays	This option determines whether or not the supervisor will have access to the real-time displays (Agent Status Display and Queue Statistics Display).
Personal Formats	Allows the supervisor to create, modify, and delete personal display formats using the Quadrant Definition and Screen Definition modes.

Table 2-1: Privilege definition field descriptions

Field	Description
Public Formats	Allows the supervisor to create, modify, and delete public display formats using the Quadrant Definition and Screen Definition modes.
Formulas	Allows the supervisor to create, modify, and delete custom formulas for the real-time displays using the Display Formula Definition mode.
Wallboards	Allows the supervisor to create, modify, and delete wallboard display messages using the Wallboard Message Definition and Wallboard Display Definition modes. Note: Wallboard Definition is a software option. If this option is disabled, this field will not be displayed in the Privilege Level Definition screen.
Global View	Allows the supervisor to view all ACD groups and positions in the real-time display modes regardless of the scope restriction applied to the supervisor in the supervisor's profile. This option requires that the Display option be enabled.
Monitor	Allows the supervisor to monitor the real-time displays of other supervisors. This option requires that the Display option be enabled.
Alarms	Allows supervisors to create, modify and delete alarm definitions using the Alarm Definition mode. (This is the supervisor interface to the SNMP feature.) Note: Alarms Definition is a software option. If this option is disabled, this field will not be displayed in the Privilege Level Definition screen.
Report Options	
Personal Reports	Allows the supervisor to create, modify, and delete personal report definitions using the Report Parameter Definition mode.
Public Reports	Allows the supervisor to create, modify, and delete public report definitions using the Report Parameter Definition mode.

Table 2-1: Privilege definition field descriptions

Field	Description
Personal Formats	Allows the supervisor to create, modify, and delete personal report formats using the Tabular Format Definition and Graphic Format Definition modes.
Public Formats	Allows the supervisor to create, modify, and delete public report formats using the Tabular Format Definition and Graphic Format Definition modes.
Formulas	Allows the supervisor to create, modify, and delete customer formulas for reports using the Report Formula Definition mode.
Spectrums	Allows the supervisor to modify the spectrum definitions using the Spectrum Definition mode.
System Reports	Allows the supervisor to request system reports to be printed. These reports contain most of the information entered in the administration modes. A switch configuration report is also available.
Global View	Allows the supervisor to generate a report containing all available information regardless of the scope restriction applied to the supervisor in the supervisor's profile. This option requires that the Public Reports or Personal Reports option be enabled.
Monitor	Allows the supervisor to monitor the reports of other supervisors. This option requires that the Public Reports or Personal Reports option be enabled.
Configuration Control Options	
Basic	This gives the supervisor basic Configuration Control capabilities such as viewing the transaction log, routing and audio tables, and the execution queue. This option must be enabled before any other Configuration Control options are enabled. If this option is disabled, all other Configuration Control options will be automatically disabled.

Table 2-1: Privilege definition field descriptions

Field	Description
Position Reassignment	Access to the Position Reassignment screen is enabled or disabled by this option. This screen allows the supervisor to move positions between the supervisors and ACD groups.
Agent Set Parameters	Access to the Agent Set Parameters screen is enabled or disabled by this option. This screen allows the supervisor to change parameters that control features related to the agent's telephone set.
Queue Sizes	Access to the Queue Sizes screen is enabled or disabled by this option. This screen allows the supervisor to change parameters that control the queue sizes associated with ACD groups.
Time Overflow	Access to the Time Overflow screen is enabled or disabled by this option. This screen allows the supervisor to change parameters that control the timed overflow of calls between ACD groups.
Overflow Targets	Access to the Overflow Targets screen is enabled or disabled by this option. This screen allows the supervisor to change the queue-count overflow targets for ACD groups.
Announcements	Access to the Recorded Announcements screen is enabled or disabled by this option. This screen allows the supervisor to change parameters associated with the playing of recorded announcements for ACD groups.
Special Routing	Access to the Special Routing screen is enabled or disabled by this option. This screen allows the supervisor to change the routing of calls under special circumstances such as night service and controlled interflow.
Network Parameters	Access to the Network Parameters screen is enabled or disabled by this option. This screen allows the supervisor to change the ACD group parameters that control the networking of calls between ACD groups.

Table 2-1: Privilege definition field descriptions

Field	Description
ACD-DN Reassignment	Access to the ACD-DN Reassignment screen is enabled or disabled by this option. This screen allows the supervisor to change the assignment of Supplementary ACD-DNs to ACD groups as well as the priority and name associated with each ACD-DN.
Network Targets	Access to the Network Targets screen is enabled or disabled by this option. This screen allows the supervisor to change the routing preferences for specific source and destination ACD group pairs.
Change Orders	Allows the supervisor to create, modify, and delete change order definitions using the Change Order Definition mode.
Supervisor Options	
Profile	This option allows supervisors to view and change their own profile. This does not include the ability to change their privilege level or scope.
Colors	Allows supervisors to modify their personal color scheme. If this option is disabled, the supervisor will be restricted to using the system default color scheme. If the Default Colors administration option is enabled, this option will always be enabled.
Administration Options	
Supervisor/ Privileges	Allows the supervisor to create, modify, and delete supervisor and privilege level definitions using Supervisor Definition and Privilege Level Definition modes.
Scopes	Allows the supervisor to create, modify, and delete scope definitions using Scope Definition mode.
Default Colors	Allows the supervisor to set the system default color scheme.
Time Frames	Allows the supervisor to modify the time frame definition using Time Frames Definition mode.
Thresholds	Allows the supervisor to create, modify, and delete threshold definitions using the Threshold Definition mode.

Table 2-1: Privilege definition field descriptions

Field	Description
ACD Groups	Allows the supervisor to create, modify, and delete ACD group definitions using the ACD Group Definition mode.
ACD-DNs	Allows the supervisor to create, modify, and delete ACD-DN definitions using the ACD-DN Definition mode.
Agents	Allows the supervisor to create, modify, and delete agent definitions using Agent Definition mode.
Walkaway Codes	Allows the supervisor to create, modify, and delete walkaway code definitions using the Walkaway Code Definition mode.
Line-of-Business Codes	Allows the supervisor to create, modify and delete Line-of-Business (LOB) code definitions.
Schedules	Allows the supervisor to create, modify, and delete schedule definitions using Schedule Definition mode.
Lists	Allows the supervisor to create, modify, and delete list definitions using List Definition mode.
Customer Options	Allows the supervisor to change the customer name, default printers and system administrator password using the Customer Options mode. Also allows access to Language Options mode on multi-lingual systems.

Section 3: Scopes

3

Using the Scopes option

As a CC MIS system administrator, you can create scope definitions that are used to limit each individual supervisor's view or realm of control within a partition.

A scope definition is basically a list of ACD groups or subgroups that together specify the ACD groups and positions that a supervisor (or group of supervisors) is allowed to view, report on, and modify.

You establish and maintain a scope definition through the Scope Definition screen as shown in the figure below

Figure 3.1 Scope Definition screen

Using ACD Groups listing in scopes

The ACD Groups list on the Scope Definition screen (or the list of ACD Groups derived from the Subgroups list) is used for the following:

- limits the display of ACD groups in the Queue Statistics Display mode
- limits the ACD groups included in historical reports requested by this supervisor
- limits the ACD groups that may be changed in any of the Configuration Control screens that operate on ACD groups
- limits the ACD-DNs that may be changed in the ACD-DN Assignments and Priorities mode of Configuration Control to those ACD-DNs that belong to the specified ACD groups. In order to reassign an ACD-DN between groups, the scope must contain both the old and new ACD groups.
- limits the entries in the Network Targets mode of Configuration Control that can be changed by the supervisor to those for which the source ACD group exists in the scope

Using Subgroups listing in Scopes

The Subgroups list portion of the Scope Definition screen (or the list of Subgroups derived from the ACD Groups list) is used for the following:

- limits the display of positions in the Agent Status Display mode to those positions belonging to the specified subgroups
- limits the subgroups included in historical reports requested by this supervisor. This applies to event log reports and to reports that use the Agent Statistics and LOB Statistics groups.
- limits the positions that may be changed in the Position Assignments mode of the Configuration Control to those positions that belong to the specified subgroups.

In order to reassign a position between subgroups, the scope must contain both the old and new subgroups.

The table below provides descriptions of the Scope Definition screen fields.

Table 3-1: Scope definition screen field descriptions

Field	Description
Scope Name	The unique name used to describe the portion of the customer's ACD operations that are encompassed. The name may be up to 20 characters and may contain printable characters including blanks. Note: CC MIS allows multiple definitions to be saved with the same name.
ACD Groups	This field specifies a list of up to 256 ACD groups to be included in the scope. If left empty, the ACD groups that make up the scope are determined from the listed subgroups. ACD groups may be specified by number or by name, but will be displayed based on the ACD Group Names option in the supervisor's profile. Note: While groups may be specified by number or name, they are displayed based on the ACD Group Names option in your supervisor profile.
Subgroups	This field specifies a list of up to 256 subgroups to be included in the scope. If left empty, the subgroups are determined from the listed ACD groups. Subgroups are identified by the supervisor position ID assigned to the subgroup. The valid range for supervisor position IDs is from 1 to 9999 inclusive. Note: If both ACD groups and subgroups are listed, they must belong to the ACD groups specified in the ACD Groups field. Otherwise, they will be silently discarded by the system when using CC MIS functions. ACD groups that do not have at least one valid subgroup will also be discarded.

Note:

If a scope is defined that contains groups and subgroups, then the subgroups should be listed for all groups listed. Otherwise, you should not select any subgroups at all. For example, if you define a scope that consists of the following:

ACDGRPS	SUBGROUP
ACDGRP1	1111
ACDGRP2	

This will cause only ACDGRP1 to appear in screens that are based on Agent or Position data, but both ACDGRP1 and ACDGRP2 will appear on screens or reports that are based on ACDGRPs. This can be avoided by either listing all subgroups that are associated with each ACDGRP listed, or omit all subgroups (which will automatically include all subgroups).

Section 4: Supervisors

4

Establishing supervisors in CC MIS

System administrators create a supervisor profile for each supervisor. The system administrator creates and accesses supervisor profiles through

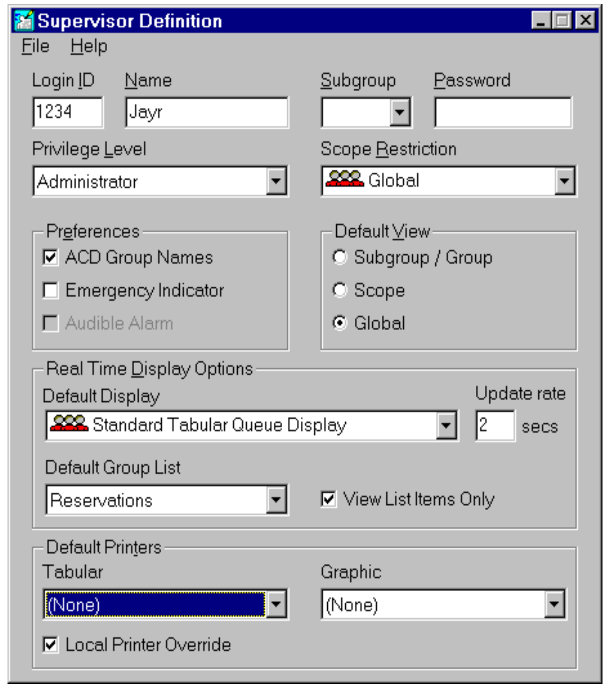
- Admin/Supervisors in the Windows interface
- Parameter Administration/Supervisor Definition in the Text interface

The system administrator grants supervisors access to CC MIS features by defining a profile for each supervisor. The profile controls the supervisor's access to features.

A supervisor can be granted minimal access to features, total access to features, including system administration, or some degree in between. Access is controlled by privilege and scope fields. The access granted to a supervisor determines the options available from menus, command pop-ups, and softkeys.

You establish and maintain a supervisor's profile through the Supervisor Definition screen as shown in the figure below.

Figure 4.1 Supervisor Definition screen



Note: In the Windows Interface, the Default Group List field has been added to identify a default group list for the real time displays.

To become familiar with the effect of the supervisor profile on access to CC MIS features, the system administrator can experiment with profiles while in a training mode partition. The system administrator defines supervisor profiles during the pre-cutover phase of installation when the system is first installed. After installation, profiles can be created, changed, and deleted while the partition is running in the product mode.

Login IDs and Subgroup IDs

In the profile, the system administrator assigns a Login ID to the supervisor. This ID identifies the supervisor to CC MIS and is used by the supervisor to log in to CC MIS.

The system administrator may associate the Login ID with a Subgroup ID. This ID associates the supervisor with a subgroup defined at the ACD switch. The Subgroup ID, if specified, identifies the default subgroup or ACD group for the real-time displays. It also plays a part in determining the supervisor's scope since it is added to the scope if it is not already present in the scope definition.

Creating a supervisor profile

To create a supervisor profile, access the Supervisor Definition Screen. Use the steps below to access and update the screen.

Note:

For information on the options of the supervisor profile, see Table 4-1.

Step 4-1: Creating a supervisor profile

1. From the main window, select Admin / Supervisors.

2 Enter information for default display, privileges, scope restrictions, preferences, and default printers.

3. Save the profile:

   a. Select File / Save.

   b. Read the information box, and click ok.

Note: CC MIS allows multiple profiles to be saved using the same name.

Giving supervisors access to sys admin functions

The system administrator can grant supervisors the ability to perform system administration functions by enabling the appropriate options in the supervisor's privilege level definition. With the system administrator options selected and knowledge of the system administrator password (if implemented), a supervisor can:

- create supervisor profiles
- delete supervisor profiles defined in CC MIS
- define public reports
- define public tabular and graphic formats
- define formulas to manipulate statistics
- change spectrum definitions
- customize colors
- define schedules
- define saved change orders

Using a password to protect access to sys admin functions

To provide security to system administrator functions, only a system administrator with the Customer Options privilege level can assign a system administrator password. When assigned, the password must be entered whenever anyone accesses system administration mode.

When password protection is used for system administrator functions, system administrators can exit from system administration mode without logging out of CC MIS. When a password is used, the Admin functions are accessed by selecting **Admin/Access** and entering the password.

Assigning a password to sys admin functions

To assign a password to system administrator functions, access Parameter Administration/Customer Options (Text) or Admin/Customer Options (Windows). At password, enter the password. The system informs you of data entry errors.

Updating the Supervisor Definition screen

You establish and maintain a supervisor's profile through the Supervisor Definition screen as shown in the figure below. Perform the steps in the procedure below to access and update the Supervisor Definition screen.

Step 4-2: Updating the supervisor definition screen

1. From the main window, select **Admin / Supervisors**.

   The system displays the Supervisor Definition screen.

2. Identify the supervisor to be updated. Use buttons, menus, and check boxes to select and update fields.

   Note: If the field is grayed, you cannot select or update that field.

3. Save your changes:
   a. Select File / Save.
   b. Read the information box, and click ok.
   c. Select File / Exit.

Options for supervisor profiles

The table below identifies the options maintained in the supervisor profile. It also identifies any dependencies to enable the option and the ability provided by the option.

Table 4-1: Supervisor profile options

Option	Required ?	Option dependent on	Ability provided by option
ACD Position ID	no	None	Determines which ACD groups and positions are shown in supervisor view on the real-time displays
Color Customization	no	None	Determines if a supervisor has the option of customizing their screen colors. This option gives system administrators the ability to change default colors for all supervisors.
Configuration Control	no	None	Determines if the supervisor can change or view the configuration of the DMS-ACD.
Login ID	yes	None	Allows the supervisor to login.
Name	yes	None	Identifies the person associated with the Login ID.
Subgroup	no	None	Identifies the subgroup sent to CC MIS by the switch at initialization time. This number is used to associate agents with the login ID.
Password	no	None	Requires password for supervisor to login.

Table 4-1: Supervisor profile options

Option	Required ?	Option dependent on	Ability provided by option
Privilege Level	yes	None	Identifies the privilege level assigned to the supervisor by the system administrator. Only the system administrator can change the privilege level.
Scope Restriction	yes	None	Identifies the scope restriction assigned to the supervisor by the system administrator. Only the system administrator can change the scope restriction.
Default View: Subgroup/ Group Scope Global	yes	Privilege Level	Determines the view accessed by the supervisor in real-time displays at login.
Preferences: ACD Group Names	 no	 None	 Determines if ACD group names are displayed. If checked and ACD Group name is defined, the group name is displayed on reports. If checked but not defined, the DN number is displayed. If not checked, the DN number is displayed.

