User Guide for TASKE Contact Web Interface

For Toshiba® Strata CIX Telephone Systems

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TASKE® TECHNOLOGY

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Chapter 1 Welcome

This guide is intended to provide information about how to use the TASKE web interface to your call center.

Sign In and Sign Out of the Web Interface

To access the web interface, you provide your user name and password on the **Sign In** page that appears when you access the web interface. These unique credentials ensure that only you have access to your web interface. If you do not have a user name or password, contact your system administrator. You can change your password (p. 11) at any time.

The first time that you sign in to the web interface, the Welcome page prompts you to select the resources that you most frequently want to monitor in real-time. These selections are used to populate the web interface. You can always add resources that you did not select on the Welcome page at a later time. For a step-by-step guide to selecting resources from the Welcome page and how these selections are used, see “Getting Started Quick Tour” (p. 4).

Sign Out of the Web Interface

When you are finished working in the web interface, you can simply close the web browser. You are automatically signed out of the service. However, the license does not become available for use by another user for another 15 minutes, by default.

It is a good practice to sign out by clicking the **Sign out** link in the top, right-hand corner of the web page. Using this link makes the license available to another user immediately.

Chapter 2 Understanding the Web Interface

The main sections of the web interface include:

- Banner
- Navigation Bar
- Index Pane
- Content Pane

For Enterprise sites, areas of the web interface include additional identifiers to help you distinguish local and remote sites. For information about whether the site you are working in is licensed for enterprise, contact your system administrator.

Banner

The Banner spans the top of the web interface and includes:

- **webSign** is a scrolling ticker that displays real-time queue/group statistics.
- **Chat** is a link that opens the Chat interface that you can use to chat with other TASKE users who are signed in to the web interface.
- **Preferences** is a link that provides options for customizing the web interface.
- **Sign out** is a link that ends your current web interface session.
- **Help** is a link that opens the online Help.

Navigation Bar

The **Navigation Bar** displays a button for each area of the web interface, which you click to access each area, and a Configuration Bar.

- **Home** collects all the content other areas of the web interface that you want to keep an eye on, and updates the data in real-time. This section is most useful for the content for which you want to stay up-to-date on a daily basis. The Home page lets you monitor, on a single page, sections of interest from the Real-Time and Review areas.
- **Real-Time** lets you know what is happening in your contact center now. This section displays statistics about its resources to help you determine their current status.
- **Review** shows summary performance information for the current day, the last hour, the last 12 hours or the last 24 hours for queues, queue groups, agents and agent groups.
- **Replay** shows significant events for any day with logged data. Select a replay date, set your triggers, and start the replay to begin scanning the stored telephone system data for that day.
- **Reports** produce reports that summarize telephone system information, providing important performance information for the time period of your choice. Customize the display to highlight key information and view data in both tabular and graphical formats.
- **Visualizer** searches for call records matching criteria you specify. Visualizer uses the natural language filtering system to let you create filters based on dates, times, call types and activity, call information (such as telephone numbers), and trunk or extension participation.

- **Configuration Bar** If the current area provides options for configuration, links are located directly below the navigation bar. For example, the Home page provides links for changing content, changing the layout, and changing preferences.

Index Pane and Content Pane

The Index Pane displays a list of the pages that you can select to view in the content pane.

The Content Pane displays the page selected from the index pane. The content pane generally consists of several sub-sections that present information in various formats. A section banner divides the content pane into sections, if appropriate, and may include buttons for working with the content in that section.

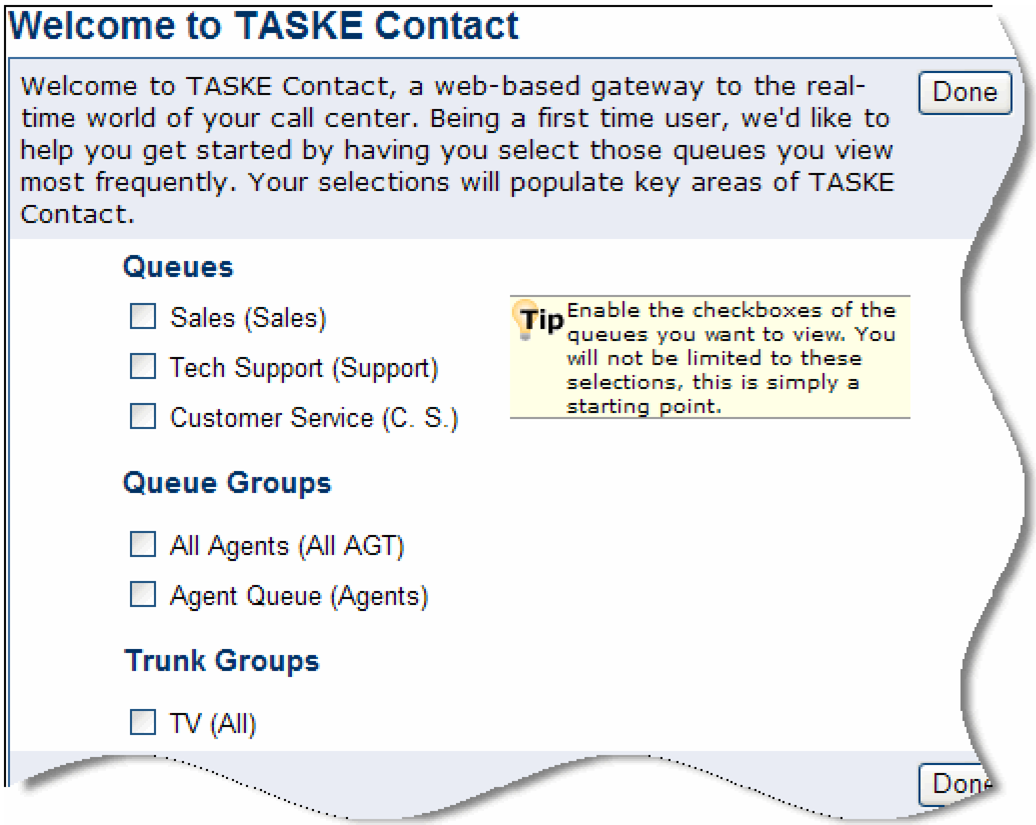
The Web Interface for Enterprise Sites

Enterprise is a term used to describe the sharing of data among multiple TASKE sites through a wide area network (WAN). For sites that are licensed for enterprise, origins of statistics are identified in various sections of the web interface. For example, in the Real-Time area, the index pane displays each active site name in bold text. The resources belonging to a site are displayed in an indented list below the site name. Similarly, the section banner for each resource includes the site name, along with the name and nickname of the resource.

Chapter 3 Getting Started Quick Tour

This Quick Tour will help you get started using the TASKE web interface.

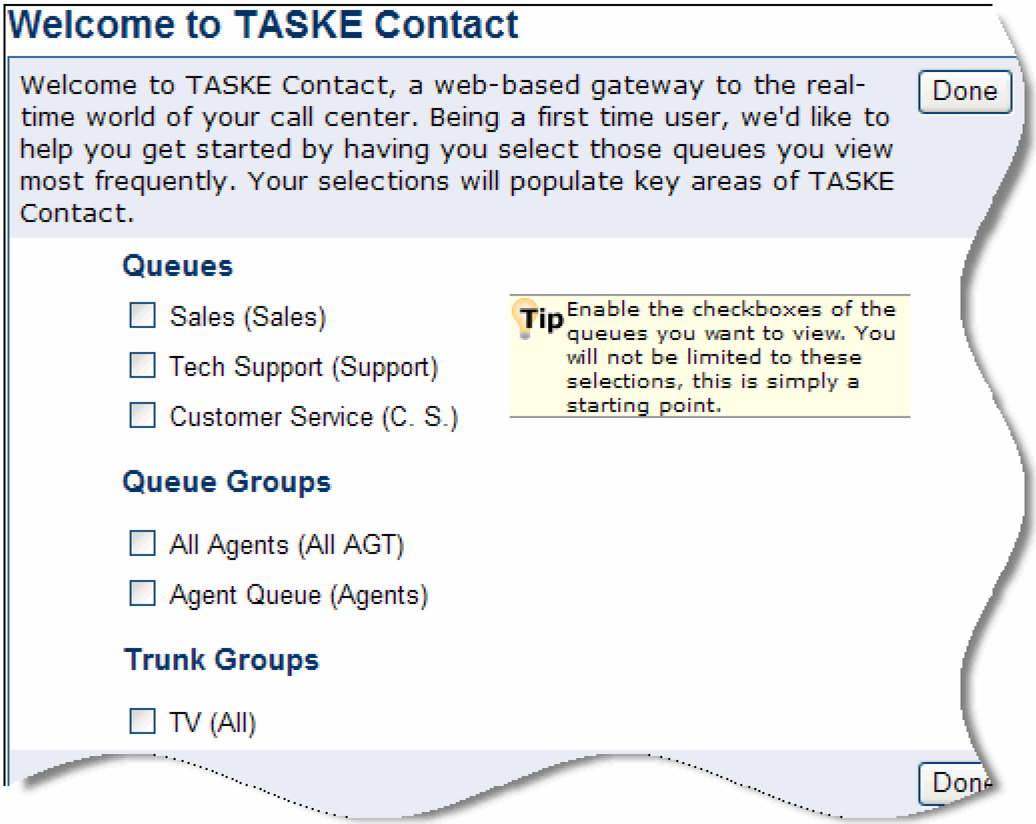
To follow along with this Quick Tour, you must be logged into the TASKE web interface for the first time and viewing the Welcome page on your screen. Here is an example of a Welcome page:



If you do not want to follow along with this Quick Tour, you can simply read the following pages for a preview of how to get started using the TASKE web interface.

Choosing Resources from the Welcome Page

The Welcome page is a tool to help you get started quickly. This page shows all the queues, queue groups, and trunk groups that are available to you.



From this page, you select resources that will be added to the following key areas of the TASKE web interface:

- My Home page
- My Resources page in the Real-Time area
- Summary Performance Indicators section of the My Call Center page in the Review area
- webSign statistics

Using your resource selections, the TASKE web interface also creates a default daily report.

You'll learn more about the Home page and some of these other areas in the remainder of this Quick Tour. For more detailed information, explore the other sections of this guide on your own after completing this Quick Tour.

Resources that you do not select on the Welcome page can be added to the web interface at a later time.

To make your selections on the Welcome page:

1. Select the check box for each resource you want used to populate the web interface. At least one selection is required.

   Here is an example of a selected check box:

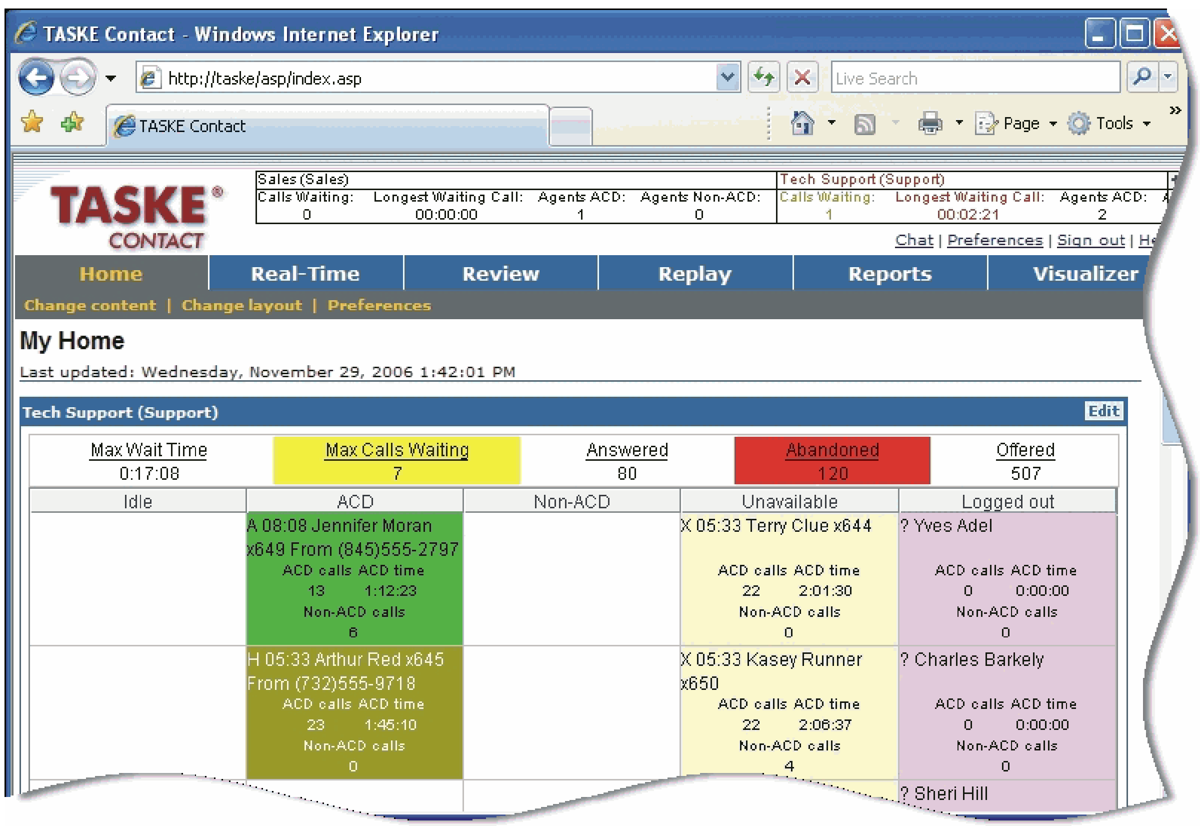
   

2. Click **Done**.

The Home page appears and is populated with your resource selections.

Home Page

After you select resources from the Welcome page, the Home page is displayed, showing information about the selected resources. In this example of a Home page, the Sales resource was a selection on the Welcome page. This resource is shown in the body of the My Home Page.



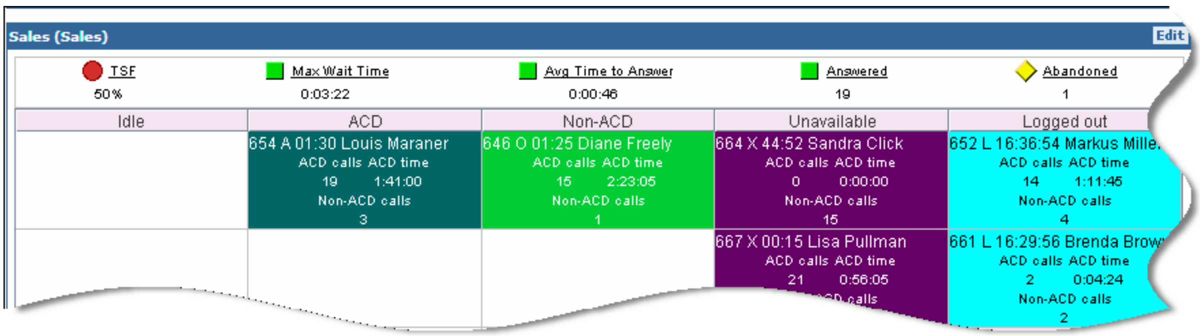
The Home page gives you one convenient location to view content that originates from other areas of the web interface. For example, assume that you want to monitor the status of a queue group named All Technical Support. You can view content for this resource on the Real-Time page and the Review pages, but you cannot see the content on both pages at the same time. A more convenient way to monitor this queue group is to include content from the Real-Time and Review pages on the Home page so that you can view all the content simultaneously.

Resources on the Home page are automatically added to the webSign shown at the top of this page. The webSign is a scrolling ticker that shows statistics about the resources you have selected. You can customize the speed of the webSign, among other preferences for the appearance and use the TASKE web interface. These preferences are described in the Preferences section of this guide.

Notice the square green indicators that appear in the Sales resource. These are performance indicators that provide a quick visual status of the resource's performance.

Performance Indicators

Performance indicators highlight whether a resource is meeting specified thresholds in the last one hour. In this example, three green performance indicators highlight that resources are meeting thresholds, one yellow performance indicator highlights that resources are operating marginally outside of an acceptable threshold, and one red performance indicator highlights that resources are operating critically outside of an acceptable threshold.