Table 4-1: Supervisor profile options

Option	Required ?	Option dependent on	Ability provided by option
Preferences: Emergency Indicator	no	None	Determines if a visible indicator alerts the supervisor of an emergency condition for one of the agents who is monitored by the supervisor's Group Member List or ACD Position ID.
Preferences: Audible Alarm	no	Emergency Indicator	Determines if an audible alarm alerts the supervisor of an emergency condition for one of the agents the supervisor supports.
Default Display	yes	None	Sets the default display format for the Queue Statistics Display at login.
Update Rate	yes	None	Determines the rate at which statistics are updated in real-time displays. If this is set too high for system conditions, the software automatically adjusts to a lower rate.
Default Group List	no	None	Determines the default ACD Group list used in the real-time display modes.
View List Items Only	no	Default Group List	Limits the ACD groups displayed to only those ACD groups which are in the selected list.

Table 4-1: Supervisor profile options

Option	Required ?	Option dependent on	Ability provided by option
Default Printers: Tabular	no	None	Determines the default printer for tabular reports for this supervisor.
Default Printers: Graphic	no		Determines the default printer for graphic reports for this supervisor.
Local Printer Override	no	None	Allows supervisors to print at a printer attached to the terminal where they issue a report rather than at the default printer defined in the profile.
Default Language	yes	None	Determines the language in which the reports are printed. This option is for multilingual systems only.

Section 5: Time Frames

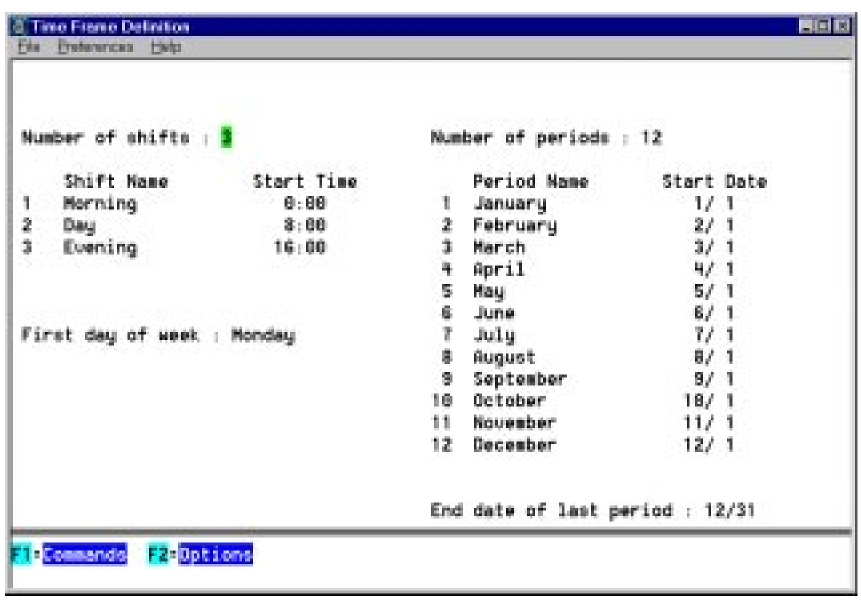
5

Using the Time Frames option

The historical reports produced by CC MIS summarize data over various time frames you specify. Reports may be from interval, shift daily, weekly, monthly, or period data.

You define the exact parameters for shift, daily, and period data summaries through the Time Frames Definition screen.

Figure 5.1 Time Frames Definition screen



CAUTION
Avoid generating invalid reports

Shift reports consist of data collected and stored over the time period specified for interval data. Period reports consist of data collected and stored over the time period specified for daily data.

Table 5-1: Time frame field descriptions

Field	Description
Number of Shifts	Define up to 5 shifts. Specify a name and start time in time order for each shift. Shift reports use interval data (stored in the database every 30 minutes). Note: Shifts cannot overlap and cannot span midnight.
First Day of the Week	Define the day of the week on which new weekly summary records are created. Note: If the day of the week is changed, previously stored data is lost.
Number of Periods	Define up to 13 periods. Specify a period name and start time in chronological order. Period reports use daily data (stored in the database every 24 hours).
End Date of Last Period	Define the last day of the period to gather and summarize information for the entire period cycle.

Section 6: Thresholds

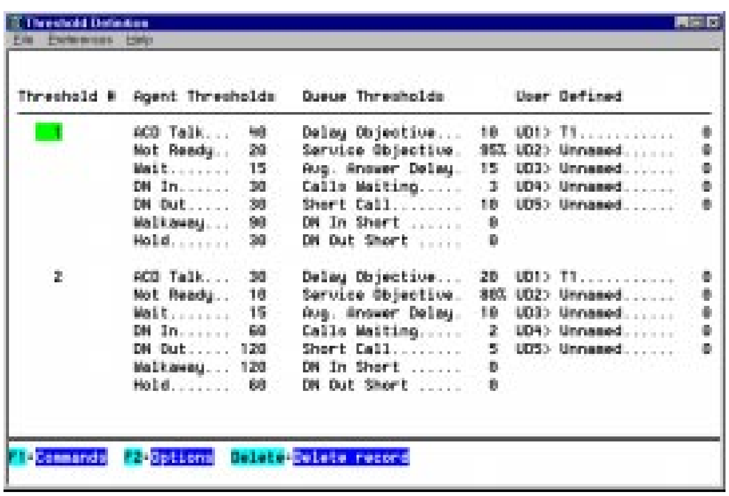
6

Using the Thresholds option

You can instruct CC MIS to highlight a real-time value in the display when it reaches a threshold you specify. (The delay objective and short call thresholds also affect certain display and report formula results.) Define a set of these values using the Threshold Definition screen.

Note: These thresholds are not the same as DMS-ACD thresholds.

Figure 6.1 Threshold Definition screen - Windows



Modifying user-defined thresholds

To modify the user-defined thresholds, access the Threshold Definition screen from Parameter Administration (Text) or Admin/Thresholds (Windows).

Select the Define threshold names option from the Commands pop-up menu. The system displays the Threshold name definition pop-up. Press the Commands key to exit the pop-up.

Table 6-1: Threshold definition screen fields

Field	Description
Threshold #	Identifies set of threshold values.
Agent Thresholds	
ACD Talk	Defines the maximum amount of time an agent should spend on an ACD call.
Not Ready	Defines the maximum amount of time an agent should spend in the Not Ready state.
Wait	Defines the maximum amount of time an agent should spend waiting for a call.
DN In	Defines the maximum amount of time an agent should spend on an incoming DN call.
DN Out	Defines the maximum amount of time an agent should spend on an outgoing DN call.
Walkaway	Defines the maximum amount of time an agent should spend in Walkaway status.
Hold	Defines the maximum amount of time an agent should keep a caller on hold.

Table 6-1: Threshold definition screen fields

Field	Description
Queue Thresholds	
Delay Objective	Defines the goal for the amount of time a caller should have to wait for a call to be answered. This threshold is used to compute the service level percentage.
Service Objective	Defines the desired service level.
Average Answer Delay	Defines the average time a caller should have to wait for the call to be answered.
Calls Waiting	Defines the maximum number of calls that should be waiting in queue.
Short Call	Identifies the minimum duration of a call. Calls shorter than this are considered "short calls."
DN IN Short Call	Identifies the minimum duration of an incoming DN call. Calls shorter than this are considered short incoming DN calls.
DN OUT Short Call	Identifies the minimum duration of a outgoing DN call. Calls shorter than this are considered short outgoing DN calls.
User Defined	Define names and values for up to five thresholds.

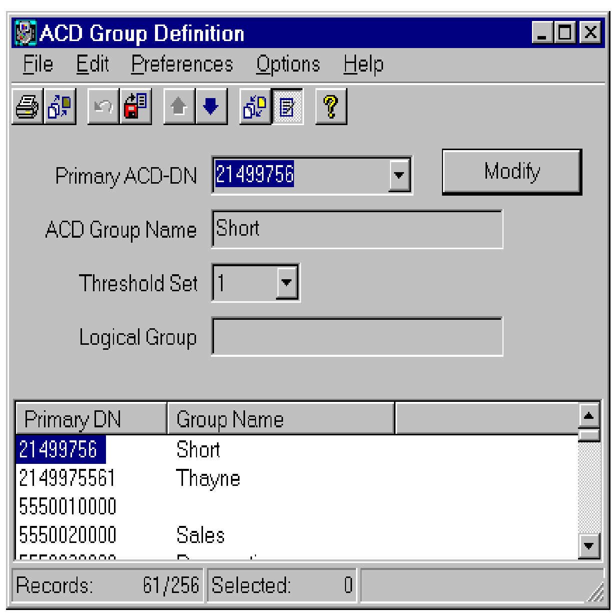
Section 7: ACD Groups

7

Using the ACD Groups option

You associate ACD groups with names and thresholds through the ACD Group Definition screen, shown in the figure below.

Figure 7.1 ACD Group Definition screen



CAUTION

Caution should be taken when defining initial ACD Group Definitions.

CC MIS was designed to allow administrators at a new site to be able to datafill a CC MIS as much as possible before cutting over to the product mode. However, there is *NO VALIDATION* of the ACD Group Definition entries at any time.

This allows the CC MIS system to be configured before it is activated. This capability can present some serious pitfalls. This functionality combined with the ability to use the same name for more than one ACD Group Definition, can result in very strange behaviors if the datafill is not entered properly.

If you datafill ACD Group Names for DNs that do not exist, or datafill supplementary DNs instead of (or in addition to) primary ones, then the translating to and from ACD Group Names and ACD Group (primary) DNs returns invalid DNs.

The ACD Group Definition screen fields and descriptions are listed in the table below.

Table 7-1: Threshold definition screen fields

Field	Description
Primary ACD-DN	Identifies the directory number of the ACD group being defined. A valid directory number may contain up to ten digits. All digits should be entered including leading zeros, if applicable. The DN will be formatted automatically according to the DN format string specified in the Customer Options screen.
ACD Group Name	Identifies the name of the ACD group being defined. Define a name only if you want it to appear on real-time displays and on reports. Note: CC MIS does not recognize whether letters used in an ACD group name are upper- or lowercase while searching for a destination ACD group. Therefore, to differentiate between two similar ACD group names, specify an extra character or number in one of the names (for example, Credit - Credit1).
Threshold Number	Identifies the set of thresholds (defined in Threshold Definition) applied to the group.
Logical Group Name	Identifies the logical group with which this ACD group is associated.

Use the steps below to add a new ACD Group Definition.

Tip

For additional information on adding or changing an ACD Group definition, select the **Help/Window** option.

Step 7-1: Adding a new ACD Group Definition

1. From the Main window select **Admin / ACD Groups**
2. Enter the Add mode (by clicking on the Add button) then enter the Primary ACD-DN in the Primary ACD-DN field.
3. Complete the other data fields on the screen.
4. When complete, click Add or press the ENTER key to add the new ACD group.

Use the steps below to modify an existing ACD Group Definition.

Step 7-2: Modifying an ACD Group Definition

1. From the Main window select **Admin / ACD Groups**
2. Select the ACD-DN of the group you want to modify in the list area
3. Change information in the desired data fields on the screen.
4. When complete, click on the Modify button or press the ENTER key to send the changes to the database.

Use the steps below to modify an existing ACD Group Definition.

Step 7-3: Deleting an ACD Group Definition

1. From the Main window select **Admin / ACD Groups**
2. Select an ACD-DN in the definitions list area.
   Note: You can delete multiple ACD Groups by selecting all groups to be deleted.
3. Select **File / Delete** to delete the selected ACD Groups.

Defining logical groups

In CC MIS you have the capability of associating ACD Group names (Logical Groups). After the logical group is defined, you can view the group using the reporting function.

This is accomplished using the ACD Group Definition and Report Parameter Definition screens.

Use the steps below to add a logical group to an ACD Group Definition.

Short Cut ...

To modify all of the ACD Groups that will make up the Logical Group, select the ACD Groups in the list, then enter the logical group name.

Click on the Modify button and all of the selected groups will be modified.

Step 7-4: Adding an ACD Group Definition to a logical group

1. From the Main window select **Admin / ACD Groups**
2. Select ACD-DN from list, Then click on Modify button.
3. Enter the name for the logical group in the Logical Group Name field.
4. Select File/Exit.

Use the steps below to access the define a report to view logical groups.

Step 7-5: Defining a report to view logical groups

1. From the Main window, select **Reports / Parameters**
2. Fill in parameters fields, ensuring the you click on the Logical Groups box or specify logical groups in the group by field to select and enter the name of the logical group in the ACD-GRP field under the Data Selections section of the screen.
3. Select **File / Save** to save.
4. Select **File / Print** to print. click on the Report icon to view the report with the specified logical groups.

Section 8: ACD-DN

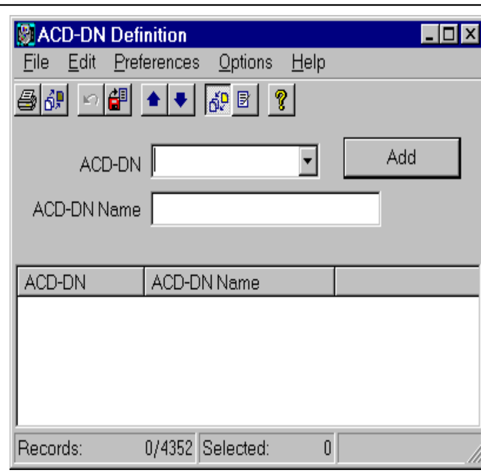
8

Using the ACD-DN option

The ACD-DN option allows you to enter the ACD-DNs defined on the CC MIS system and a corresponding name to be associated with that ACD-DN in reports. There may be up to 4352 ACD-DNs defined through this screen (17 DNs per ACD Group x 256 possible ACD Groups).

The ACD-DN screen will be accessible by a supervisor if the supervisor has the ACD-DNs field enabled in their privilege level definition. The ACD-DN Definition screen is the similar for both the Windows and the Text based user interface.

Figure 8.1 ACD-DN Definition screen



The table below lists and describes fields on the screen.

Table 8-1: ACD-DN definition screen fields

Field	Description
ACD-DN	The ACD directory number entered may contain up to 10 digits and will be formatted according to the DN format string in Customer Options. The ACD-DN number is used to classify the ACD group.
ACD-DN Name	The unique name that identifies the ACD-DN. The ACD-DN name may be up to 16 characters in length.

Creating, modifying, and deleting ACD-DNs

You create, modify, or delete a ACD-DNs from the ACD-DN Definition screen using the following steps.

Step 8-1: Creating an ACD-DN definition

1. Select the Options/Add option (if you are not already in the Add mode) on the File menu or click on the Add button on the tool bar.
2. In the ACD-DN field, enter the ACD directory number (up to 10 digits). Enter the unique name in the ACD-DN name field.
3. Click on the Add button on the tool bar or just press ENTER to send the new definition to the database.

Step 8-2: Modifying an ACD-DN definition

1. To select, click on the number of the ACD-DN to be modified in the definition list.

2. Change the information in the fields you wish to modify.

3. Click on the Modify button on the tool bar or just press ENTER to send the changes to the database.

Note: Use the **Edit/Revert** option to cancel the changes *before* you click on the Modify button.

Step 8-3: Deleting an ACD-DN definition

1. Click on the number of the ACD-DN to be deleted in the definition list to select.

   Note: You can select multiple definitions to be deleted.

2. Click the Delete button on the tool bar or select the **File/Delete** option on the File menu.

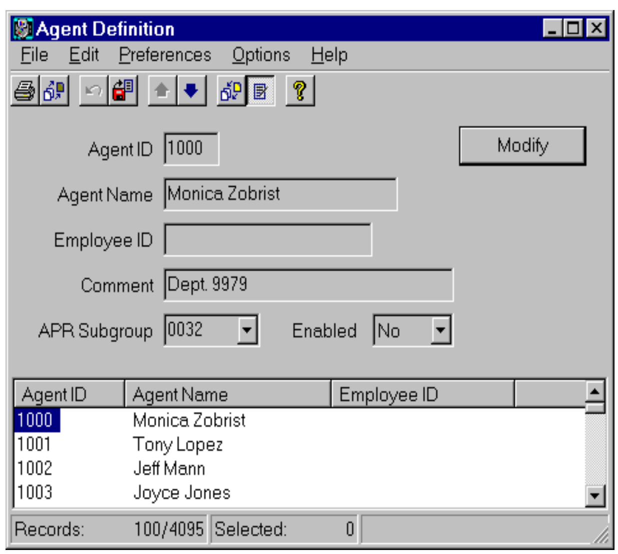
Section 9: Agents

9

Using the Agents option

You associate an agent name with an agent ID using the Agent Definition screen, as shown in the figure below. Up to 4096 agents can be defined, ranging from 1-9999.

Figure 9.1 Agent Definition screen (APR Enabled)



Note:

The APR fields are displayed only if the APR feature is enabled.

Table 9-1 lists and describes the fields in the screen

Table 9-1: Agent definition screen descriptions

Field	Description
Agent ID	Identifies the agent login ID number.
Agent Name	Use up to 16 characters to identify the agent's name. Note 1: In Text mode, only the first 15 characters are used in the real-time Agent Status display screen. The login ID can be included as part of the name. If a name has not been defined for a login ID, "****nnn" will be displayed, (the nnn is the login ID.) Note 2: If the system is operational and the agent's name is changed, the updated name is not used in the agent status screen until the agent logs out and back in at the ACD set.
Employee ID	Use up to 14 characters to identify an agent's employee ID number. This is an optional field and the employee number can be used as an alternate (instead of agent ID or name) to identify the agent in custom report formats.
Comment	This field helps the supervisor identify the agent. It is not used by the software for any purpose.
APR Subgroup	Specifies a subgroup ID with which the agent should be associated. If the position an agent logs into is not associated with their APR subgroup, the position is automatically reassigned to the APR subgroup. (This field is displayed only if the APR feature is enabled.)
APR On	This field enables or disables the APR feature for this agent.

Creating, modifying, and deleting an Agent

You create, modify, or delete an agent name with an agent ID from the Agent Definition screen using the following steps.

Step 9-1: Creating a new agent definition

1. Select the Options/Add option (if you are not already in the Add mode) on the File menu or click on the Add button on the tool bar.
2. In the Agent ID field, enter an unused number from 1-9999. Enter the desired information in the remaining screen fields.
3. Click on the Add button on the tool bar or just press <ENTER> to send the new definition to the database.

Step 9-2: Modifying an agent definition

1. Click on the ID number of the agent to be modified in the agent definition list to select.
2. Change the information in the fields you wish to modify.
3. Click on the Modify button on the tool bar or just press <ENTER> to send the changes to the database.

Note: Use the Edit/Revert option to cancel the changes *before* you click on the Modify button.

Step 9-3: Deleting an agent definition

1. Click on the ID number of the agent to be deleted in the agent definition list to select.

   Note: You can select multiple definitions to be deleted.
2. Click the Delete button on the tool bar or select the **File/Delete** option on the File menu.

Section 10: Walkaway codes

10

Using the Walkaway Codes option

You define walkaway codes that an agent enters when they need to leave their position, using the Walkaway Code Definition screen.

Figure 10.1 Walkaway Code Definition screen

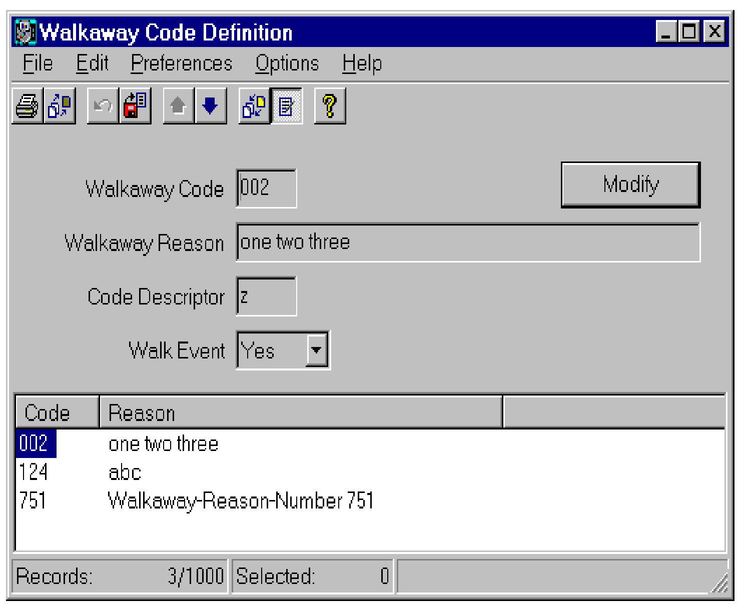


Table 10-1: Walkaway code definition field descriptions

Field	Description
Walkaway Code	Identifies the number of the walkaway code. Up to 1000 codes are supported.
Walkaway Reason	Identifies the reason associated with the walkaway code. Use up to 30 characters for each reason.
Code Descriptor	Identifies the agent's position as being in a walkaway state. This code appears on the Agent Status display.
Walkaway Event	Determines if the agent walkaway status is stored in the database. No indicates that the Walkaway event is treated as a default walkaway event and information is stored in the database as walkaway zero. Note: Changes to the Walkaway Event field will not take effect immediately. For example, changing a yes event to no or deleting a walkaway code entirely, will not stop the recording of this event until the next interval.

Creating, modifying, and deleting a walk code

You create, modify, or delete a walkcode from the Walkaway Code Definition screen using the following steps.

Step 10-1: Creating a walk code definition

1. Select the Options/Add option (if you are not already in the Add mode) on the File menu or click on the Add button on the tool bar.

2. In the Walk code field, enter an unused number from 0-999. Enter the desired information in the remaining screen fields.

3. Click on the Add button on the tool bar or just press <ENTER> to send the new code definition to the database.

Step 10-2: Modifying a walk code definition

1. Click on the ID number of the code to be modified in the definition list to select.

2. Change the information in the fields you wish to modify.

3. Click on the Modify button on the tool bar or just press <ENTER> to send the changes to the database.

Note: Use the Edit/Revert option to cancel the changes _before_ you click on the Modify button.

Step 10-3: Deleting a walk code definition

1. Click on the ID number of the code to be deleted in the definition list to select.

2. Click the Delete button on the tool bar or select the File/Delete option on the File menu.

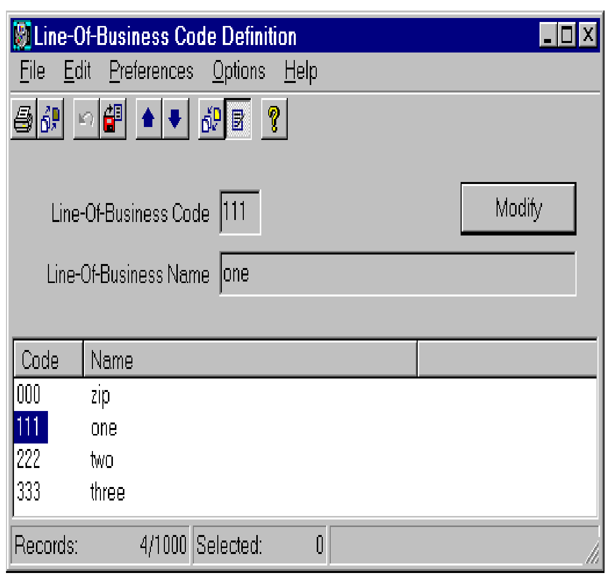
Section 11: LOB codes

11

Using the Line-of-Business Code option

You define codes for specific activities using the Line-of-Business (LOB) Code Definition screen

Figure 11.1 LOB Definition screen



The table below lists the Line-Of-Business (LOB) Code Definition screen fields and provides a description of each field.

Table 11-1: LOB Code definition screen fields

Field	Description
Line of Business Code	Identifies an LOB code number. Up to 1000 codes are supported.
Line of Business Code Name	Use up to 30 characters to describe an activity associated with the LOB code.

Creating, modifying, and deleting an LOB code

You create, modify, or delete a LOB code from the LOB Definition screen using the following steps.

Step 11-1: Creating an LOB code definition

1. Select the Options/Add option (if you are not already in the Add mode) on the File menu or click on the Add button on the tool bar.
2. In the LOB code field, enter an unused number from 0-999. Enter the desired information in the remaining screen fields.
3. Click on the Add button on the tool bar or just press <ENTER> to send the new code definition to the database.

Step 11-2: Modifying an LOB code definition

1. Click on the ID number of the code to be modified in the definition list to select.
2. Change the information in the fields you wish to modify.
3. Click on the Modify button on the tool bar or just press <ENTER> to send the changes to the database.

Note: Use the **Edit/Revert** option to cancel the changes *before* you click on the Modify button.

Step 11-3: Deleting an LOB code definition

1. Click on the ID number of the code to be deleted in the definition list to select.

2. Click the Delete button on the tool bar or select the **File/Delete** option on the File menu..

Section 12: Lists

12

Creating lists

You may find yourself making the same changes again and again to your configuration. For instance, every day during your peak periods you may have to reassign the same group of agents to your busiest queue and then redistribute them again during lulls. CC MIS allows you to make lists to help you make these changes.

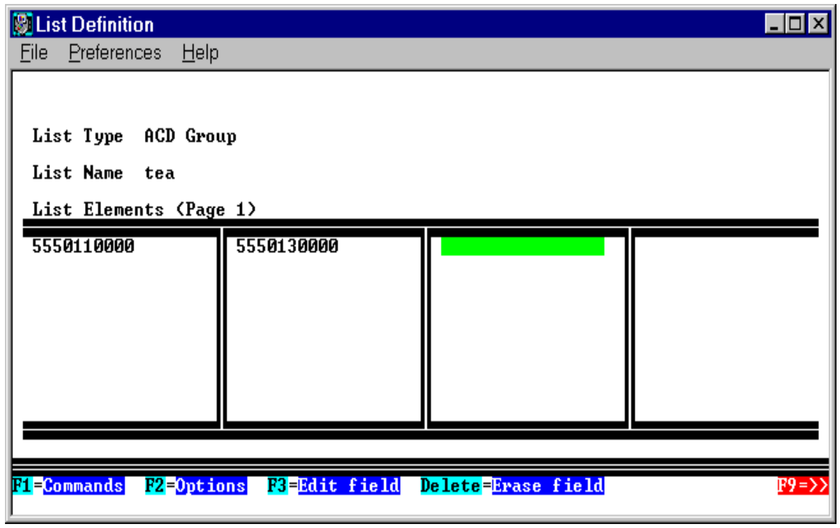
You can make lists of ACD groups, positions, or ACD-DNs. These lists can be selected from the configuration control screen in order to help you make parameter changes to the members of the list. After you create a list, it is available through a function key at the appropriate configuration control screens.

Note: When naming the list, take care to use a name that is not also the name of an ACD group. If the group list and the ACD group have the same name, the system accesses the ACD group rather than the list.

Figure12-1 is an example of the List Definition screen. Table 12-1 lists and describes the lists options screen fields. Perform the steps in Procedure 12-1 to create a list.

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

Figure 12.1 List Definition screen



The order that the ACD Groups are defined is preserved and will help to determine the order that the list items are displayed in real time displays and historical reports that reference this list.

Table 12-1: List definition field descriptions

Field	Values
List Type	1. ACD Group 2. Position 3. ACD DN
List Name	Enter an alphanumeric name not exceeding 16 characters. The name should specifically identify the list you are creating. ***Note:*** When naming the list, take care to use a name that is not also the name of an ACD group. If the group list and the ACD group have the same name, the system accesses the ACD group rather than the list.
List Elements	For ACD groups, enter the ACD group name or primary DN. For Positions, enter a 1- to 4-digit number. For ACD-DNs, enter a DN.

Step 12-1: Creating a list

1. From the main window, select **Admin / Lists**.

   The system displays the List Management screen.

2. Create the list:

   a. Press the [Options] function key to display a menu of choices for the list type. Select one.

   b. Enter a name for the list.

   c. Type the elements of your list. Press the Enter key to move to the next location in the list.

3. Press the [Commands] function key and select Save as a new list definition.

   Note: CC MIS allows you to save multiple list definitions with the sam name. If you are modifying an existing list, save the modificatio by using the Overwrite existing definition command to prevent th system from saving different definitions with the same name.

4. Select Exit (without saving changes).

   The system returns to the Admin menu.

Reading from an existing list

You can also read an existing list, modify it, and save it as a new definition. This allows you to use an existing list as a starting point when you are creating a new list.

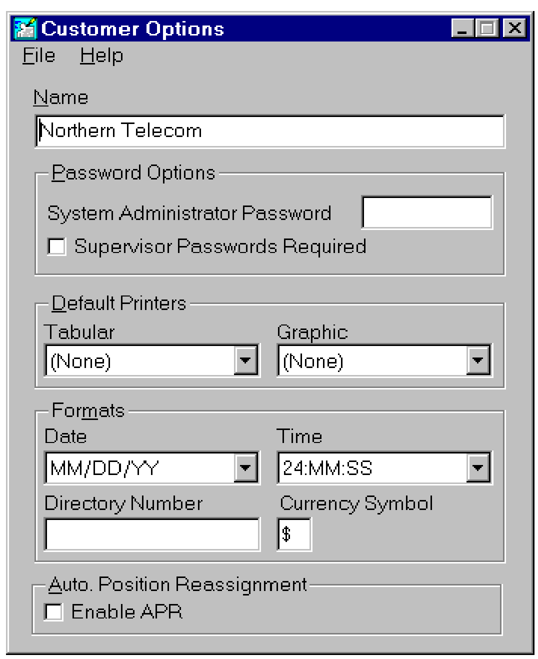
Section 13: Customer options

13

Using Customer Options

The Customer Options screen is used to define the customer name printed on reports, system administrator password, default printers, and the default language for the customer. In addition, this screen allows you to identify the format for the date and time, and the currency symbol used.

Figure 13.1 Customer Options screen



The table below contains a listing of Customer Options screen fields and descriptions.

Table 13-1: Customer options field descriptions

Field	Description
Customer Name	Identifies the customer name printed on reports.
Default Language	Identifies the language that will be displayed for all screens unless otherwise specified through the supervisor's profile. This option only appears for multilingual systems.
Date	Identifies the format in which dates are represented for the customer. Formats include: DD/MM/YY, MM/DD/YY, YY/MM/DD.
Time	Identifies the format in which the time is represented to the customer. Formats include: 12:MM:SS AM/PM and 24:MM:SS.
Directory Number	Identifies the DN format that will be used as the template for displaying DNs. Accepts up to 16 characters (10 digits "#" and 6 characters other than "#"). Sample formats are as follows: Format — Displayed DN "###-###-####" — "012-345-6789" "(###) ###-#### — "(012) 345-6789 "###-####" — "012345-6789" "###-###-###-####" — "012-345-6789" " " (no format) — "0123456789" The "###-###-####" format will be used as the default for new customer partitions. Note: The "|" (vertical bar) character is not allowed within the string. After the format string is filled with digits, excess spaces and punctuation (-.:;,]})>) is stripped from the beginning of the formatted DN.
Currency Symbol	Indicates what character should be used to prefix monetary values in screens and on reports (for example, $).
Supervisor Password	Identifies the system administrator password.
Supervisor Passwords Required	Used to control whether or not the supervisors must define a password in their supervisor profiles.

Table 13-1: Customer options field descriptions

Field	Description
Tabular Printer	Identifies the default tabular printer.
Graphic Printer	Identifies the default graphic printer.
Enable APR	Globally enables/disables the automatic reassignment of agents upon login. This value overrides the settings associated with individual agent definitions.

Section 14: Language option

14

Using Language Options

The Language Options screen allows you to enable the languages to be used throughout the system. You can choose one or more of the supported languages from the Language Options screen.

If only one language is enabled (for example, English), it automatically becomes the default language used.

Figure 14.1 Language Options screen

A language can be disabled only if it is not currently being used.
If only one language is enabled, the Language prompt is not displayed.

Part Two

Admin Functions

Contents:

Section 15: Overview of admin functions

15

Part Two of this guide describes the following system administrators abilities. System administrators can:

- define spectrums for Answering Delay, Abandoning Delay, and Call Duration data fields
- define public tabular and graphic formats
- define formulas for displays and reports
- define public reports
- define schedules
- save change orders
- define public quadrants
- define public screens
- customize color defaults

Note: Additional information all system administrator function can be accessed using the Help button on any screen in CC MIS.

Section 16: Spectrums

16

Introduction

The Delay Before Answering report, Delay Before Abandoning report, and the Call Duration report rely on fields that are spectrums defined by the system administrator. Spectrums are fields that are both time based and consist of multiple categories reflecting different time values. The Spectrum definition screen is accessed using the **Reports/ Spectrum** option.

These reports can be used to portray a distribution of the calls among the various time categories as well as providing a count of the number of calls within each category.

Note:

Prior to release 3.2, the reports did not represent an exact count of the number of calls within each category. In the prior releases, CC MIS normalized data within its internal buckets to conserve disk space. This normalization process was a data compression algorithm that caused some loss in precision. This resulted in minor discrepancies in reports that were based on spectrums.

In release 3.2 the data is no longer normalized. The number of calls in the internal buckets will add up to the spectrum category total for data totals used in custom reports. Percentage totals in the standard reports may still contain minor discrepancies since fractional percentages are rounded.

Defining spectrums

You can define up to ten time categories in each of the following spectrums:

- Answering Delay
- Abandoning Delay
- Call Duration

When defining spectrums, you identify the value of the lower boundaries for each category, except for the first category that is fixed at 0.