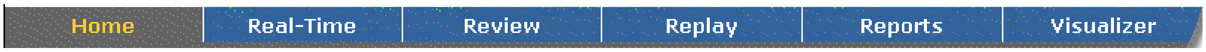


You set performance indicators in the Review (p. 28) section.

Navigating the TASKE Web Interface

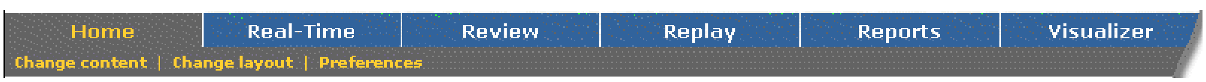
This Quick Tour showed you how to get started using the TASKE web interface by choosing resources on the Welcome page and monitoring resources on the Home page.

While the Home page is the area you will use most frequently, you may want to explore other areas of the web interface. You can click buttons on the navigation bar to access other areas of the web interface:



For example, click Real-Time to access current information about the status of agents for your queues and queue groups. Click Review to examine call center statistics for resources over the past 24-hour period. While you are browsing content on these other pages, you may decide you want to add content to the Home page. When you see the Add to Home page button, you can click it to quickly add the associated section to the Home page:

The three links below the navigation bar let you customize the content in the TASKE web interface.

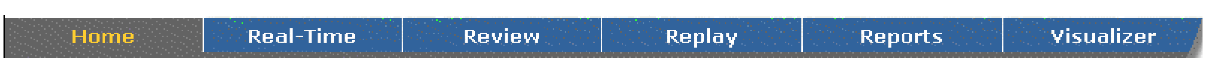


The Change content link lets you change the order that resources are listed on a page and the Change layout link lets you add or remove resources on a page.

The Preferences link lets you customize TASKE web interface options, such as the speed of the webSign or the color of various options. When you click this link, you will see preferences for the area that you are currently using, if available. For example, if you are on the Real-Time page, preferences for Real-Time options appear. If preferences are not available for the current area, you see the General preferences.

What's Next?

Now, you've learned how to get started using the TASKE web interface and some tips for finding your way around. Explore the web interface on your own, looking at each section, represented by the buttons on the navigation bar:



- **Home**

  Use this section to collect all the content that you want to keep an eye on. This section is most useful for the content for which you want to stay up-to-date on a daily basis.

- **Real-Time**

  When you need to know what is happening in the contact center now, this section gives you the statistics to determine the status of its resources.

- **Review**

  Look back on what has happened over a period in the past. For example, at the end of the day, review resource activity for the day.

- **Replay**

  When significant events have occurred, replay data to evaluate the activity that was occurring at that time. Replay gives you a way to go back in time and assess contact center activity related to events.

- **Reports**

  Reporting on activity is an important aspect of managing your contact center. Reports summarize call center activities for previous days, weeks, months or years.

- **Visualizer**

  Search for a specific event. Filtering on criteria including dates, times, call types and activity, and call information provides a powerful search facility for finding call records.

As you continue to explore the web interface, this guide will be useful for finding out how sections of the web interface relate to each other, which help you to design content in the web interface in a way that suits your work best. This guide is organized based on the sections of the web interface, represented by the buttons on the navigation bar. When you are working in an area of the web interface and want more information, simply go to the section in this guide with the name web interface area.

Chapter 4 Setting Your Password and Preferences

You can customize each area of the web interface to suit your preferences. For example, you can choose the colors used to represent resources in the web interface. Preferences also let you change the password used to log in to the TASKE web interface.

Preferences are organized as follows:

- **General**

  Change the default display attributes for performance indicators and change your web interface password.

- **Real-Time**

  Choose properties to display for resources, agent statistics, agent state colors, and trunk state colors in the Real-Time area.

- **webSign**

  Add statistics and set alarms, reorder statistics, and set appearance and sound options.

- **Reports**

  Select the global print, export, email, and scheduling options for reports.

- **Visualizer**

  Choose the state colors and timeline for call details, as well as the display options for search results.

- **Chat**

  Maintain your Chat contact list by adding or removing contacts. If the Chat link is not available on the Preferences page, contact your system administrator for information on enabling Chat.

To access the preferences:

1. Click the **Preferences** link in the banner.
2. Click the link that represents the preferences you want to access.

Some preferences are available directly from the area you are currently working in. If so, the Preferences link will also be available below the navigation bar.

Changing Your TASKE Web Interface Password

You can change your TASKE web interface password at any time. You must provide your current password and the new password. Passwords are case-sensitive and must be between 6 and 32 characters in length.

To change your password:

1. From the Preferences index pane, click **General**.
2. Click **Change Password**.
3. Type your current password in the **Enter your old password** box.
4. Type your new password in the **Enter a new password** box.
5. Confirm your new password by typing it in the **Confirm your new password** box.
6. Click **Save**.

If you typed any information incorrectly, you are prompted to retype the information.

Chapter 5 Home

The My Home page gives you one convenient location to monitor the resources that you are most interested in. As you browse other pages in the web interface, you can add content from those pages to the My Home page with a click of a button. The content remains on the original page. Only a copy is added to the My Home page.

For example, assume that you want to monitor the status of a queue group named All Technical Support. You can view content for this resource on the Real-Time page and the Review pages, but you cannot see the content on both pages at the same time. A more convenient way to monitor this queue group is to add content (represented by sections) from the Real-Time and Review pages to the My Home page. On this page, you can see sections from the Real-Time and Review pages simultaneously.

To the My Home page, you can add a copy of the following content from other pages:

- Resource section from the Real-Time area.

  By default, the My Home page includes a section showing real-time content for each resource that you chose on the Welcome page the first time you logged in to the web interface. If you did not choose a resource on the Welcome page, you can add its Real-Time section to the My Home page at any time.

- Review sections from pages in the Review area.

  Review sections depend on the resource type. For example, for a queue, you can add Overview and Answered Calls sections, among other sections. For an agent, you can add Overview and ACD Calls sections, among other sections.

For the queues and queue groups added to the My Home page by default, several summary statistics are displayed automatically. Summary statistics provide total values for queues and queue group activity over the last one hour. You can add other summary statistics and you can set up summary statistics to function as performance indicators.

You can add four other sections to the My Home page to give you a high-level status of the performance of your contact center. These sections include: Summary Performance Indicators, Notifications, Agent Summary, and Queue Summary.

Content on the My Home page is updated in real-time. For example, if you are monitoring the Real-Time status of a resource, you see current values. If you are monitoring Review content, you see cumulative values for the last 24-hour period.

As you add content to the My Home page, you may want to change its layout options, such as using a two-column layout or rearranging the order of sections.

Adding and Removing Real-Time and Review Area Sections

The My Home page includes one section for each resource that you selected on the Welcome page the first time you logged in to the web interface. This section shows the Real-Time content. If you look at the Real-Time page, you see that it contains the same sections.

You customize the My Home page by adding other sections that show different types of content for these resources. For example, for a queue, you can add a section that shows information about answered calls.

You can also customize the My Home page by adding sections for resources you did not select on the Welcome page.

Any section you add to the My Home page may be deleted.

Available sections depend on the resource type. For example, for a queue, you can add Real-Time and Answered Calls sections, among other sections. For an agent, you can add Real-Time and ACD Calls sections, among other sections. For information about the sections available for each resource, see “Sections for Agents and Agent Groups” (p. 69), “Sections for Queue and Queue Groups” (p. 71), and “Sections for Trunks and Trunk Groups” (p. 74).

Tip: If a section is already displayed on another page of the web interface, there is an easy way to add it to the My Home page. Go to the page on which the section appears, and click the Add button in the section banner, and click **OK**. If a section does not show this button, it cannot be added to the My Home page.

 Add button

The procedure you use to add a section depends on whether any sections for the resource are already on the My Home page.

To add a section for a resource that is not already on the My Home page:

1. From the My Home page, click the **Change content** link below the navigation bar.
2. Click the **Add section** link.

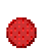
   The My Sections area lists the resources and sections that already appear on the My Home page.
3. For Enterprise sites, from the Site list, select the site that contains the section you want to add.
4. Click the resource type from the Resource type list.
5. Click the resource you want to add, and click **Continue**.
6. Select the check box for each section you want to display on the My Home page, and click **Save**.
7. Click **Done**.