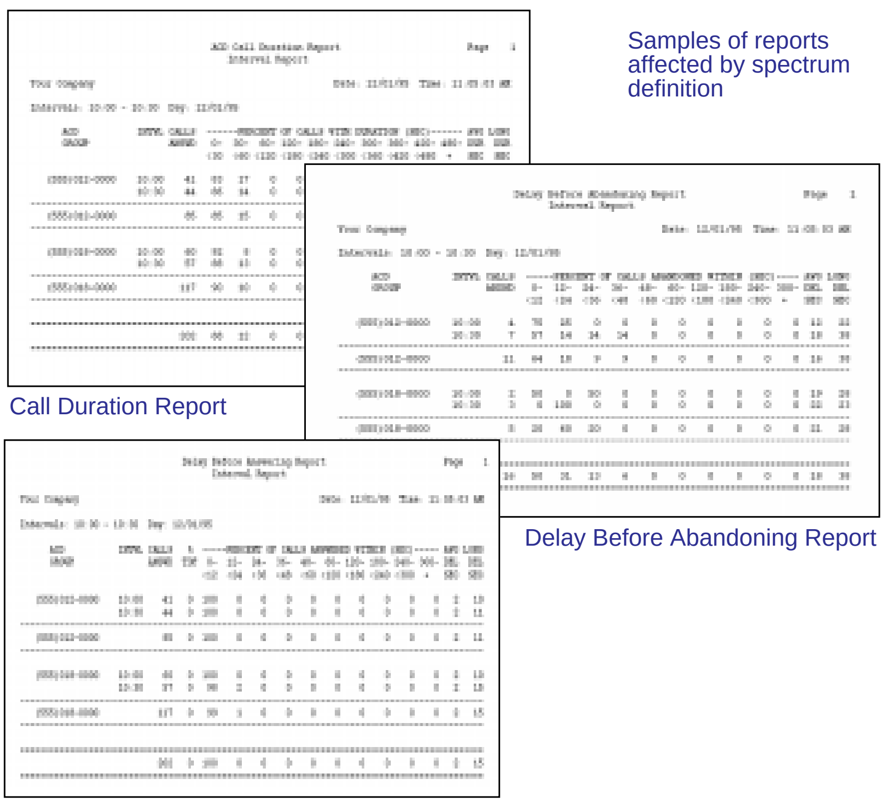
When specifying boundaries, the following rules apply.

- Boundaries set for values 2 thru 60 must be a multiple of 2.
- Boundaries set for values 60 thru 300 must be a multiple of 10.
- Boundaries set for values 300 thru 600 must be a multiple of 60.
- Categories cannot overlap.

Note 1: Changes made in this mode take effect immediately.

Note 2: System Administrators may change spectrums to report on different ranges of values.

Samples of reports affected by spectrum definition



Call Duration Report

Delay Before Abandoning Report

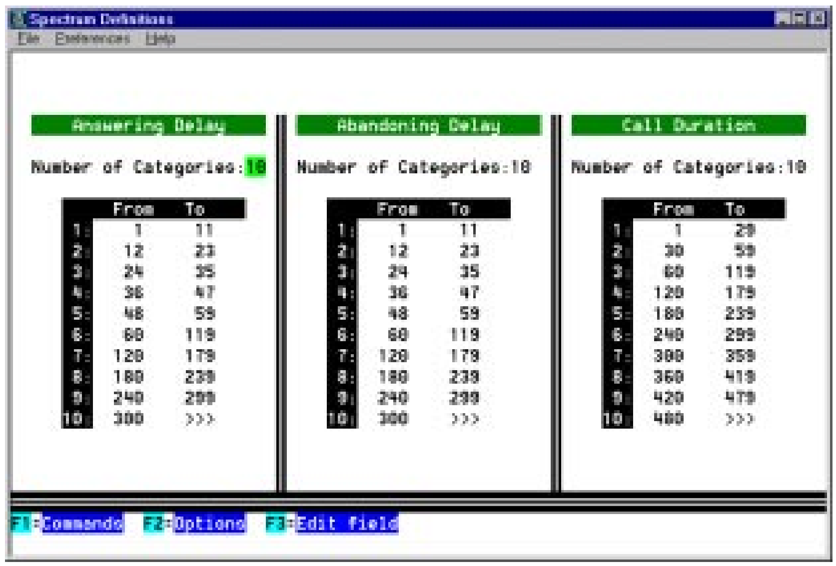
Delay Before Answering Report

Using the Spectrum Definition screen

The spectrum definition screen is used to define categories for incoming calls. Placement of the incoming calls into these categories is based on the delay experienced by the call or the duration of the call.

Define spectrums using the Spectrum Definition screen, illustrated in Figure 16.1. Use the steps in Procedure 16-1 to access the screen.

Figure 16.1 Spectrum Definitions screen



Step 16-1: Accessing the spectrum definition screen

1. From the Main window, select **Reports / Spectrums**.

   The system displays the Spectrum Definitions screen.

2. Update the fields, keeping in mind the rules for specifying boundaries.

   Use arrow and function keys to select and update fields.

3. Use the [Commands] key to save your changes.

Field descriptions

Table 16-1: Spectrum field descriptions

Field(s)	Description
Spectrums: Answering Delay Abandoning Delay Call Duration	The spectrum categories that information about incoming calls can be placed. Each spectrum can have 10 time categories. Each defined category specified in seconds. Value: Field is display only.
Number of Categories	This field allows you to specify the number of categories you want to define under each spectrum. Value: 1 - 10
1 - 10 category fields	The number of category fields displayed under each spectrum is determined by the value entered in the Number of Categories field. Each category field allows you to specify the lower boundary. ***Note:*** Values enter in each field cannot overlap. Values: --- between 0 - 59 must be multiple of 2 between 60 - 300 must be multiple of 10 between 300 - 600 must be multiple of 60

Explanation of percentage totals

Percentages used in standard reports may contain fractional discrepancies due to fractional rounding. The example below shows this rounding.

	1	2	3	4	5	Totals
52	12	12	12	8	8	= 52
CC MIS Internal Count	23.08	23.08	23.08	15.38	15.38	= 100 %
Displayed Precentages	23	23	23	15	15	= 99%

The internal count for percentages internal to CC MIS add up to 100%. However, due to the fractional rounding (CC MIS does not display fractional percentages) the displayed percentage equals to 99% when summed. The data will add correctly (that is, 12 + 12 + 12 + 8 + 8 = 52) but the displayed percentages may not add to 100% if the percentages contain fractional values (for example 12 is 23.08% of 52).

Section 17: Report formulas

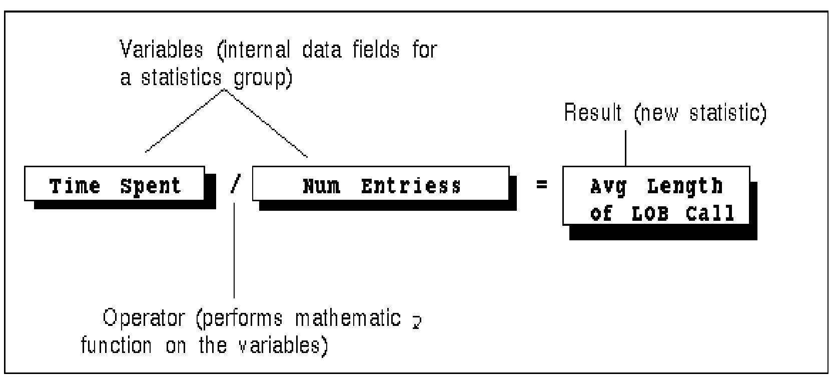
17

Creating formulas for reports

A system administrator can define formulas that manipulate the raw statistics collected by CC MIS. The number resulting from the calculation can then be used in reports.

A formula consists of variables, operators, and a result, as illustrated in the figure below.

Figure 17.1 Elements of a report formula



The variables in the formula are the internal data fields specific to a statistics group.

CC MIS stores statistics in the following statistics groups:

- Destination ACD-GRP statistics
- Overflow statistics
- Agent statistics
- LOB statistics
- Walkaway statistics
- ACD-DN statistics

Note: Refer to Appendix A of the *CC MIS Supervisor's Guide* for a list of all internal data fields by statistic group.

The mathematical operators perform mathematical functions using the variables. When more than one operator is used in the formula, the * and / operators have precedence over the + and - operators; meaning the system multiplies and divides to get an intermediate result and then adds to or subtracts from that result to complete the calculation. The maximum > and minimum < operators have the highest precedence.

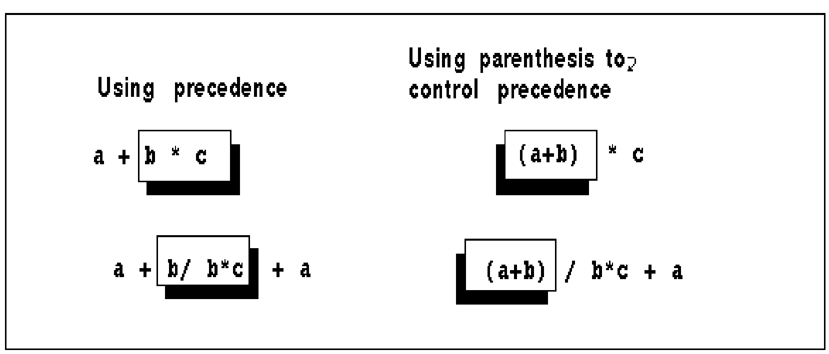
The function of these two operators is as follows:

Minimum: 6 < 9 = 6
Maximum: 6 > 9 = 9

The precedence order is: >,<.*, /, +, -. Use parentheses to override this precedence and control the order in which the system performs the mathematical operations. Figure 139 illustrates these concepts.

Note: The system removes unnecessary parentheses. You do not need to use parentheses when precedence is the correct order in which to manipulate the variables.

Figure 17.2 Using parenthesis to control precedence in formulas



Using the Report Formula Definition screen

Define formulas using the Report Formula Definition screen, shown in the figure below. The table below identifies the fields in the screen.

Note: CC MIS allows you to save multiple report formula definitions with the same name. If you are modifying an existing report formula definition, save the modification by using the Overwrite an existing formula command to prevent the system from saving different definitions with the same name.

Figure 17.3 Report Formula Definition screen

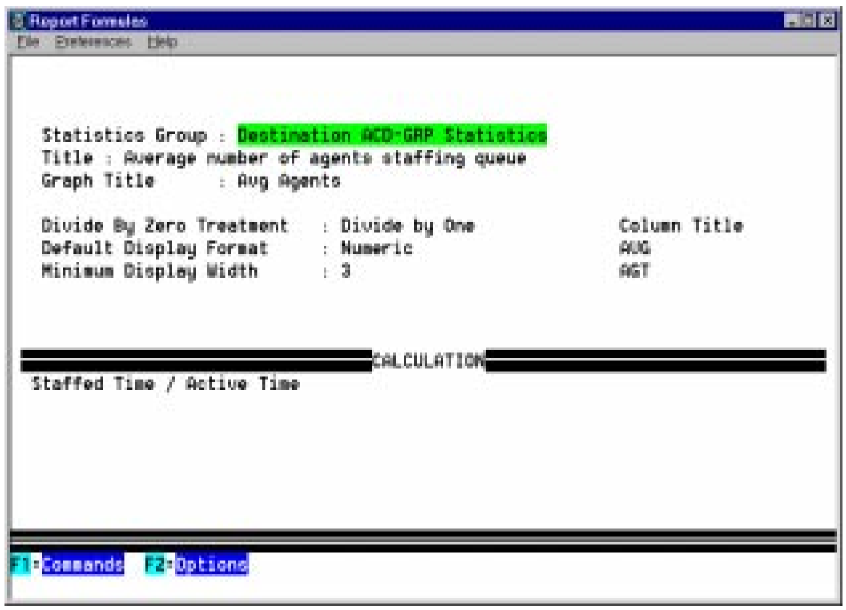


Table 17-1: Report formula definition screen field descriptions

Field	Description
Statistics Group	Use the Options key to enter the statistics group to which the formula's result belongs.
Title	This is the text that describes the formula in menus. This is a multilingual text definition field with a maximum length of 50 characters. Text for this field may be defined in other available languages by toggling the language field on the screen.
Graph Title	Enter a 12-character title for the statistic to be used when it is printed in graphic format.

Table 17-1: Report formula definition screen field descriptions

Field	Description
Divide by Zero Treatment	Use the Options key to enter the Divide by Zero Treatment. This field defines how the calculation handles situations where a division by 0 might occur. Values: Divide by 1 or Force to 0.
Column Title	This field defines the title of the statistic to be used when it is printed in tabular format. The title cannot be longer than the Minimum Display Width.
Default Display Format	This field identifies the format of the calculation result. Values: Numeric = The result appears as an absolute number. Percentage = The result appears as a percentage. currency = The result appears as a currency value. seconds = The result appears as seconds. minutes = The result appears as minutes. mm:ss = The result appears as minutes and seconds. hh:mm = The result appears as hours and minutes. hh:mm:ss = The result appears as hours, minutes, and seconds.
Minimum Display Width	This field defines the minimum number of characters in the display. This value must be compatible with the Default Display Format. Numeric values cannot exceed nine characters.
(Language)	The language in which the label names must be entered. This parameter only appears if multiple languages have been enabled in the Language Options screen of Parameter Administration.
Calculation	Press the Add a field key to enter a variable and the internal data fields available are displayed. Use the up/down arrow keys to select the data field. To enter a mathematical operator (>, <, +, -, *, /), use your keyboard. Note: You only need to use parenthesis to control the order of the mathematic functions. For example, (a + b) * c adds a and b together and then multiplies that result by c. a + b * c multiplies b and c and then adds that result to a.

Use the steps below to update a report formula definition.

Step 17-1: Updating the report formula definition

1. From the main window, select Reports / Formulas.

   The system displays the Report Formula Definition screen.

2. Using arrow and function keys, select and update fields.

   Note: If the field is grayed, you cannot select or update that field.

3. Use the [Commands] key to save changes.

   Note: CC MIS allows you to save multiple report formula definitions with the same name. If you are modifying an existing report formula definition, save the modification by using the Overwrite an existing formula command to prevent the system from saving different definitions with the same name.

Reading an existing formula

Once formulas have been defined, you can use them as a basis to create new formulas. To view an existing formula, use the Report Definition (Text) or Reports / Formulas (Windows) menu option to access the Formula Definition screen, and enter the statistics group.

Use the [Commands] key to display and select the Read an existing formula command.

At the Read which formula? pop-up, scroll through the options and highlight the formula you wish to use. Modify the formula then save as a new formula.

Access to custom formulas

Custom formulas are available to all supervisors who have Report Options enabled in their privilege level. There can be up to 100 custom report formulas per statistical group defined in CC MIS.

Note: To read the custom formula from the [Commands] menu, the statistics group must be already entered in the screen.

Section 18: Creating a report

18

Introduction

While CC MIS provides standard reports for each statistic group, system administrators can create additional reports. The process of creating a report is as follows:

- define the report format
- define the report parameters

Defining a report format

The report format defines the layout of a report. You can define graphic or tabular formats.

Tabular reports

You control spacing, the order of columns, and column headings for tabular reports through report format. The column headings identify the information collected from the historical database or generated from the statistics in the historical database. The actual text that appears in the column heading can be changed or customized. If you choose not to change or customize the heading text, then the default heading defined with the formula appears.

Note: In order to use a formula in a report format, the formula must already be defined.

Graphic reports

CC MIS can create the following types of graphs through the Graphic Report Definition screen:

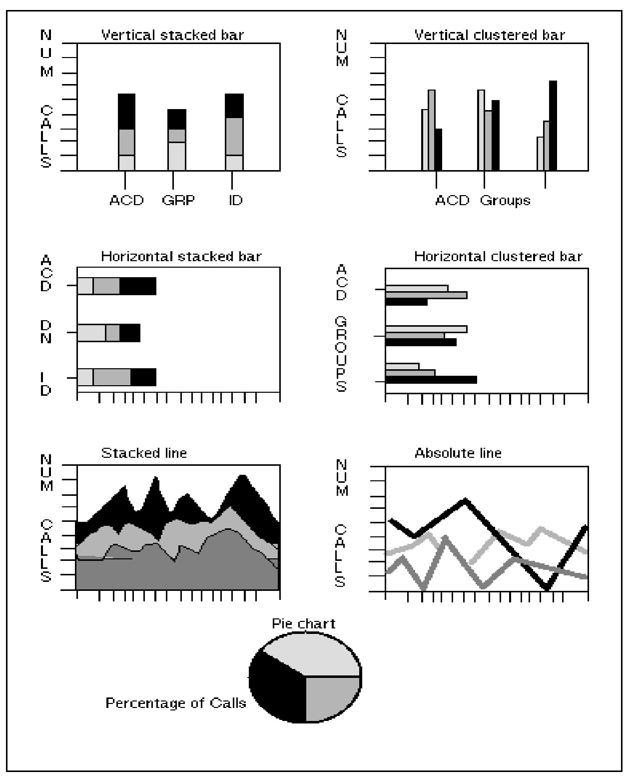
- vertical stacked or clustered bar
- horizontal stacked or clustered bar
- stacked line (see note)
- absolute line
- pie chart

Note: Stacked lines require a minimum of two points to display correctly.

The axis headings of the graph identify the information collected from the historical database or generated from the statistics in the historical database.

Note: In order to use a formula in a report format, the formula must already be defined.

Figure 18.1 Types of graphs used in graphic report formats



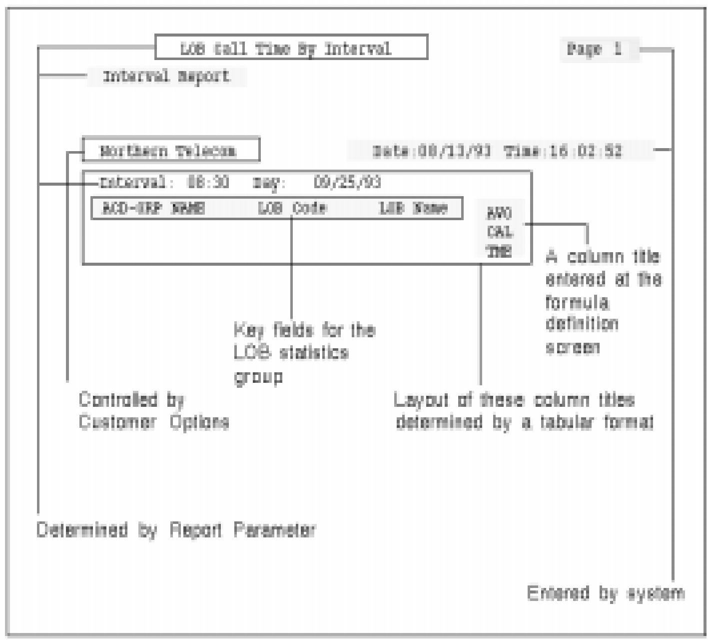
Defining report parameters

Report parameters identify the groups on which the statistics are reported and the time for which statistics are gathered. The report parameters identify the report as tabular or graphic in format, and determines the report title printed on the report.

Example of a report

The figure below identifies where elements of a report are defined in CC MIS screens.

Figure 18.2 Where report fields are defined



Formatting your reports

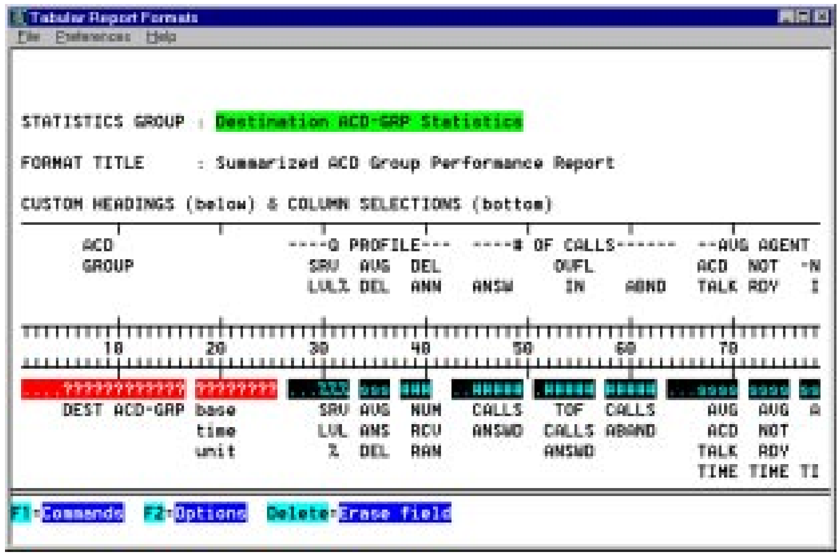
You determine the style of a report by creating a tabular or graphic format. The format identifies the statistics provided in the report.

Using the Tabular Report Formats screen

You define tabular formats using the Tabular Report Formats screen, as shown in the figure below.

Note: CC MIS allows you to save multiple report formats with the same name. If you are modifying an existing report format, save the modification by using the Overwrite an existing format command to prevent the system from saving different formats with the same name.

Figure 18.3 Tabular Format Definition screen



The table below is a listing of the fields in the Tabular Report Formats screen and provides a description for each field.

Table 18-1: Tabular report formats screen field descriptions

Field	Description
Statistics Group	Choose one of the following statistics groups: - Destination ACD GRP Statistics - Overflow Statistics - Agent Statistics - LOB Statistics - Walkaway Statistics - ACD-DN Statistics
Format Title	Enter a title that identifies the content of this report format. This name will appear in the menu when the report parameters are defined.
Custom Headings	Allows you the opportunity to create new headings. If you do not create new headings, the system uses the default headings associated with the chosen data fields or formulas. ***Note:*** Do not define headings for the base time unit field as this heading is set automatically based on report parameters.
Column Selections	Allows you to select the data fields or formulas used in the format.

Use the steps below to access the Tabular Report Formats screen.

Step 18-1: Accessing the tabular formats screen

1. From the main window, select **Report / Tabular** Formats.

   The system displays the Tabular Report Formats screen.

2. Using arrow and function keys, select and update fields.

   Note: If the field is grayed, you cannot select or update that field.

3. Use the [Commands] key to save changes.

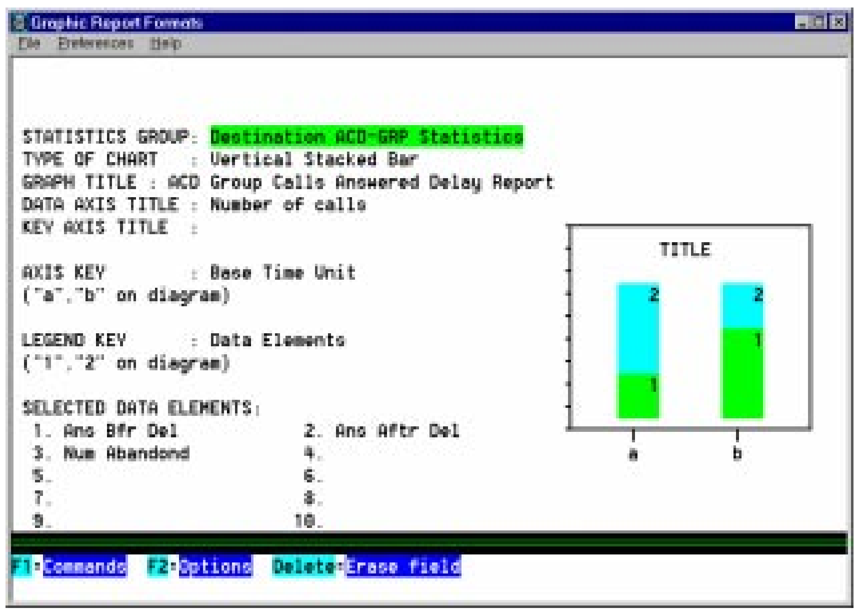
Note: CC MIS allows you to save multiple report formats with the same name. If you are modifying an existing report format, save the modification by using the Overwrite an existing format command to prevent the system from saving different formats with the same name.

Using the Graphic Report Formats screen

You define graphic formats using the Graphic Report Formats screen, as shown in the figure below.

Note: CC MIS allows you to save multiple report formats with the same name. If you are modifying an existing report format, save the modification by using the Overwrite an existing format command to prevent the system from saving different formats with the same name.

Figure 18.4 Graphic Report Formats screen



The table below lists the fields of the Graphic Reports Formats screen and provides a description for each field.

Table 18-2: Graphic report formats screen field descriptions

Field	Description
Statistics Group	Choose one of the following statistics groups: - Destination ACD GRP Statistics - Overflow Statistics - Agent Statistics - LOB Statistics - Walkaway Statistics - ACD-DN Statistics

Table 18-2: Graphic report formats screen field descriptions

Field	Description
(Language)	The language in which the format title is entered. This parameter only appears if multiple languages have been enabled in the Language Options screen of Parameter Administration.
Type of Chart	Choose the type of chart (graph): - pie chart - absolute line - stacked line - horizontal clustered bar - horizontal stacked bar - vertical clustered bar - vertical stacked bar
Graph Title	Enter a title using up to 40 characters. This name will appear in the menu when the report parameters are defined.
Key Axis Title	This field identifies information that remains constant on graphs. Enter the data that coordinates with the type of chart: Vertical bar/line graphs = Horizontal axis Horizontal bar charts = Vertical axis Pie charts = None
Axis Key	This field breaks down information along the key axis. You are prompted to edit this field if the type of the graph is vertical bars, horizontal bars, or line graphs.
Legend Key	This field is the secondary breakdown of information along the key axis. You are prompted to edit this field if the type of the graph is vertical bars, horizontal bars, or line graphs.
Selected Data Elements	Choose data fields for the graph. CC MIS provides a list that corresponds to the chosen statistics group. For vertical bars, horizontal bars, or line graphs, you can choose up to ten elements. For pie charts, you can choose up to eight elements.

Use the steps below to access the Graphic Report Formats screen.

Step 18-2: Accessing the graphic formats screen

1. From the main window, select **Reports / Graphic** Formats.

   The system displays the Graphic Report Formats screen.

2. Using the arrow and function keys, select and update fields.

   Note: If the field is grayed, you cannot select or update that field.

3. Use the [Commands] key to Save your changes.

   Note: CC MIS allows you to save multiple report formats with the same name. If you are modifying an existing report format, save the modification by using the Overwrite an existing format command to prevent the system from saving different formats with the same name.

Entering data fields or formulas in the format

To enter data fields or formulas, access the Column Selections field (tabular) or the Selected Data Fields (graphic). Use the [Change field] key to list the options for the field.

Standard report formats

CC MIS has a variety of standard report formats available (24 tabular and 4 graphic report formats). These formats have a pre-determined statistics group. Standard report formats are identified with a RED icon (only in Windows).

Accessing standard report formats

To access the standard report formats, access the Tabular Format Definition screen. Use the [Commands] key to select the Read an existing format option. The system displays the Read which format? pop-up that contains the standard formats.

Reading an existing report format

Once a report format has been defined, you can use it as a basis to create new formats. To read an existing report format, access the Report Format Definition screen (tabular or graphic), and enter the statistics group. Use the [Commands] key to display and select the Read an existing format command. At the Read which format? pop-up, scroll through the options and highlight the format you wish to use.

Controlling the space between report columns

When formatting your report, you determine the space between the report columns when accessing the Column Selections portion of the Report Format screen. Highlight the Column Selections portion of the screen using the arrow keys. Press the [Change field] key. Use the left/right arrow key to highlight the column requiring spacing. Press the [Increase width] key or the [Decrease width] key as many times as needed to space out the column. You may also precede these keys with a number specifying how many spaces to increase or decrease by. Press the [Finished] key when finished spacing out the columns.

Note: You may need to press the [=>>] key to display these keys on your screen.

Creating a public report format

When you save a format, you have the option of saving it as a public format. Public formats are available to all supervisors who have Report Options, Public Reports enabled in their privilege level. There can be up to 100 public graphic formats and 100 public tabular formats. Public report formats are identified with a YELLOW icon (only in Windows interface).

Creating a personal report format

When you save a format, you have the option of saving it as a personal format. This type of format is available only to you. Likewise, if another system administrator or a supervisor created a personal format, you would not be able to access it. There can be up to five personal graphic report formats and five personal tabular report formats per supervisor.

After you have saved a personal report format, you can make it public again without recreating it by reading in the format and saving it as a public format. At this point, two formats exists: one public and one personal with the same name. The personal format can then be deleted. Personal report formats are identified with a GREEN icon (only in Windows interface).

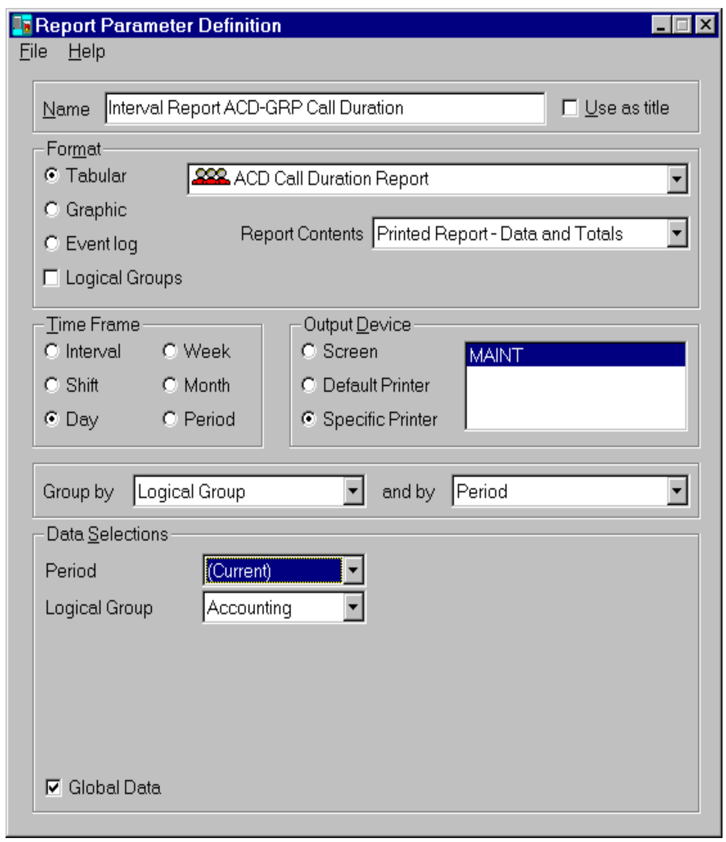
Defining report parameters

Report parameters identify the groups on which statistics are reported and the time for which statistics are gathered. The report parameters identify the report as tabular or graphic in format, and determines the report title printed on the report.

You define report parameters using the Report Parameter Definition screen, as shown in the figure below.

Note: CC MIS allows you to save multiple report parameter definitions with the same name. If you are modifying an existing report parameter definition, use the Save command to overwrite the existing definition in the Windows interface. In the Text interface, use the Overwrite an existing report definition. By using these commands, you prevent the system from saving different report parameter definitions with the same name.

Figure 18.5 Report Parameter Definition screen



The table below provides a listing of the Report Parameter Definition screen fields with descriptions.

Table 18-3: Report parameter definition screen field descriptions

Field	Description
Report Name	Choose a name that identifies the report.
(Language)	The language in which the report name is entered. Appears only on multilingual systems.
Use of Name (Text only) Use as title (Windows only)	Choose location of the name: 1. In the menu only to choose the report. 2. Use as report title in menus and on reports.
Style	Choose either tabular, graphic or event log.
Format	Choose either a standard, public, or personal format definition.
Report Contents	This parameter has three options: Printed Report - Data and Totals - This causes a complete report to be generated with all headers, detail lines, total lines, and total line separators. Printed Report - Totals Only - Causes only the total lines to be printed. This is useful if the detailed information is not required, thus creating a smaller, more concise report. Total lines are generated whenever the key fields change. A grand-total line is generated at the end of the report. Data Export Report - Generates a report containing only the detail lines. No headers, total lines, or separator lines are generated. This is intended for use when a PC or other system is attached to the printer port and eases the processing of the data by that system. All values are separated with commas. Text values are enclosed in quotes (").

Table 18-3: Report parameter definition screen field descriptions

Field	Description
Time Frame	Choose the granularity of data to be used in the report. 1. intervals 2. shifts 3. daily 4. weekly 5. period 6. monthly Note: Periods and shifts are defined in Time Frame Definition under Parameter Definition.
Logical Groups	Choose Y / N (in Text) or enable the option (in Windows) to include logical groups in the generated report.
Group By/And By	Provides subtotals according to the chosen criteria.
Totals Only	Simplifies data printed in report by displaying only totals for each field. Choose Yes or No.
Data Selections Report Ranges (Text)	This area contains the data selection key fields. Selection of a value for each field is from the drop down menu, displayed by clicking on the down arrow. The values for the Interval, Day, Shift, Week, Month, and Period key fields are: All, Range, Previous, and Current. All is applied as a default (equivalent to leaving the key range field blank in previous CC MIS releases). Range allows for the entry of a single value or a range of values. Current is for current period. Previous is the same as entering -1 in previous CC MIS releases. Note: The drop down menus for the Src ACD Group and Dst ACD Group fields will also contain all previously defined ACD Group lists. Logical Group contains all defined logical groups, but does not contain a (Range) option. These are data elements for which ranges can be provided: intervals, shifts, days, weeks, months, periods, agents, subgroups, ACD groups, ACD-DNs, LOB codes, walk-away codes, and logical groups.

Table 18-3: Report parameter definition screen field descriptions

Field	Description
Global Data	This field appears only if the supervisor has global view enabled in their profile. Specifying global data in the report parameter will bypass scope restrictions when the report is generated.
Output Device	Choose the destination of the report by entering one of the following: 1. Screen to first preview the report on-line 2. Default printer 3. any system defined printer
Language of Report	This parameter only appears if multiple languages have been enabled in the language options screen of parameter administration. This parameter allows the supervisor to specify the language to be used when the report is generated.

Step 18-3: Accessing the report parameter screen

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

   The system displays the Report Parameter Definition screen.

2. Using buttons, menus, and check boxes, select and update fields.

3. Save your changes using either the File / Save (to overwrite an existing report) or File / Save As (for a new report).