To add or remove sections for a resource that is already on the My Home page:

1. From the My Home page, click the **Change content** link below the navigation bar.
2. Click the **Edit** link for the resource.
3. Select check boxes for sections you want to add to the My Home page and clear check boxes sections you want to remove from the My Home page.
4. Click **Save**, and click **Done**.

Adding Summary Performance Indicators

Summary performance indicators highlight when a resource has not met specified thresholds in the last one hour. For example, the following indicator shows that the All Support queue has not met specified thresholds in the last one hour:

 All Support (Support)

For information about the display options for performance indicators, including the colors that represent each indicator, see “Configuring Performance Indicators” (p. 17).

You can add a Summary Performance Indicators section to the My Home page and then add resources to this section. The status of the indicator for a resource is determined by the threshold value you set.

To add the Summary Performance Indicators section to the My Home page:

1. From the My Home page, click the **Change content** link below the navigation bar.
2. In the General section, select the **Summary performance indicators** check box.
3. Click **Done**.

To add resources to the Summary Performance Indicators section:

1. Click the **Edit** button for the Summary Performance Indicators section.
2. Click the **Edit** link for the resource type.
3. Select the check boxes for the resources for which you want to display summary performance indicators.
4. Click **Save**, and click **Done**.

To view the statistics that comprise the status of the indicator:

- Click the link for the resource name associated with a summary performance indicator.

To add statistics to an indicator or edit threshold values for existing statistics:

1. Click the link for the resource name associated with a summary performance indicator.

   You go to the Review page for the resource. Thresholds are set in the Review area.
2. In the Performance Indicators for Last Hour section, click the **Edit** button.
3. Do one of the following:
   - To add a new statistic, click **Add indicator**. Select the statistic from the list and type threshold values for one or both indicator types (Warning and Critical).
   - If a threshold has been set for this statistic, click the **Edit** link for the indicator. Edit the threshold values for one or both indicator types (Warning and Critical).

     For a definition of the statistics, see the glossary (p. 77).
4. Click **Save**, and click **Done**.

To remove a statistic for an indicator:

1. In the Summary Performance Indicators section, click the link for the resource name associated with a summary performance indicator.
2. In the Performance Indicators for Last Hour section, click the **Edit** button.
3. Click **Arrange or remove indicator(s)**.
4. Click the indicator and click the '**x**' button below the list.
5. Click **Save**, and click **Done**.

Adding Notifications

Notifications identify queue events. For example, a re-queue event occurs when a queue sends an available agent an ACD call, but the agent does not answer. The call is returned to the queue to be answered by the next available agent. See the glossary (p. 77) for descriptions of the events.

The Notification section provides a report of queue events based on your specifications.

To add the Notifications section:

1. From the My Home page, click the **Change content** link below the navigation bar.
2. In the General section, select the **Notifications** check box.
3. Click **Done**.

To choose the notification types:

1. Click the **Edit** button for the Notifications section.
2. Click the number of notifications to display in the section.
3. Select the check boxes for the types of notifications to include.
4. Click **Save**.

To display records that exceed the displayable number of records in the Notification section:

1. Click the **More** link below the last record.
2. After viewing the additional records, click **Done** to return to the My Call Center page.

Adding Agent and Queue Summaries

The My Home page can include a section for listing agent summaries and a section for listing queue summaries. In each list, you choose the resources for display and the statistics that are most useful to you. These sections provide a high-level overview of the current status of similar resources. You can click a resource to drill-down for more detail.

To include agent or queue summaries on the My Home page, you first add the section for that summary content and then specify the resources and states or statistics you want to appear in that section.

To add the Agent Summary or Queue Summary section:

1. From the My Home page, click the **Change content** link below the navigation bar.
2. In the General section, select the **Agent Summary** check box or the **Queue Summary** check box.
3. Click **Done**.

To choose the resources and statistics:

1. Click the **Edit** button for the Agent Summary or Queue Summary section.
2. In the Table section, click the **Customize** link, and then select the check boxes for the columns to show. Clear check boxes for columns to hide. Click **Save**.

   For queues, the columns represent queue statistics. For agents, columns represent agent states.
3. In the Content section, click the **Edit** link, and then select the check boxes for the resources to show. Clear check boxes for resources to hide. Click **Save**.
4. Click **Done**.

Adding Queue Summary Statistics

Summary statistics provide total values for queues and queue group activity over the last one hour. For example, the "Answered" summary statistic shows the total number of calls answered by a queue in the last one hour. For a description of the available statistics, see the glossary (p. 77).

On the My Home page, several summary statistics appear automatically for the queues and queue groups you chose the first time you logged in to the web interface. You can change these default statistics and you can add any combination of summary statistics for other sections you add to the My Home page. For example, you can display the number of calls answered and the average time to answer for one section and the number of abandoned calls and the maximum wait time for another section.

Summary statistics can be set up to operate as performance indicators. Performance indicators highlight when the value of a summary statistic value does not meet specified thresholds. For example, if the value of the Answered summary statistic falls below 5, then you can specify that the statistic should flash the color red. Together summary statistics and performance indicators provide a powerful method of monitoring current conditions in the contact center.

Threshold values for performance indicators are set in the Review area. For information about setting threshold values, see “Editing Performance Indicators” (p. 33). For information about the display options for performance indicators, see “Configuring Performance Indicators” (p. 17).

To choose summary statistics:

1. Click the **Edit** button for the section you want add statistics to.
2. Select the **Table** check box and click the **Customize** link.
3. Select the check boxes for the statistics you can to add. Clear other check boxes.
4. Click **Save**, and click **Save** again.

Customizing the My Home Page Layout

You can change the layout of the My Home page. The layout can use either a one- or two-column format. You can also change the order that sections appear on the page.

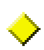
To customize the format of the My Home page:

1. From the My Home page, click the **Change layout** link below the navigation bar.
2. Click the radio button to choose the column layout.
3. In the Section Order list, click a section and use the **Up** or **Down** arrows to move the selected section to its new position in the list.

   For two-column layouts, two lists appear in the Section Order. The list on the left represents the first column of the layout and the list on the right represents the second column of the layout. Use the **Left** or **Right** arrows to move sections to the appropriate column.
4. Click **Save**.

Configuring Performance Indicators

The web interface uses performance indicators to represent the compliance of resources to user-defined service level thresholds. The following table describes the states represented by the performance indicators:

	Normal. The resource is complying with all service level thresholds
	Warning. The resource is exceeding the warning level for one or more service levels
	Critical. The resource is exceeding the critical level on one or more service levels

You can

- change the colors used for warning and critical alarms.
- choose whether to display performance indicators as icons with a label or text only
- choose the size of fonts used for performance indicators

To configure performance indicators:

1. From the Preferences index pane, click **General**.
2. Click **View Options**.
3. Click the display type (either icons or text).
4. If you want to change an alarm state color, click the color box arrow and click the new color.
5. Click the font size for text used for performance indicators.
6. Click **Save**.

Chapter 6 Real-Time

The Real-Time area provides current information about the status of queues, queue groups, and trunk groups. For example, the real-time information for a queue shows the status of agents who belong to that queue.

The Real-Time area index pane includes a My Resources page and one page for each queue, queue group, or trunk group in your contact center: Resources that you chose on the Welcome page the first time you logged in appear on the My Resources page by default.

Customize the My Resources page to add the real-time section for queues, queue groups, and trunk groups of special interest to you in one convenient location. For example, if you frequently check the real-time status of the North East Technical Support queue and the All Technical Support queue group, you can add the real-time section for these resources to the My Resources page. Otherwise, you would need to access the North East Technical Support queue resource page and the All Technical Support queue group resource page separately.

For queues and queue groups, you can choose how you want to agent information formatted. You can also add information about the calls waiting for any queue resource. This information gives you a quick overview of the number of calls waiting in the queue and how long the calls have been waiting. You can also use this content to investigate the status of the calls waiting.

You can monitor trunk groups for irregularities that may need your attention, such as a trunk that is being used by too many calls.