Note: CC MIS allows you to save multiple report parameter definitions with the same name. If you are modifying an existing report parameter definition, save the modification by using the File / Save option to prevent the system from saving different report parameter definitions with the same name.

4. Selecting Save As to save a new report, displays the Save Report Definition As? screen. Select New Public or New Private. Click OK.

Creating a public report

When you save a report parameter definition, you have the option of saving it as a public report definition. Public report definitions are available to all supervisors who have Report Options, Public Reports enabled in their privilege level. There can be up to 250 public report parameters defined in CC MIS. (You cannot save a public report that uses a personal format.)

Creating a personal report

When you save a report parameter definition, you have the option of saving it as a personal report definition available only to you. Likewise, if another system administrator or supervisor created a personal report definition, you would not be able to access it.

There can be up to five personal report parameter definitions per administrator. Once you have saved a personal report format, you cannot make it public again without recreating it. You can make it public by following similar steps outlined in the section entitled Creating a Public Format, presented earlier in this chapter.

Scheduling reports and configuration changes

A system administrator can create schedules and attach reports to the schedule to automate its printing. Likewise, a system administrator can attach configuration changes to the schedule to automate the change.

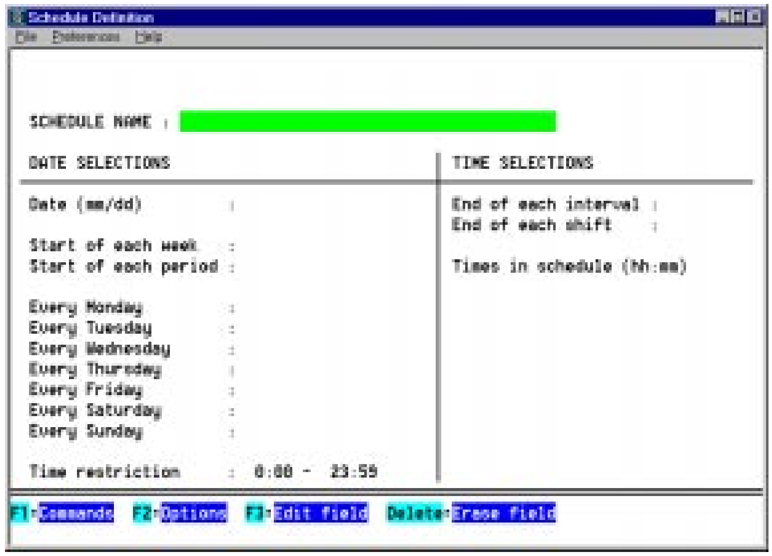
Note: Scheduled reports must have the print device set to a printer and not to the screen. Otherwise, the printing of the report defaults to the customer options default printer.

Defining schedules

Define a schedule using the Schedule Definition screen, shown in the screen below. There can be up to 100 schedules defined.

Note: CC MIS allows you to save multiple schedule definitions with the same name. If you are modifying an existing schedule, use the Overwrite an existing schedule definition to prevent the system from saving different schedules with the same name.

Figure 18.6 Schedule Definition screen



Note: At midnight, CC MIS performs data compaction. Reports should be scheduled so that they are not printed during this compaction activity.

The table below lists the Schedule Definition screen fields with descriptions.

Table 18-4: Schedule definition screen field descriptions

Field	Description
Schedule Name	Defines the name that appears in the schedule selection menu.
Date Selections	
Date	Use the mm/dd format to schedule a specific date. (**/**= everyday of every month)
Start of Each Week	Enter an asterisk (*) if you want the attached reports and/or change orders to execute on the first day of each week as defined in parameter administration. Otherwise, leave this field blank.
Start of Each Period	Enter an asterisk (*) if you want the attached reports and/or change orders to execute on the first day of each period as defined in parameter administration. Otherwise, leave this field blank.

Table 18-4: Schedule definition screen field descriptions

Field	Description
Every Monday...	Enter an asterisk (*) by each day that you want the attached reports and/or change orders to execute. Otherwise, leave this field blank. Note: The Every Monday ... field(s) override the Date field (described above). You cannot specify a date and select this field(s). If you do, on the next Monday ..., the schedule executes regardless of the date specified in the Date field.
Time Restriction	Enter the starting and ending time of day in the schedule. Times specified in the schedule outside of this range are not effective.
Time Selections	
End of Each Interval	Enter an asterisk (*) if you want the attached reports and/or change orders to execute at the end of each interval within the time restriction. Otherwise, leave this field blank.
End of Each Shift	Enter an asterisk (*) if you want the attached reports, or change orders, or both to execute at the end of each shift within the time restriction.
Time in Schedule	Use the hh:mm format to enter a specific time or times. The asterisk (*) can be used in the hours portion to specify all hours. Times outside the time restriction are ignored.

Attaching reports and change orders to a schedule

Once you have defined a schedule, you can attach reports or configuration changes to the schedule.

There can be up to 100 reports scheduled per schedule definition and 1000 scheduled reports in the system. Likewise, there can be 100 change orders scheduled per schedule definition and 1000 scheduled change orders in the system. A schedule may have both reports and change orders attached.

Note: When printing a report that has been attached to a schedule, the print device must be set to a printer and not to the screen. Otherwise, the printing of the report defaults to the customer options default printer.

Step 18-4: Attaching reports to a schedule

1. Select Admin/Schedules to access the Schedule Definition screen. Select the schedule you want to use.

Note: You can use the Read an existing schedule option from the commands pop-up.

2. Access the Commands pop-up. Select the Attach reports to this schedule option.

   The system displays the Scheduled Reports and Copies prompts.

3. Enter the reports you want to schedule. Use the [Options] key to display your options.

Note: The Add Multiple Reports key allows you to add many reports at one time.

4. Use the [Commands] key to select Save as a new schedule. The system prints the reports you identified according to the schedule you selected.

Step 18-5: Attaching change orders to a schedule

1. Identify your change order using the Configuration Control menu.

2. Select Admin/Schedules to access the Schedule Definition screen. Select the schedule you want to use.

Note: You can use the Read an existing schedule option from the commands pop-up.

3. Access the Commands pop-up. Select the Attach change orders to this schedule option.

Note: If you have no change orders identified in the system, you cannot access this option.

   The system displays the Scheduled Change Orders prompt.

4. Enter the change orders you want to schedule. Use the [Options] key to display a list of change orders.

5. Use the [Commands] key to select Save as a new schedule. The system executes the configuration changes according to the schedule you selected.

Deleting schedules and scheduled change orders

If you have scheduled a change order you wish to cancel, and the order has not been executed, access the Schedule Definition screen. Use the [Commands] key to select the Delete an existing schedule definition option. At the Delete which schedule definitions(s)? pop-up, select the schedule that has the attached change orders.

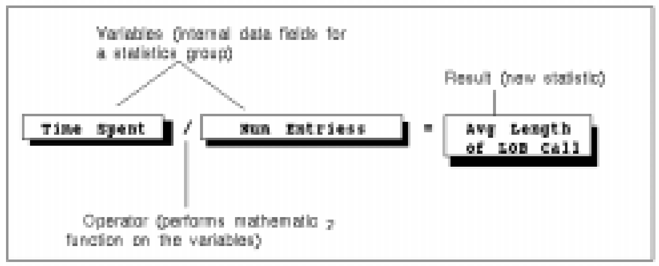
Note: This action deletes the entire schedule. If you want to remove a change order but keep the schedule, remove the change order from the schedule by pressing [Commands] key on the Schedule Definition screen and selecting Attach change orders to this schedule option from the commands menu. The screen is redrawn with a list of attached Change Orders. Highlight the Change Order to be deleted and press the [Delete] key.

Creating formulas for displays

A system administrator can define formulas that manipulate the raw statistics collected by CC MIS. The number resulting from the formula calculation can then be displayed in custom Queue Statistics Displays.

A formula consists of variables, operators, and a result, as illustrated in the figure below.

Figure 18.7 Elements of a display formula

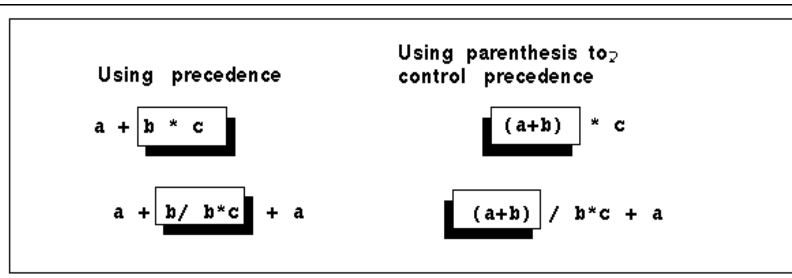


The variables in the formula are internal data fields specific to the Queue Statistics Display.

The mathematical operators perform mathematical functions using the variables. When more than one operator is used in the formula, the * and / operators have precedence over the + and - operators; meaning the system multiplies and divides to get an intermediate result and then adds to or subtracts from that result to complete the calculation. The maximum > and minimum < operators have the highest precedence. The order is: >, <,*, /, +, -. Use parentheses to override this precedence and control the order in which the system performs the mathematical operations. the figure below illustrates these concepts.

Note: The system removes unnecessary parentheses. You do not need to use parentheses when precedence is the correct order in which to manipulate the variables.

Figure 18.8 Using parenthesis to control precedence in formulas



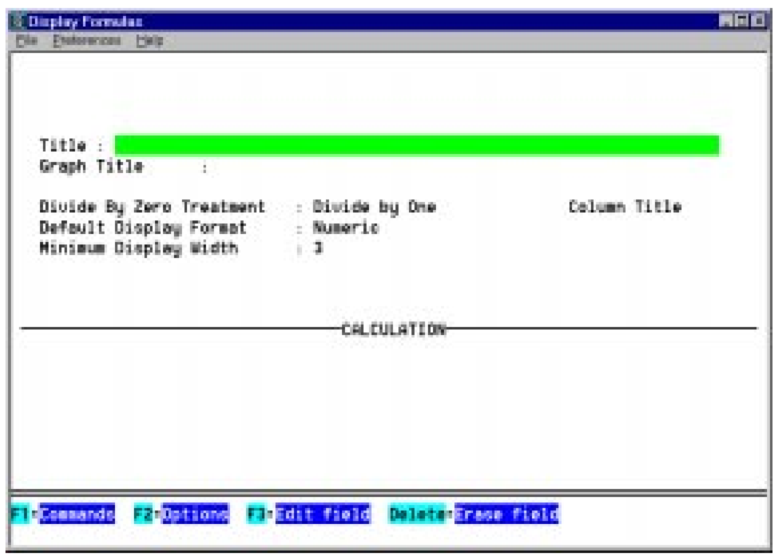
Refer to Appendix B of the *Supervisor's Guide*, NTP 297-2671-340, for a list of all Queue Statistics Display internal data fields.

Using the Display Formulas Definition screen

You define formulas using the Display Formula Definition screen, as illustrated in the figure below.

Note: CC MIS allows you to save multiple display formula definitions with the same name. If you are modifying an existing display formula definition, save the modification by using the Overwrite an existing formula command to prevent the system from saving different definitions with the same name.

Figure 18.9 Display Formulas screen



The table below contains a listing of the Display Formula Definition screen fields with descriptions

Table 18-5: Display formula definition screen field descriptions

Field	Description
Title	Enter a description of the formula's result. This Text helps identify what the result represents. The title describes the formula in menus used in the Quadrant Definition screen.
Graph Title	Enter a 12-character title for the statistic to be used when it is displayed as a graph.

Table 18-5: Display formula definition screen field descriptions

Field	Description
Divide by Zero Treatment	Use the [Options] key to enter the divide-by-zero treatment. This field defines how the calculation handles situations where a division by 0 might occur. Values: Divide by 1 or Force to 0.
Column Title	This field defines the title of the statistic to be used when it is displayed in tabular format. The title cannot be longer that the Minimum Display Width described in this table.
Default Display Format	This field identifies the format of the calculation result. Values: Numeric = The result appears as an absolute number. Percentage = The result appears as a percentage. currency = The result appears as currency value. seconds = The result appears as seconds. minutes = The result appears as minutes. mm:ss = The result appears as minutes and seconds. hh:mm = The result appears as hours and minutes. hh:mm:ss = The result appears as hours, minutes, and seconds.
Minimum Display Width	This field defines the minimum number of characters in the display. This value must be compatible with the Default Display Format. Numeric values cannot exceed nine characters.

Table 18-5: Display formula definition screen field descriptions

Field	Description
Calculation	To enter a variable, press the Add a field key. The system displays the internal data fields that are available to you. Use the up/down arrow keys to select the data field. To enter a mathematical operator (>, <, +, -, /, *) use your keyboard. Note: You only need to use parenthesis to control the order of the mathematical functions. For example, (a + b) * c adds a and b together and then multiplies that result by c. a + b * c multiplies b and c and then adds that result to a.

Procedure for updating the Display Formula Definition screen is presented in the steps below.

Step 18-6: Updating a display formula

1. Define your formula as follows:

   a. From the main window, select Displays / Formulas.

   b. Enter the Title and Graph Title.

   c. Use the [Options] key to set the Divide by Zero Treatment.

   d. Use the [Options] key to set the Default Display format.

   e. Enter the Minimum display width.

   f. Enter the column title by pressing the [Edit field] key and typing the title.

Note: The column width limits the title length; you may use more than one line to enter a title.

   g. Press the [End Editing] key.

2. Enter the calculation.

   a. Highlight the CALCULATION field.

   b. Press the Change field key.

   c. Press the Add field key and select your data fields.

   d. Use the keyboard to enter the mathematical operators (> < * / + -).

   e. Press the Edit done key.

3. Save the formula definition.

   a. Press the [Commands] key.

   b. Select Save as a new formula.

   c. Select Exit (without saving changes).

Note: CC MIS allows you to save multiple display formula definitions with the same name. If you are modifying an existing formula definition, save the modification by using the Overwrite an existing formula command to prevent the system from saving different definitions with the same name

Using existing formulas as templates

You can use existing formulas as a template to create new definitions. To read an existing formula, access the Display Formula Definition (Text) or Display Formulas (Windows) screen. Use the [Commands] key to display and select the Read an existing formula command. At the Read which formula? pop-up, scroll through the options and highlight the formula you wish to use. Make any necessary changes to the formula and use the [Commands] key to save it as a new formula.

Granting a supervisor access to formula definitions

Give a supervisor access to any formula by enabling Display Options, Formulas in their privilege level. There can be up to 100 custom display formulas per partition.

Section 19: Custom queue statistics displays

19

Introduction

While CC MIS provides standard queue statistics displays, system administrators can create custom queue statistics displays. The process of creating a custom queue statistics display is to define the quadrant(s) then define the screen.

Defining a quadrant

Quadrant definition determines the data displayed, its format, and its size. You control spacing, the order of columns, and column headings within the quadrant when you define the quadrant.

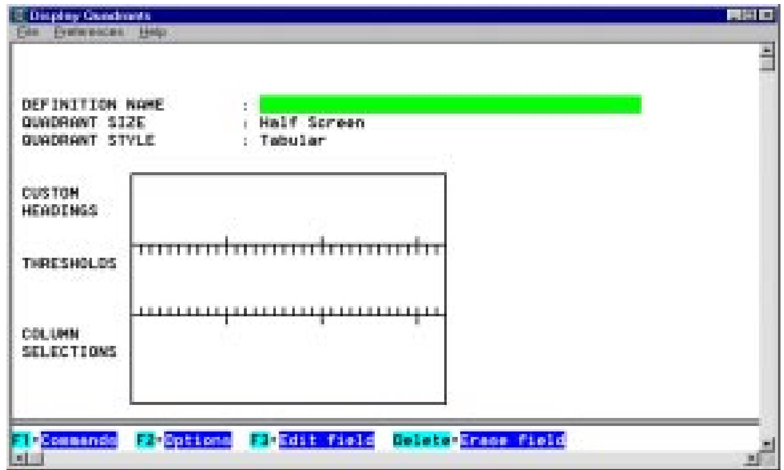
Note: In order to use a display formula in a quadrant definition, it must already be defined.

Defining a tabular quadrant

You define tabular quadrants through the Quadrant Definition screen.

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

Figure 19.1 Display Quadrants screen for a tabular quadrant



Fields and Descriptions

Table 19-1: Display quadrants (tabular) screen field definitions

Definition Name	Enter a name for the definition. The name identifies the definition in menus of defined quadrants and should be unique and can be up to 40 characters in length.
Quadrant Size	Choose either half screen or full screen using the [Options] function key.
Quadrant Style	Choose either Tabular or Graphic using the [Options] function key.
Custom Heading	Define your own headings using up to three lines. If fewer than three lines are used, then the system automatically adjusts the screen area to allow for more data.
Column Selections	Choose any combination of standard and custom formulas. Use function keys to make selections in this field.