To give you a quick status of recent activity, you can add summary statistics for resources, such as the total number of calls answered in the past hour. Summary statistics can be set up to function as performance indicators. Performance indicators highlight when the value of a summary statistic is operating within an acceptable threshold, or when the value is marginally or critically outside of an acceptable threshold.

You can right-click the cell of any resource on the Real-Time area pages to access corresponding Review or Visualizer information. For example, you can view information in Visualizer about a current call (if the Call ID for the agent is known) or all calls (if the selected cell includes an agent).

Preferences let you customize options for the Real-Time area. For example, you can choose the colors to represent agent or trunk group states.

Enterprise sites - if the site is licensed for enterprise, the index pane displays each active site name in bold text with its resources displayed in an indented list below. To select a page, locate the site name in the index pane and select the page to view below the site name.

Tip: You can add to the My Home page any section in the Real-Time area.

Adding Resource Sections to My Resources

My Resources lets you monitor the real-time status of the queues, queue groups, and trunk groups that are most important to you from one convenient location.

By default, My Resources includes one section for each resource that you chose on the Welcome page the first time you logged in. You can add sections for other queues, queue groups, and trunk groups as needed.

To add a resource section to My Resources:

1. Click **My Resources** in the Real-Time area index pane.
2. Click the **Change content** link below the navigation bar.
3. Click the **Edit** link for the resource type.
4. Select the check box for the resource.
5. Click **Save** and click **Done**.

Changing the Order of Resource Sections on My Resources

After adding resources to My Resources, you may want to change the order in which they are listed.

To change the order of resources:

1. Click **My Resources** in the Real-Time area index pane.
2. Click the **Change layout** link below the navigation bar.
3. Select a resource.
4. Click the **Up** or **Down** arrows to move the resource to its new position.
5. Repeat steps 3 and 4 until the resources are listed in the order you want them to appear on the My Resources page.
6. Click **Save**.

Using State Charts or Agent Maps for Queue Resources

Formatting Queues and Queue Groups

Real-Time pages can display queues and queue groups as state charts or agent maps.

- A **state chart** is a table that organizes agents according to their current state: Idle, ACD, Non-ACD, Unavailable, and Logged Out.
- An **agent map** is a grid that groups agents in a logical arrangement. Agent states are represented using a combination of icons and text, as well as colors you can choose. When you choose the agent map display format, the map does not contain any agents until you populate the cells with agents.

You can set the size options (for example, the number of rows and columns in an agent map grid) for each resource.

For a description of agent states and the icons and text used to represent them, see “Agent States” (p. 69).

Other formatting options are available using the Real-Time preferences: view options and agent state colors.

To change a state chart to an agent map, do one of the following:

- In the Real-Time area, click the **Edit** button on the section banner for the resource. Then, click the **Agent map** radio button. To change the grid size, type the number of rows and columns for the grid in the appropriate boxes. Click **Save**.
- In the Real-Time area, click a cell, and click **Display Agent Map**.

If you also want to change the grid size, right-click a cell and click **Resize Grid**. Without clicking the mouse button, move the pointer until the new size is highlighted. Click the mouse button.

To change an agent map to a state chart, do one of the following:

- In the Real-Time area, click the **Edit** button on the section banner for the resource. Then, click the **State chart** radio button. To change the number of rows in the state chart, type the number in the text box. Click **Save**.
- In the Real-Time area, click a cell, and click **Display State Chart**.

Populating Agent Maps

For agent maps in the Real-Time area, you must populate the map cells with agents.

To add an agent to an agent to a map cell:

- Right-click the cell, click **Add Agent**, and click the agent from the menu. Adding an agent to a cell that is already occupied automatically removes the original agent from the agent map.

To remove agents, do the following:

- To remove one agent, right-click the cell and click **Remove Agent**.
- To remove all agents from an agent map, right-click any cell and click **Remove All Agents**.

To move an agent to another cell:

1. Click the cell occupied by the agent you want to move. Do not release the mouse button.
2. Drag the agent to the new cell and release the mouse button.

To resize an agent map, do one of the following:

- Right-click on the map and select **Resize Grid** and type the number of columns and rows for the grid. Click *OK*.
- Click the **Edit** button in the section banner of the queue or queue group and type the number of columns and rows in the Agent map boxes.

If you are reducing the size of an agent map, the agents occupying the cells that are removed are removed automatically and placed back in the agent list.

Adding Agent Statistics

You can add statistics for agents in the Real-Time area agent state charts and agent maps. These statistics give you an indication of the activity of each agent at a glance. For a description of the available statistics, see the glossary (p. 77).

The statistics you choose are added for all agents. The value shown for each summary indicator represents activity over the last hour.

To select statistics for agents:

1. Click an agent state chart or agent map in the Real-Time area, right-click the mouse, and click **Agent Statistics**.

   Alternatively, in the Real-Time area, click Preferences, View Options, Agent Statistical Information.

2. From the Available Statistics list, click a statistic and click **Add**.

   You can add a maximum of four statistics. To remove a statistic, select it on the Selected Statistics list and click **Remove**.

3. From the Font Size list, click the size of the text for the statistic when displayed in the cells.
4. Click **Save**.

Using Trunk Group Real-Time Displays

By default, sections for trunk group on Real-Time pages show a list of trunks that belong to the trunk group, along with information about each trunk. This list is referred to as the "trunk group display". This trunk group display is useful to help you monitor trunks for irregularities that may need your attention. For example, if a trunk is being used by too many calls, you need to be aware of this to take action.

For each trunk, the trunk group display shows the ID of the trunk, its current state, and the length of time that the trunk has been in the current state.

For each active trunk, the following call information is also displayed by default:

- Call type (incoming ACD, incoming non-ACD, or outgoing)
- Call state (connected, queued, ringing, on hold, or in conference)
- Location (city, state, country lookup)
- Start time
- Queue, Agent, and Extension

  The queue, agent, and extension are represented by the ID and nickname. If more than one queue, agent, or extension is available, each instance is separated by a semi-colon.

The columns in the trunk group real-time display resize automatically to best fit the information in the window. If a cell provides more information than can be displayed, the tooltip for the cell shows the full information. Hover your mouse pointer over a cell to display the tooltip.

You can change the default information that is displayed in a trunk group real-time display and the text size of that information, and the default colors used to represent trunk state colors in Preferences.

Showing or Hiding Trunk Group Displays

You can choose to hide the trunk group real-time display. For example, if the My Resources page is long because it includes many sections, you can hide some of the trunk group displays to make the page shorter. At a later time, you can show the trunk group displays.

Hiding or showing a trunk group display applies to all sections in the Real-Time area for that trunk group. For example, if the My Resources page includes a Technical Support trunk group and you hide the trunk group display on this page, the display is also hidden on the individual resource page for the Technical Support trunk group.

To show or hide a trunk group display:

1. Click the **Edit** button on the section banner for the trunk group.
2. Select the **Real-time trunk group display** check box.
3. Click **Save**.

Monitoring Calls Waiting for Queue Resources

Showing Calls Waiting

You can show information in real-time about the calls waiting for a queue or queue group. This information gives you a quick overview of the number of calls waiting in the queue or queue group, and how long the calls have been waiting. You can obtain a more detailed view if you want to investigate further.

You view information about calls waiting for a queue or queue group by adding a Calls Waiting display. As new calls are received by the resource, they are added to the Calls Waiting display. Answered, abandoned, or diverted waiting calls are removed from the display.

The Calls Waiting display shows the total number of calls waiting in its header bar. For example:

Calls Waiting (4)

By default, the Call Waiting display shows a summary of the calls waiting. This summary is referred to as "brief view". For each call, this brief view shows the wait time and caller phone number:

03:22 555-555-555

An icon identifies whether a call is external or internal:

-  represents an incoming external call
-  represents an internal call

You can choose to use a statistic other than the caller phone number as the last statistic in the brief view summary.

By default, calls are arranged (or sorted) using the wait time. You can choose another statistic for sorting calls. The selected statistic is added to the brief view, following the wait time.

For example, if you choose to display the DNIS as the last statistic in the brief view summary and arrange the calls by caller phone number, the display may appear as:

0:03:22 1-800-786-1000 Arizona 786 (Arizona)

0:02:21 1-800-787-1000 New York 787 (New York)

If a call waiting time meets the threshold conditions set for a critical or warning alarm, the appearance of the call changes to indicate the alarm condition. For example, the icon for a call alternates between itself and the icon for the alarm condition.

To show the Calls Waiting display for a queue or queue group:

1. Click the **Edit** button for the section you want to include the Calls Waiting display.
2. Select the **Calls waiting display** check box.
3. From the **Position** list, click the option that represents where you want to display to appear.
4. If you do not want to use the caller phone number as the last statistic in the brief view, from the **Second display field** list, click the statistic you want to use.
5. From the **Arrange by** list, click the statistic that on which you want calls sorted. If the selected statistic is not Wait Time, the selection appears as the second in the summary, following Wait Time.
6. Click **Save**.

To quickly change the call arrangement:

1. Click the Calls Waiting display.
2. If you want to change the statistic used to arrange calls, right-click the display and click **Arrange By** and click the statistic.
3. Right click in the Calls Waiting display, and click **Sort Ascending** or **Sort Descending**.

Viewing Details about Calls Waiting

If you notice information in the brief view of the Calls Waiting display that you want to investigate, you can view more details about calls. You can view call details for more than one call at a time.

Detail view is formatted as follows:

from <*Automatic_Identification_Number*> <*city*, *state_province*, *country*>
at <*time_received_in_queue*>
DNIS: <*id name* (*nickname*)>
Queue: <*id name* (*nickname*)>
Credit to <*id name* (*nickname*)>

If a value is not available, it is omitted from the detail view. As well, the statistic you chose to include in the brief view is not duplicated in the detail view. This statistic is the last value shown in the brief view.

The *time_received_in_queue* displays the time the call was received in the current queue. If a call is listed in a queue group, the start time indicates when that call was added to the most recent queue. For example, assume that the All Support queue group includes Queue A and Queue B. If a call waits in Queue A and then moves to Queue B, the start time shown for the call in All Support is reset to show the start time when the call moves to Queue B.

When viewing queue-related details, if a call is waiting in more than one queue, all queue IDs are listed.

For information about the statistics available, see the glossary (p. 77).

To view details for a waiting call:

- Click the call summary. You can view details for more than one waiting call at a time. If you want to view details for all waiting calls, right-click the display and click **Expand All**.

To return to brief view:

- Click the call details. If you want to return all detailed views to brief view in the current Calls Waiting display, right-click the display and click **Collapse All**.

Drilling Through to Visualizer

Visualizer is a powerful tool that can provide additional information about activity represented on Real-Time pages. For example, you can drill through to Visualizer from an agent cell in a state chart to view information about all calls handled by that agent. From a trunk group real-time display, you can view today's activity on a trunk by drilling through to Visualizer.

Drilling through to Visualizer is an easy way to obtain information about calls that occurred today.

To drill-through to Visualizer:

- In a trunk group real-time display, right-click a trunk and click **Visualizer, All Calls** to display information about all calls on the trunk or **Visualizer, Call** to display information about the current call. The **Visualizer, Call** option is available only if the trunk currently has a call.

Adding Summary Statistics for Queue and Trunk Resources

Summary statistics provide total values for queue, queue group, and trunk group activity over the last one hour. For example, the "Answered" summary statistic for a queue shows the total calls answered by the queue in the last one hour. For a description of the available statistics, see the glossary (p. 77).

On Real-Time pages, you can add any combination of summary statistics for each resource section. For example, you can display the number of calls answered and the average time to answer for one section and the number of abandoned calls and the maximum wait time for another section.

Summary statistics can be set up to function as performance indicators (p. 25).

To choose summary statistics:

1. Click the **Edit** button for the section you want add statistics to.
2. Select the **Table** check box and click the **Customize** link.
3. Select the check boxes for the statistics you can to add. Clear other check boxes.
4. Click **Save**, and click **Save** again.

Defining Performance Indicators for Queue and Trunk Resources

Summary statistics can be set up to function as performance indicators. Performance indicators highlight when the value of a summary statistic is operating within an acceptable threshold, or when the value is marginally or critically outside of an acceptable threshold. For example, the following indicator shows that the All Support queue is not meeting specified thresholds:

 All Support (Support)

Together, summary statistics and performance indicators provide a powerful method of monitoring current conditions in the contact center.

The following table describes the states represented by the performance indicators:

	Normal. The resource is complying with all service level thresholds
	Warning. T he resource is exceeding the warning level for one or more service levels
	Critical. T he resource is exceeding the critical level on one or more service levels

For information about adding summary statistics, see “Adding Summary Statistics for Queue and Trunk Resources” (p. 24).

For information about the display options for performance indicators, see “Configuring Performance Indicators” (p.17).

To set a threshold for a summary statistic:

1. Click the name of the statistic.

   Statistic thresholds are set in the Review area. The Review page for the resource appears.

2. In the Performance Indicators for Last Hour section, click the **Edit** button.
3. Do one of the following:
   - If no threshold has previously been set for this statistic, click the Add indicator link. From the Available performance indicators list, select the statistic.
   - If a threshold has been set for this statistic, click the **Edit** link for the indicator.

   For a definition of the statistics, see the glossary (p. 77).

4. Set the threshold values, as appropriate.
5. Click **Save**, and click **Done**.

Real-Time Area Preferences

Selecting Real-Time View Options

View option preferences for the Real-Time area let you specify the properties shown for agents in state charts and agent maps, and trunk group real-time displays. You also choose the font size for properties when displayed on Real-Time pages.

To select view options for the Real-Time area:

1. From the Preferences index pane, click **Real-Time**.
2. Click **View Options**.
3. From the Font Size list, click the size of the text for the properties when displayed on Real-Time pages.
4. In the Agent Properties to Display section, select the check boxes of the properties to show for agents in state charts and agent maps. Clear check boxes for properties you don't want displayed.
5. In the Trunk Group Properties to Display section, select the check boxes of the properties to show in trunk group real-time displays. Clear check boxes for properties you don't want shown.
6. Click **Save**.

Selecting Real-Time Agent Statistics

You can choose the statistics displayed in the Real-Time area for agents in agent state charts and agent maps. For a description of the available statistics, see the glossary (p. 77).

Tip: You can quickly access the agent properties and agent statistics from state charts and agent maps in the Real-Time area. Click a cell and then right-click it. From the menu, click **View Options** to change agent properties or **Agent Statistics**.

To select agent statistics for the Real-Time area:

1. From the Preferences index pane, click **Real-Time**.
2. Click **Agent Statistical Information**.
3. From the Available Statistics list, click a statistic and click **Add**.

   You can add a maximum of four statistics. To remove a statistic, select it on the **Selected Statistics** list and click **Remove**.
4. From the Font Size list, click the size of the text for the statistic in the cells.
5. Click **Save**.

Selecting Real-Time Agent State Colors

You can change the default colors used to represent agent states used in agent state charts or maps of the Real-Time area.

To change colors for agent states:

1. From the Preferences index pane, click **Real-Time**.
2. Click **Agent State Colors**.
3. For each agent state color you want to change, click its color box arrow and click the new color.
4. Click **Save**.

Tip: To quickly access the agent colors list from an agent map or state chart in the Real-Time area, right-click a cell and click **State Colors**.

Selecting Real-Time Trunk State Colors

You can change the default colors used to represent trunk states displayed in the Real-Time area.

To change colors for trunk states:

1. From the Preferences index pane, click **Real-Time**.
2. Click **Trunk State Colors**.
3. For each trunk state color you want to change, click its color box arrow and click the new color.
4. Click **Save**.

Chapter 7 Review

The Review area lets you examine call center statistics for resources over the past 24 hour period.

The Review area index pane includes a My Call Center page and several resource summary pages. One summary page is available for each resource type (queues, queue groups, agents, agent groups, trunks and trunk groups).

Customize the My Call Center page to display review information for resources of special interest to you in one convenient location. You can add sections from any summary page in the Review area to the My Call Center page. In addition to information about specific resources that you add, the My Call Center page includes four types of summary content, providing a powerful method of viewing performance information quickly:

- summary performance indicators

  By default, the My Call Center page displays summary performance indicators for the resources that you chose on the Welcome page the first time you logged in.