Table 19-1: Display quadrants (tabular) screen field definitions

Thresholds	Choose to assign thresholds to one or more columns in a quadrant. This field cannot be entered until at least one column selection has been made. Note: Thresholds are defined as a group. These thresholds have no relation to DMS ACD thresholds. The following are values for the system wide threshold field. Type: 1. >Group Threshold 2. <Group Threshold 3. >Constant Threshold 4. <Constant Threshold Value (If Group Threshold is selected) 1.TLK = ACD Talk 2. NTR = Not Ready 3. IDL = Wait 4. DLY = Delay Objective 5. SRV = Service Objective 6. ASA = Average Answer Delay 7. CIQ = Calls Waiting 8. SC = Short Call 9. WLK =Walkaway 10. HLD = Hold 11. SDI = Short DN In 12. SDO = Short DN Out 13. UD1 = unnamed 14. UD2 = unnamed 15. UD3 = unnamed 16. UD4= unnamed 17. UD5 = unnamed (UD1-UD5 are defined in Admin/Threshold) Value (If Constant Threshold is selected) Numeric: 0 through 9999 (Based on column width)
Color	Choose a color for the threshold value. The " X" in the color subfield shows the color scheme that was selected.

Use the steps below to define a quadrant

Step 19-1: Defining a quadrant

1. Define the quadrant.

   a. From the main window, select Displays / Quadrants.
   b. Using buttons, menus and check boxes, select and update the fields

2. Enter the thresholds for the data fields.

   a. Highlight the Thresholds field.
   b. Press the Change field key.
   c. Highlight the first data field.
   d. Press the [Options] key, then select the threshold. If you select a constant threshold, you must also type the threshold value.
   e. Repeat for each data field.
   f. Press the Finished key.

3. Enter Custom Headings.

   a. Highlight the Custom Headings field.
   b. Press the [Edit field] key.
   c. Type the headings for the data fields.

Note: Align the headings with the data fields. You may need to use more than one line to enter the heading.

   d. Press the [End Editing] key.

4. Save the quadrant.

   a. Press the [Commands] key.
   b. Select Save as a new personal quadrant.
   c. Select Exit (without saving changes).

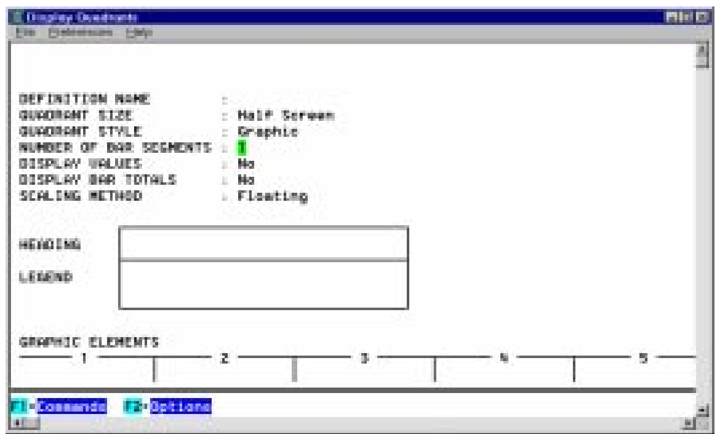
Note: CC MIS allows you to save multiple quadrant definitions with the same name. If you are modifying an existing quadrant definition, save the modification by using the Overwrite an existing quadrant command to prevent the system from saving different definitions with the same name.

Defining a graphic quadrant

Define graphic quadrants through the Quadrant Definition screen.

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

Figure 19.2 Display Quadrant screen for a graphic quadrant



Graphic quadrant screen fields and descriptions

Table 19-2: Display quadrant (graphic) field descriptions

Definition Name	Enter a name for the definition. The name identifies the definition in menus of defined quadrants and should be unique and can be up to 40 characters in length.
Quadrant Size	Choose either half screen or full screen using the [Options] function key.
Quadrant Style	Choose Graphic using the [Options] function key.
Number of bar Segments	This field determines the number of bar segments and graphic elements that appear in the screen. Choose between 1-5 bars.
Display Values	Choosing Yes displays data values in each bar segment. Choosing No displays bar segments only.

Table 19-2: Display quadrant (graphic) field descriptions

Display Bar Totals	Choosing Yes displays TOTAL at the end of all bars. Choosing No does not display totals.
Scaling Method	This field defines how the bars are scaled.
Floating	The floating method causes the highest bar total drawn to take up all available quadrant width. Other bars are scaled to this maximum. Use this method whenever the total value is relatively static over time.
Fixed	The fixed method causes all bars to be scaled to a fixed value. "AT" appears to the right of this field. Set this value. Use this method when the statistics vary widely over time but rarely exceed a maximum value.
Stepped	The stepped method causes all of the groups in a current view to be scanned for one with the maximum bar total. ``BY" appears to the right of this field. Bars will be scaled to a multiple of this value. Use this method when the statistics fluctuate widely over time.
Heading	This field allows you to specify a one-line heading that appears at the top of the graphic quadrant. If you do not choose a heading, then the system automatically adjusts the screen area.
Legends	This field is optional; it allows you to modify legend Text by using the function keys. Use up to two lines of Text per bar segment. Position the cursor in the graphic elements to edit the legend.
Graphic Elements	Accesses a menu of predefined formulas. Select the [Options] key to access predefined formulas. Choose a formula and its name appears in the field. Choose color schemes for legend Text.

Defining a graphic quadrant

Define graphic quadrants through the Quadrant Definition screen, as described in the steps below.

Step 19-2: Defining a graphic quadrant

1. From the main window, select Displays / Quadrants.
2. Enter the Definition Name.
3. Specify a Quadrant Size (Half Screen or Full Screen).
4. Specify a Quadrant Style (Tabular or Graphic).
5. Specify the Number of Bar Segments.(value between 1-5)
6. Specify whether or not to display values (yes/no).
7. Specify whether or not to display Bar Totals (yes/no).
8. Specify one of the following for the scaling method: Fixed, Floating, or Stepped.
9. If desired, in the Heading field, enter a one-line heading.
10. Modify the legend text using the function keys.
11. Select the formulas and color schemes using the [Options] key for the Graphic Elements fields.
12. Save the quadrant.
    a. Press the [Commands] key.
    b. Select Save as a new personal quadrant.

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

13. When finished, exit the screen by selecting the Exit option from the File menu.

Creating a public quadrant

When you save a quadrant, you have the option of saving it as a public quadrant. Public quadrants are available to all supervisors who have Display Options, Public Definitions or Personal Definitions enabled for their privilege level. There can be up to 250 public quadrants in CC MIS.

Defining a screen

By defining the screen, you determine the location of one or more quadrants to be displayed at one time. The name you give the screen is the name you use to select the screen in order to view it.

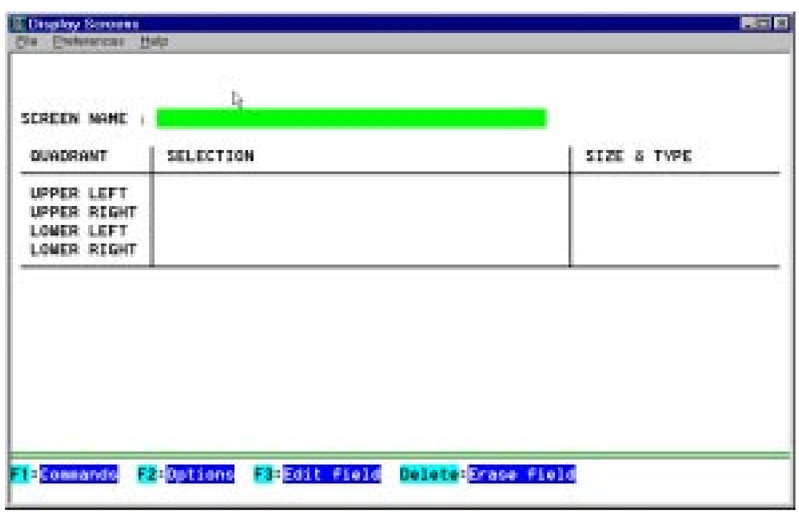
The following rules apply to placing quadrants on a screen:

- A full screen quadrant can only be placed in either the upper or lower left areas of the screen.
- A lower screen quadrant can only be defined if a quadrant is placed above it. If there is only an upper quadrant defined, the system automatically extends the display to the bottom of the screen.

Define screens through Display Screens.

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

Figure 19.3 Screen Definition display



Screen definition fields and descriptions

Table 19-3: Display screen definition field descriptions

(Language)	Used to specify the language in which the screen name is entered. This field only displays on multilingual systems.
Screen Name	Choose a name that best describes the custom real-time display.
Selection	Choose a quadrant definition that is to be displayed at the locations listed on the screen. The [Options] key provides a list of available quadrant definitions.
Size & Type	This field is automatically filled with parameters associated to the quadrant that you selected.

Step 19-3: Defining a screen

1. Define the screen.

a. From the main menu, select Displays / Screens.
b. Enter the Screen Name.
c. Highlight the upper left Selection field. Press the [Options] key to select the quadrant. Repeat this step for each quadrant to include in the screen.
d. Press the [Commands] key, and select Save as a Personal Screen.
e. Select Exit (without saving changes).

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

2. To view the display.

a. From the Queue Statistics Display, select View / New Display format
b. At the New Display Format? box, select the screen.
c. Click on ok.

Using a screen definition as a template

Once a screen definition has been saved, you can use it as a template to create new screens. To read an existing screen definition, access Screen Definition (Text) or Display/Screens (Windows). Use the [Commands] key to display and select the Read an existing screen definition option. At the Read which definition? pop-up, scroll through the options and highlight the definition you wish to use. Make any necessary changes and use the [Commands] key to save it as a new definition.

Creating a public screen

When you save a screen definition, you have the option of saving it as a public screen. Public screen definitions are available to all supervisors who have the Display Options, Public Formats enabled in their privilege level. There can be up to 250 public screens in CC MIS.

Note: Public screen definition may not reference personal display formats.

Creating a personal screen

When you save a screen definition, you have the option of saving it as a personal screen available only to you. Likewise, if another system administrator or a supervisor created a personal screen, you would not be able to access it. There can be up to five personal screen definitions per administrator.

Accessing custom displays

Once a custom display has been defined, it can be accessed through the Queue Statistics Display.

Use the steps below to access a custom display.

Step 19-4: Accessing custom displays

1. Access the Queue Statistics Display.

2. Select View /New Display Format.

The system displays the New Display Format? pop-up.

3. Highlight the custom format you desire. Remember, standard formats have RED icons, public formats have YELLOW icons, and personal formats have GREEN icons.

The system displays the customized Queue Statistics Display.

Customizing colors

System administrators set the system defaults for the colors for screen data elements. If color customization is enabled for a supervisor, the supervisor can change the colors for their personal use. If color customization is disabled for a supervisor, the supervisor can only use the system default colors.

Setting system default colors using the Text package

At the main menu, press the [Change colors] key. The system displays the Screen Color Definition screen. Use the arrow keys to move the cursor to the name of the screen element you wish to change. Move the cursor to the background column and enter the number of the color you want. Then, move the cursor to the foreground column and enter the number of the color you want. Use the [Commands] key to test and save the color settings.

Setting system default colors using the Windows package

At the main menu, select Profile / Colors. Identify the screen element you wish to change and select its foreground and background color. Use the window buttons to save your changes as the default.

Part Three

Appendices

Appendix A: System database reports

Introduction

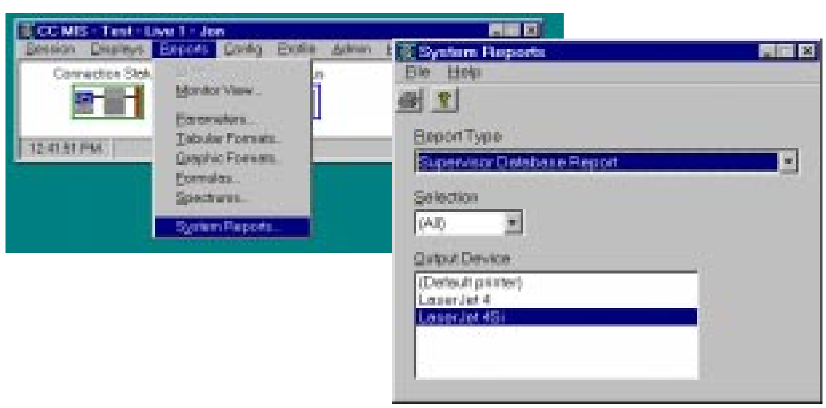
System Reports provide information describing the current state of the CC MIS customer configuration including information defined through Parameter Administration and Customer Configuration.

In general, a report containing Parameter Administration or Customer Configuration data is a replica of the corresponding screen on which the data is entered. The Configuration Report also contains configuration data received from the switch as well as configuration data modified through Configuration Control. Further detail on this data may be obtained from the MSL-100 ACD-MIS Interface Specification.

Printing

To print a system report, select the Reports/System Reports option from the Main window.

The System Reports window is displayed. Select the type of report and printer. Click on the Print button or select the File/Print option.



These reports are available at any time through the System Reports menu item on the supervisors main menu screen. They can be printed but not previewed, and they cannot be modified through Report Definition.

Configuration Report

This report provides load management information which is obtained from the switch as well as load management information modified through the Configuration Control facility. There are four components of this report. The first component contains information regarding ACD groups and the agent positions and supervisors within the group including an indication as to whether the position is currently staffed or unstaffed (spare).

The information is obtained from the switch and may be modified through the “Change Position Assignments” command of Configuration Control. An example report follows:

Figure A.1 Configuration Rpt - Group/Supervisor/Position assignments

CONFIGURATION REPORT PAGE 1
GROUP/SUPERVISOR/POSITION ASSIGNMENTS

Northern Telecom Date: 11/02/89 Time: 17:38

ACD GROUP	SPV-ID	AGENT POSN	STATUS	AGENT VARIABLE WRAP-UP TIME
Service	3702	3702	SPARE	0
	3702	3703	SPARE	0
Sales	3700	3701	STAFFED	*
Reservations	3700	3700	SPARE	100
	3710	3710	SPARE	100
Inquiries	3710	3709	STAFFED	20

The second component of the Configuration Report contains load management information regarding the ACD groups including primary and supplementary DNs, group names, and trunk and line priorities. This information is obtained from the switch and may be modified through the “Change ACD-DN Assignments & Priorities” command of Configuration Control. An example report follows:

Figure A.2 Configuration Report - ACD Directory Numbers

CONFIGURATION REPORT PAGE 1
ACD DIRECTORY NUMBERS

Northern Telecom Date: 11/02/89 Time: 17:38

ACD GROUP	ACD-DN	-PRIORITY-- LINE	TRUNK	ACD-DN NAME
Sales	214-997-1000	0	0	Main Sales
	214-997-1001	0		Special Sales
Service	214-997-2000	1	1	Service

The first line for each group shows the primary DN, line/trunk priorities, and ACD-DN name for the group. Subsequent lines for the same group provide information for the supplementary DNs.

The third component of the Configuration Report contains load management information for each group regarding queue sizes, thresholds, routing information, and other miscellaneous parameters. This information is obtained from the switch and may be modified through Configuration Control. An example report follows:

Figure A.3 .Configuration Report - ACD Group Parameters

```
                         CONFIGURATION REPORT                        PAGE 1
                         ACD GROUP PARAMETERS

Northern Telecom                                    Date: 11/02/89  Time: 17:38

ACD GROUP        GROUP PARAMETERS

Sales            Overflow Targets:  1. SERVICE       2: INQUIRIES
                                    3. RESERVATIONS  4. PROMOTIONS

                 Maximum Call Queue Limit............  300 calls
                 Maximum Call Queue Size.............  200 calls
                 Maximum Call Transfer Queue Size....   20 calls
                 Maximum Overflow In Queue Limit.....  300 calls
                 Maximum Overflow In Size............   50 calls
                 Maximum Wait Threshold..............  120 seconds
                 Recorded Announcement Threshold.....    0 seconds
                 Priority Promotion Timer............   60 seconds
                 Service Rate........................   50 seconds
                 Variable Wrap-Up Time...............   15 seconds
                 Time Delay Threshold................  600 seconds
                 Time Delay Threshold Time...........   60 seconds
                 Audio Group.........................    1
                 Night Service Audio Group...........    1
                 Number of display digits............    7
                 Consider Source Group...............  yes
                 Forced Incoming Audio Group.........    2
                 Forced Overflow Audio Group.........    2
                 Original Group Provides Announcement   no
                 Preference Weighting Factor.........  200
                 Resource Index......................  200
                 Time Delay Threshold Route.......... OFRT      0
                 Threshold Route..................... OFRT      0
                 Night Service Route................. OFRT      0
                 Controlled Interflow Route.......... OFRT      0
                 Multi-Stage Queue Threshold Type.... Queue Size
                 Multi-Stage Queue Thresholds........    20    30    40
                 Overflow Type....................... Priority 0 only
                 Start Timer......................... At Priority 0
                 Call Service Order: Outflow, call queues, inflow
```

Meanings for each of the above data items may be found in: *MDC Customer Data Schema* (NTP 297-2001-451), *Meridian SL-100 ACD General Description* (NTP 555-4101-100), *Meridian SL-100 ACD Load Management* (NTP 555-4101-102), and *Meridian SL-100 Network ACD General Description* (NTP 555-8101-100).