- notifications
- agent and queue summaries

Using the resource summary pages in the Review area, you can easily find information about resources that you do not add to the My Call Center page. For example, the Queues summary page provides an overview of the queue statistics for all queues within the call center. From this overview, you can click an individual queue to drill down for more information. From an individual queue page, links are provided up to the queue groups and down to the agent groups.

Tip: You can add to the My Home page any section in the Review area.

Using the My Call Center Page

On the My Call Center page, you can add resource sections, summary performance indicators, notifications, and resource summaries.

Adding Resource Sections to the My Call Center Page

You customize the content of the My Call Center page by adding sections for resources from other Review area pages to make them available in one convenient location. For example, you can add an Overview section for each resource to the My Call Center page to give you a summary of the statistics for all resources.

The sections available depend on the resource type and page you are adding them to. For more information, see:

- Sections for Agents and Agent Groups (p. 69)
- Sections for Queue and Queue Group (p. 71)
- Sections for Trunks and Trunk Groups (p. 74)

To add a section to the My Call Center page:

1. From the My Call Center page, click the **Change Content** link.
2. In the My Sections list, click the **Add section** link.

   The My Sections area lists the sections for each resource that have already been added to the My Call Center page.
3. **Enterprise sites only** - select the site the where the page content will originate from the Site list. This list contains an entry for each active enterprise site as well as an entry for All Sites.
4. Select a resource type from the Resource type list, click the resource associated with the section you want to add, and click **Continue**.
5. Select the check box for each section you want to display on the My Call Center page. Clear check boxes for sections you don't want to display. Click **Save**.
6. For each additional section you want to the My Call Center page, repeat steps 2 to 5.
7. Click **Done**.

To edit an existing section on the My Call Center page:

1. From the My Call Center page, click the **Change Content** link.
2. Click the **Edit** link for the section.
3. Update the check boxes to select the sections you want to display. Clear check boxes for sections you don't want to display. Click **Save**.
4. Click **Done**.

Adding Summary Performance Indicators

Summary performance indicators highlight when a resource has not met specified thresholds in the last 24-hour period. For example, the following indicator shows that the All Support queue has not met its service criteria over the 24 hours:

 All Support (Support)

For information about the display options for performance indicators, including the colors that represent each indicator, see “Configuring Performance Indicators” (p.17).

The My Call Center page includes a Summary Performance Indicators section in which you can add any resource. The status of the indicator for a resource is determined by the threshold value you set.

If you do not want to use summary performance indicators, you can hide this section on the My Call Center page.

To display the Summary Performance Indicators section:

1. From the My Call Center page, click the **Change content** link below the navigation bar.
2. Select the **Summary performance indicators** check box to display this section.

   Clear this check box when you want to hide this section.
3. Click **Done**.

To add resources to the Summary Performance Indicators section:

1. Click the **Edit** button for the Summary Performance Indicators section.
2. Click the **Edit** link for the resource type.
3. Select the check boxes for the resources for which you want to display summary performance indicators.
4. Click **Save**, and click **Done**.

To view the statistics that comprise the status of the indicator:

- Click the link for the resource name associated with a summary performance indicator.

To add statistics to an indicator or edit threshold values for existing statistics:

1. In the Summary Performance Indicators section, click the link for the resource name associated with a summary performance indicator.
2. In the Performance Indicators for Last Hour section, click the **Edit** button.
3. Do one of the following:
   - To add a new statistic, click **Add indicator**. Select the statistic from the list and type threshold values for one or both indicator types (Warning and Critical).
   - If a threshold has been set for this statistic, click the **Edit** link for the indicator. Edit the threshold values for one or both indicator types (Warning and Critical).

     For a definition of the statistics, see the glossary (p. 77).
4. Click **Save**, and click **Done**.

To remove a statistic for an indicator:

1. In the Summary Performance Indicators section, click the link for the resource name associated with a summary performance indicator.
2. In the Performance Indicators for Last Hour section, click the **Edit** button.
3. Click **Arrange or remove indicator(s)**.
4. Click the indicator and click the '**x**' button below the list.
5. Click **Save**, and click **Done**.

Changing the Order of Performance Indicators

You can change the order in which performance indicators appear in the Performance Indicators for Last Hour section of each resource page.

To change the order of performance indicators:

1. In the Performance Indicators for Last Hour section, click the **Edit** button.
2. Click **Arrange or remove indicators(s)**.
3. Click the indicator and use the Up and Down buttons to move it to the new position.
4. Click **Save**, and click **Done**.

Customizing Notifications

Notifications identify queue events. For example, a re-queue event occurs when a queue sends an available agent an ACD call, but the agent does not answer. The call is returned to the queue to be answered by the next available agent. See the glossary (p. 77) for descriptions of the events.

The Notification section provides a report of queue events based on your specifications.

To display or hide the Notifications section:

1. Click the **Change Content** link.
2. Select the **Notifications** check box to display this section and clear it to hide this section.
3. Click **Done**.

To choose the notification types:

1. Click the **Edit** button for the Notifications section.
2. Click the number of notifications to display in the section.
3. Select the check boxes for the types of notifications to include.
4. Click **Save**.

To display records that exceed the displayable number of records in the Notification section:

1. Click the **More** link below the last record.
2. After viewing the additional records, click **Done**.

Customizing Agent and Queue Summaries

The My Call Center page includes a section for listing agent summaries and a section for listing queue summaries. In each list, you choose the resources for display and the statistics that are most useful to you. These sections provide a high-level overview of the current status of similar resources. You can click a resource to drill-down for more detail.

To use the agent or queue summaries on the My Call Center page, you specify the resources and states or statistics you want to appear in that section.

To display or hide the Agent Summary or Queue Summary section:

1. Click the **Change Content** link on the My Call Center page.
2. Select the **Agent Summary** or **Queue Summary** check box to display each section or clear it to hide each section.
3. Click **Done**.

To choose the resources and statistics:

1. Click the **Edit** button for the Agent Summary or Queue Summary section.
2. In the Table section, click the **Customize** link, and then select the check boxes for the columns to show. Clear check boxes for columns to hide. Click **Save**.

   For queues, the columns represent queue statistics. For agents, columns represent agent states.
3. In the Content section, click the **Edit** link, and then select the check boxes for the resources to show. Clear check boxes for resources to hide. Click **Save**.
4. Click **Done**.

Using the Resource Summary Pages

Adding Resource Sections to Summary Pages

You can select the sections for display on the All Queues page, All Queue Groups page, All Agents page, the All Agent Groups page, or any individual queue, queue group, agent or agent group page in the Review area. By default, all sections are displayed. Any changes affect only the page where the content change request originated.

The sections available depend on the resource type and page you are adding them to. For more information, see:

- Sections for Agents and Agent Groups (p. 69)
- Sections for Queue and Queue Group (p. 71)
- Sections for Trunks and Trunk Groups (p. 74)

To add sections to a Summary Page:

1. From the page you want to change, click the **Change Content** link.
2. Select the check box for each section you want displayed. Clear check boxes for sections you do not want displayed.
3. Click **Save**.

Editing Performance Indicators

There are several statistics that indicate the performance level of a call center. On resource summary pages and individual resource pages in the Review area, you can set thresholds for these statistics and visually display when conditions are within acceptable levels or marginally to critically exceeding threshold levels. For example, the following indicator shows that the All Support queue has not met specified thresholds:

All Support (Support)

The following table describes the states represented by the performance indicators, including summary performance indicators:

Normal. The resource is complying with all service level thresholds

Warning. The resource is exceeding the warning level for one or more service levels

Critical. The resource is exceeding the critical level on one or more service levels

For information about the display options for performance indicators, see “Configuring Performance Indicators” (p.17).

To set threshold values for performance indicators:

1. Click the **Edit** button in the section banner of the Performance Indicators section.
2. Do one of the following:
   - If no threshold has previously been set for this statistic, click the Add indicator link. From the Available performance indicators list, select the statistic.
   - If a threshold has been set for this statistic, click the **Edit** link for the indicator.

     For a definition of the statistics, see the glossary (p. 77).
3. Set the threshold values, as appropriate.
4. Click **Save** and click **Done**.