The fourth component of the report contains load management information regarding the networking targets used for Network ACD. This information is obtained from the switch and may be modified through Configuration Control. An example report follows:

Figure A.4 Configuration Report - ACD Network Targets

CONFIGURATION REPORT
ACD NETWORK TARGETS

PAGE 1

Northern Telecom

Date: 11/02/89 Time: 17:38

ACD GROUP	ACD NETWORK TARGETS					
	Destination ACD-DN	PWF	RI	Destination ACD-DN	PWF	RI
Sales	214-498-7276	20	40	214-907-7030	25	30
	214-517-6032	20	40	214-907-7031	25	30
	214-517-6033	20	40	214-907-7032	25	30
	214-517-6034	20	40	214-907-7033	25	30
	214-517-6035	20	40	214-907-7034	25	30
	214-517-6036	20	40	214-907-7035	25	30
	214-517-6037	20	40	214-907-7036	25	30
	214-517-6038	20	40	214-907-7037	25	30
	214-517-6039	20	40	214-907-7038	25	30
	214-517-6040	20	40	214-907-7039	25	30
	214-517-6041	20	40	214-907-7040	25	30
	214-517-6042	20	40	214-907-7041	25	30
	214-517-6043	20	40	214-907-7042	25	30
	214-517-6044	20	40	214-907-7043	25	30
	214-517-6045	20	40	214-907-7044	25	30
	214-517-6046	20	40	214-907-7045	25	30
	214-517-6047	20	40	214-907-7046	25	30
	214-517-6048	20	40	214-907-7047	25	30
	214-517-6049	20	40	214-907-7048	25	30
	214-517-6050	20	40	214-907-7049	25	30
	214-517-6051	20	40	214-907-7050	25	30
	214-517-6052	20	40	214-907-7051	25	30
	214-517-6053	20	40	214-907-7052	25	30
	214-517-6054	20	40	214-907-7053	25	30

Supervisor Database Report

The Supervisor Database Report provides information which has been entered through the Supervisor Definition portion of Parameter Administration. An example report follows:

Figure A.5 Supervisor Database Report

```
                              SUPERVISOR DATABASE REPORT                        Page 1

Northern Telecom                                               Date: 10/02/95  Time: 11:27

==========================================================================================
LOGIN ID:  11                NAME: Steve Public
------------------------------------------------------------------------------------------
PRIVILEGE LEVEL              : System Administrator
SCOPE RESTRICTION            : Global

ACD GROUP NAMES              : YES              TABULAR PRINTER       : RuggedWriter
EMERGENCY INDICATOR          : YES              GRAPHIC PRINTER       : LaserJet
AUDIBLE ALARM                : NO               LOCAL PRINTER OVERRIDE : YES

DEFAULT QUEUE DISPLAY        : Standard Tabular Queue Display
DEFAULT VIEW                 : LIMITED
DEFAULT GROUP LIST           : (NONE)
VIEW LIST ITEMS ONLY         : NO
UPDATE RATE                  : 10
SUBGROUP ID                  : 0100

==========================================================================================
LOGIN ID: 14                 NAME: Jon Smith
------------------------------------------------------------------------------------------
PRIVILEGE LEVEL              : Level 1 Supervisor
SCOPE RESTRICTION            : Sales Dept.
SUBGROUP ID                  : 0100

ACD GROUP NAMES              : YES              TABULAR PRINTER       : RuggedWriter
EMERGENCY INDICATOR          : NO               GRAPHIC PRINTER       : LaserJet
AUDIBLE ALARM                : NO               LOCAL PRINTER OVERRIDE : YES

DEFAULT QUEUE DISPLAY        : Standard Tabular Queue Display
DEFAULT VIEW                 : LIMITED
DEFAULT GROUP LIST           : (NONE)
VIEW LIST ITEMS ONLY         : NO
UPDATE RATE                  : 10
SUBGROUP ID                  : 0100
```

Privilege Level Database Report

The Privilege Level Database Report provides information which has been entered through the Privilege Level Definition portion of Parameter Administration. An example report follows:

Figure A.6 Privilege Level Database Report

```
                           PRIVILEGE LEVEL DATABASE REPORT                Page  1

Northern Telecom                                      Date: 12/02/92  Time: 11:27

================================================================================
Level 1 Supervisor
--------------------------------------------------------------------------------
DISPLAY OPTIONS           CONFIG CONTROL OPTIONS        ADMINISTRATION OPTIONS
  DISPLAYS..........YES     BASIC.................YES     SUPERVISORS/PRIVS..NO
  PERSONAL FORMATS..YES     POSITION REASSIGNS....YES     SCOPES.............NO
  PUBLIC FORMATS....NO      AGENT SET PARAMS......NO      DEFAULT COLORS.....NO
  FORMULAS..........NO      QUEUE SIZES...........NO      TIME FRAMES........NO
  WALLBOARDS........NO      TIME OVERFLOW.........NO      THRESHOLDS.........NO
  ALARMS.......   ..NO      OVERFLOW TARGETS......NO      ACD GROUPS.........NO
  GLOBAL VIEW.......NO      ANNOUNCEMENTS.........NO      AGENTS.............NO
  MONITOR...........YES     SPECIAL ROUTING.......NO      WALKAWAY CODES.....NO
                            NETWORK PARAMS........NO      LOB CODES..........NO
REPORT OPTIONS              ACD-DN REASSIGNS......NO      SCHEDULES..........NO
  PERSONAL REPORTS..YES     NETWORK TARGETS.......NO      LISTS..............NO
  PUBLIC REPORTS....NO      CHANGE ORDERS.........NO      CUSTOMER OPTIONS...NO
  PERSONAL FORMATS..YES
  PUBLIC FORMATS....NO
  FORMULAS..........NO
  SPECTRUMS.........NO    SUPERVISOR OPTIONS
  SYSTEM REPORTS....NO      PROFILE...............YES
  GLOBAL VIEW.......NO      COLORS................YES
  MONITOR...........YES
```

Scope Database Report

The Scope Database Report provides information which has been entered through the Scope Definition portion of Parameter Administration. An example report follows:

Figure A.7 Scope Database Report

```
                              SCOPE DATABASE REPORT                    Page  1

Northern Telecom                                        Date: 12/02/92  Time: 11:27

===============================================================================
Sales Dept
-------------------------------------------------------------------------------
ACD GROUPS: nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn
            nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn
            nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn
            nnn-nnn-nnnn  nnn-nnn-nnnn

SUBGROUPS : nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn
            nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn
            nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn


===============================================================================
Service Dept
-------------------------------------------------------------------------------
ACD GROUPS: nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn
            nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn  nnn-nnn-nnnn
            nnn-nnn-nnnn

SUBGROUPS : nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn
            nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn nnnn


    etc...
```

Agent Database Report

The Agent Database Report provides information which has been entered through the Agent Definition portion of Parameter Administration. This report will vary depending on whether the user partition has APR enabled or disabled. The following is an example report with APR disabled:

Figure A.8 Agent Database Report without APR

```
                         AGENT DATABASE REPORT                    PAGE 1

Northern Telecom                                  Date: 11/02/89  Time: 17:38

AGENT     AGENT NAME        EMPLOYEE ID      MISCELLANEOUS

    1     Smith             12345678901234   John Q. Smith
    2     Bush                               George
    3     Jones                              Joyce Jones
    4     White                              Mark
    5     Doe                                Jane Doe
   10     Hall                               Mike Hall
   11     Fry                                Dee
   12     Bols                               Nasser
```

The following is an example report with APR enabled:

Figure A.9 Agent Database Report with APR

```
                         AGENT DATABASE REPORT                    PAGE 1

Northern Telecom                                  Date: 11/02/89  Time: 17:38

                                         ----APR-----
AGENT     AGENT NAME  EMPLOYEE ID SUBGRP    ON    MISCELLANEOUS

    1     Smith     12345678901234  1111    YES    John Q. Smith
    2     Bush                              NO     George
    3     Jones                             NO     Joyce Jones
    4     White                             NO     Mark
    5     Doe                               NO     Jane Doe
   10     Hall                              NO     Mike Hall
   11     Fry                               NO     Dee
   12     Bols                              NO     Nasser
```

ACD-GRP Database Report

The ACD-GRP Database Report provides information which has been entered through the ACD-GRP Definition portion of Parameter Administration. The following is an example report:

Figure A.10 ACD-GRP Database Report

ACD-GRP DATABASE REPORT PAGE 1

Northern Telecom Date: 11/02/89 Time: 17:38

PRIMARY ACD-DN	ACD-GRP NAME	THRESHOLD NUMBER	LOGICAL GROUP
214-555-2885	Service	1	Sales
214-555-2888	Sales	1	Sales
214-555-2890	Reservations	1	Information
214-555-2891	Inquiries	1	Information
214-555-2896	Promotions	1	

Threshold Definition Database Report

The Threshold Definition Database Report provides information which has been entered through the Threshold Definition portion of Parameter Administration. An example report follows:

Figure A.11 Threshold Definition Database Report

```
                    THRESHOLD DATABASE REPORT                    PAGE 1

Northern Telecom                                    Date: 11/02/89  Time: 17:38

THRESHOLD #  AGENT THRESHOLDS          QUEUE STATISTICS THRESHOLDS
--------------------------------------------------------------------------

    1        ACD TALK...    11  Delay Objective...    16   UD1> Agts Rqd  100
             Not Ready..    12  Service Objective.    17   UD2>
             Wait.......    13  Avg. Answer Delay.    18   UD3>
             DN In  ....    14  Calls Waiting.....    19   UD4>
             DN Out.....    15  Short Call........    20   UD5>
             Walkaway...    16  DN IN Short Call..    32
             Hold.......    17  DN Out Short Call.    32

    2        ACD TALK...    21  Delay Objective...    26   UD1> Agts Rqd  100
             Not Ready..    22  Service Objective.    27   UD2>
             Wait.......    23  Avg. Answer Delay.    28   UD3>
             DN In  ....    24  Calls Waiting.....    29   UD4>
             DN Out........25  Short Call........    30   UD5>
             Walkaway...    26  DN IN Short Call..    32
             Hold.......    27  DN Out Short Call.    32

    5        ACD TALK...    31  Delay Objective...    36   UD1> Agts Rqd  100
             Not Ready..    32  Service Objective.    37   UD2>
             Wait.......    33  Avg. Answer Delay.    38   UD3>
             DN In  ....    34  Calls Waiting.....    39   UD4>
             DN Out........35  Short Call........    40   UD5>
             Walkaway...    36  DN IN Short Call..    32
             Hold.......    37  DN Out Short Call.    32
```

Shift Definition Database Report

The Shift Definition Database Report provides the information regarding shifts which has been entered through the Time Frames Definition portion of Parameter Administration. An example report follows:

Figure A.12 Shift Definition Database Report

```
                SHIFT DATABASE REPORT                         PAGE 1

Northern Telecom                            Date: 11/02/89  Time: 17:38

SHIFT      SHIFT NAME         SHIFT START TIME

  1        Morning                 00:00
  2        Day                     08:00
  3        Evening                 16:00
```

Period Definition Database Report

The Period Definition Database Report provides the information regarding periods which has been entered through the Time Frames Definition portion of Parameter Administration. An example report follows:

Figure A.13 Period Definition Database Report

```
                    PERIOD DATABASE REPORT                         PAGE 1

Northern Telecom                                   Date: 11/02/89  Time: 17:38

PERIOD     PERIOD NAME            START DATE (MM/DD)

   1       January                   1/01
   2       February                  2/01
   3       March                     3/01
   4       April                     4/01
   5       May                       5/01
   6       June                      6/01
   7       July                      7/01
   8       August                    8/01
   9       September                 9/01
  10       October                  10/01
  11       November                 11/01
  12       December                 12/01

           End date of last period: 12/31
```

Logical Group Database Report

The Logical Group Database Report provides the information regarding logical groups which has been entered through the ACD-GRP Definition portion of Parameter Administration. This information is also available on the ACD-GRP Database Report. On this report, however, the information is presented in logical group order. An example report follows:

Figure A.14 Logical Group Database Report

```
                        LOGICAL GROUP REPORT                      PAGE 1

Northern Telecom                                Date: 11/02/89  Time: 17:38

LOGICAL GROUP NAME      LOGICAL GROUP ELEMENTS

Sales                   Sales
                        214-555-2888

Information             Service
                        Complaints
```

Walkaway Code Database Report

The Walkaway Code Database Report provides the information regarding logical groups which has been entered through the Walkaway Code Definition portion of Parameter Administration. An example report follows:

Figure A.15 Walkaway Code Database Report

```
                    WALKAWAY CODE DATABASE REPORT                           PAGE 1

Northern Telecom                                    Date: 11/02/89  Time: 17:38

WALKAWAY CODE      WALKAWAY REASON     CODE DESCRIPTOR    WALK EVENT

  211                 Lunch               LCH                Yes
  221                 Break               BRK                Yes
  231                 Assistance          AST                No
```

Line of Business Code Database Report

The Line of Business Code Database Report provides the information regarding logical groups which has been entered through the Line of Business Code Definition portion of Parameter Administration. An example report follows:

Figure A.16 Line of Business Code Database Report

```
                        LOB DATABASE REPORT                          PAGE 1

Northern Telecom                                 Date: 11/02/89  Time: 17:38

  LOB           LOB Code Name

  111          Product Assistance
  121          Complaints
  125          Sales
```

ACD-DN Database Report

The ACD-DN Database Report provides the information regarding ACD-DNs which has been entered through the ACD-DN Definition portion of Parameter Administration. An example report follows:

Figure A.17 ACD-DN Database Report

```
                           ACD-DN DATABASE REPORT                  Page 1

Northern Telecom                                   Date: 11/02/89  Time: 17:38

ACD-DN                ACD-DN NAME

 214-555-2885         Service Priority
 214-555-2888         Sales Priority
 214-555-2890         Special Deal
 214-555-2891         Holiday Promo
 214-555-2896         Priority Cust.
```

Alarm Definition Database Report

The Alarm Definition Database Report provides the information concerning the defined alarms. An example report follows:

Figure A.18 Alarm Definition Database Report

```
                            ALARM DATABASE REPORT                     Page    1

Nortel                                           Date: 02/09/96  Time: 10:47

================================================================================
ALARM ID:   1        NAME: Service Level Alarm
--------------------------------------------------------------------------------
FORMULA    : Telephone service level
THRESHOLD  : Below      Service Objective            PLUS  : 0
ALARM TYPE : Major      GROUPS : Good Service        DELAY : 5

================================================================================
ALARM ID:   5        NAME: Force Outs
--------------------------------------------------------------------------------
FORMULA    : Number of positions in FORCED state
THRESHOLD  : Above      (Zero)                       PLUS  : 1
ALARM TYPE : Minor      GROUPS : (All)               DELAY : 10

================================================================================
ALARM ID:  30        NAME: Calls Waiting Alarm
--------------------------------------------------------------------------------
FORMULA    : Number of physical calls queued
THRESHOLD  : Above      Calls Waiting                PLUS  : 3
ALARM TYPE : Minor      GROUPS : (All)               DELAY : 10

================================================================================
ALARM ID:  55        NAME: Excessive Caller Delay
--------------------------------------------------------------------------------
FORMULA    : Wait time of oldest physical call
THRESHOLD  : Above      (Zero)                       PLUS  : 120
ALARM TYPE : Major      GROUPS : (All)               DELAY : 10

================================================================================
ALARM ID:  99        NAME: ARU Failure Alarm
--------------------------------------------------------------------------------
FORMULA    : Number of positions in NRDY state
THRESHOLD  : Above      (Zero)                       PLUS  : 10
ALARM TYPE : Critical   GROUPS : ARU Groups          DELAY : 5

================================================================================
ALARM ID: 100        NAME: Excessive Traffic
--------------------------------------------------------------------------------
FORMULA    : Number of calls answered
THRESHOLD  : Above      (Zero)                       PLUS  : 600
ALARM TYPE : Poll       GROUPS : (All)               DELAY : 10
```

Schedule Definition Database Report

The Schedule Definition Database Report provides the information concerning the defined schedules in the database. An example report follows:

Figure A.19 Schedule Definition Database Report

```
                    SCHEDULE DEFINITION REPORT

Northern Telecom                                Date: 04/19/96 Time: 09:48
==========================================================================
SCHEDULE NAME: jayr1
--------------------------------------------------------------------------
DATE SELECTIONS              TIME SELECTIONS
Date: 4/15                   End of each interval ;
Start of each week :         End of each shift :
Start of Each period:

Every Monday      :x
Every Tuesday     :x
Every Wednesday   :x
Every Thursday    :x
Every Friday      :x
Every Saturday    :x
Every Sunday      :x

Times in schedule :

Time Restrictions:
```

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