To change the display order of the performance indicators:

1. Click the Arrange or remove indicator(s) link.
2. For each performance indicator you want to reorder, select the performance indicator in the Performance indicators list box and use the Up or Down arrows, located to the right of the list box, to move the selected performance indicator up or down the list.

   Performance indicators are displayed in a horizontal, left-to-right order. The performance indicator at the top of the list box will be the first performance indicator displayed at the left side of the Performance Indicators section of the page.
3. Click **Save** and click **Done**.

To remove a performance indicator:

1. Click the **Edit** button in the section banner of the performance indicators section.
2. Click the **Arrange or remove indicator(s)** link.
3. Select a performance indicator in the Performance indicators list box.
4. Click the 'x' button below the list box and click **OK**.
5. Click **Save** and click **Done**.

Choosing the Display Order of Sections

You can change the display order of sections on the Review area pages.

If you change the order of sections on the My Call Center page, the order is completely independent of the order that the same sections appear on other pages. You do not have to group sections together on the My Call Center page based on relationships on other pages.

To change the display order of the sections on a Review area page:

1. Click the **Change layout** link below the navigation bar.
2. Click a section and use the **Up** or **Down** arrows to move the selected section to its new position in the list.
3. Click **Save**.

Review Periods and Refresh Rates

You control the review period and data refresh rate in the Review area using the Review Period and Refresh lists in the content pane.

The review period specifies the resolution of the reporting period for queues and queue groups. There are four reporting periods for queue or queue group data and statistical averages: Last Hour, Last 12 Hours, Last 24 Hours, and Current Day (from 00:00 of the current day to the current time). The default reporting period is Current Day.

The refresh rate determines how often the Review section updates with the latest information from the server. By default, the section is not updated.

Changing the review period or refresh rate on one page affects all pages in the Review area, with one exception. For agents and agent groups, the reporting period is always fixed to the current day.

Display Options for Tables and Charts

You can determine which tables or charts to display in a section. For each table or chart, you can specify its display options. Charts may not be available for all sections.

To customize a table or chart:

1. Click the **Edit** button on the section banner of the section that contains the table or chart.
2. Select the check boxes for each table or chart you want to include in the section. Ensure that the check box for tables and charts you do not want to include are not selected.
3. Click the **Customize** link for the table or chart you want to modify display options.
4. For tables, select the check box for each column you want to include in the table. Ensure that the check boxes for columns you do not want to include are not selected. Click **Save**.
5. For charts, change the options as required, checking the preview to see how each change will be applied. After making your updates, click **Save**.
   - **Chart type** - select the type of chart. The options are Line, Bar, Pie, or Line and Bar Combo. Not all charts will provide options for every chart type.
   - **X-axis -** select the source for the x-axis data.
   - **Y-axis -** select the source for the y-axis data from the Y-axis:Primary list. For Line and Bar Combo chart types, select the source for the secondary y-axis from the Y-axis:Secondary list. Select the **Show gridlines** check box to view the lines in the chart.
   - **Background color** - click the color that you want used as the chart background. White is the best choice for displaying charts transparently on the page.
   - **Other elements -** enable the **Show legend** check box to view the chart legend. Select **Show callouts** to display callouts (if any). Click the Colors button to select the colors to use in the chart.
   - **Update Preview -** click to view a preview of your customized chart.
6. Click **Done**.

Chapter 8 Replay

The Replay area lets you review call center activity in real-time mode for a period you select. You specify that when certain triggers occur (such as calls waiting greater than 20), the replay pauses, giving you a snapshot of the status the call center at that time. Statistics may appear as tables or charts.

Replay data is available only for the local site and only if logged data for the selected period is available. Data for enterprise sites cannot be viewed through the Replay pages.

Note: The webSign in the Replay area banner continues to display real-time statistics, allowing you to monitor current activity while reviewing past activity.

Choosing the Type of Content to Replay

Use the Replay area to view activity for the Review area, webSign, and Real-Time area. The Replay index pane organizes the content you can view in replay mode as follows:

- My Call Center (from the Review area), followed by a page for each resource type
- webSign
- My Resources (from the Real-Time area), followed by a page for each resource type.

The order of the Review and Real-Time pages in the Replay index pane is the same as the order on the Review or Real-Time index pane.

When you select a Review or Real-Time page from the Replay index pane, the page operates the same as if you viewed it in the Review or Real-Time area. For example, for a Review page, you can use the links throughout the pages to drill-down to the individual resource level.

You cannot alter content on pages in the Replay area. You must change the content in the corresponding Review or Real-Time area. For example, the Calls Waiting display is shown for a resource only if it appears on the resource's Real-Time page.

For webSign, the Replay content area displays the webSign statistics in a table instead of the scrolling sign. The text color of the statistics in the table illustrate when warning and critical threshold alarms are active.

Replay Set Up

You configure the Replay area to display the information you need using the Replay Set-up page. You select a start date and, optionally, a stop time within the 24-hour period of the selected date. You also define a resource trigger. When the condition defined by the trigger is met, replay stops and a message indicates the queue/group where the trigger occurred.

There are three conditions for resource triggers:

- **Calls waiting greater than:** When the replay encounters the number of calls on the queue/group exceeding the threshold value you specify, the replay is stopped.
- **Number of abandoned calls greater than:** When the replay encounters the number of abandoned calls for the queue/group exceeding the threshold value you specify, the replay is stopped.
- **Time of longest waiting call greater than:** When the replay encounters a caller waiting longer than the threshold value you specify, the replay is stopped.

To set up replay or modify existing settings:

1. Click the **Replay Set-up** button in the Replay area banner.
2. From the Replay Set-up page, click the **Change** link in the Start Date area.

   Select the values that represent the day, month, and year from the lists, and click **Save**.

   A message appears if no logged data is available for the date you select.
3. If you want to set a stop time for the selected date, from the Replay Set-up page, click the **Change** link in the Stop Time area.

   The stop time is assumed to be within a 24-hour period. If you don't define a stop time, the replay will progress through the entire 24-hour period.
4. Select the **Time** check box, and then type the hour and minute in the appropriate boxes, and click **Save**.
5. If you want to add a new trigger, do the following from the Replay Set-up page:
   - Click the **Add trigger** link.
   - Select queue or queue group from the Resource type list. This populates the Available resources list box with all available queues or queue groups.
   - Select a queue or queue group from the Available resources list, and click Continue.
   - For each trigger you want to activate, select its check box and type a threshold value. Click **Save**.
6. If you want to edit an existing trigger, do the following from the Replay Set-up page;
   - Click the **Edit** link for the existing resource in the Triggers list.
   - Modify the available triggers. Select the check box and type a threshold value for triggers you want to activate. Ensure that check boxes for triggers you do not want activated are not selected. When you finish modifying the triggers, click **Save**.
7. Click **Done**.

Replay Control

After setting up replay, you can start it. When you start a replay, it begins at 12:00:00 AM on the selected day until one of the following occurs:

- Replay reaches the end of the day or the stop time (if one is defined in the Replay setup). A message indicates that the replay has ended.
- A trigger condition is met. A message indicates that the replay is stopped and describes the trigger that stopped the replay.

When replay ends or a trigger condition is met, the Start Replay button is replaced by the Reset Replay button and a Next> button appears beside the Reset Replay button.

To start replay:

- Click the **Start Replay** link located beside the Replay Setup link.

To restart replay at 12:00:00 AM on the selected day:

- Click Reset Replay.

To continue replay after play stopped when a trigger was met:

- Click **Next>**.

When the replay moves to the first trigger you may move throughout the pages of the Replay area to view the various presentations of the data. When you are ready to move on you may:

- Click **Reset Replay** to return to the My Call Center page of the Replay area at the start time of 12:00:00 am.
- Click **Next>** to move to the next trigger. When you click Next> on the last trigger for the day, you are informed that there are no more triggers.

Chapter 9 Reports

Important: See the *Report Reference Guide for TASKE Contact* for examples of the available reports.

The Reports area provides a page for each reporting period:

- **Daily -** daily report templates generate reports on the chosen resources for the selected day.
- **Weekly -** weekly report templates generate reports on the chosen resources for the selected week.
- **Monthly -** monthly report templates generate reports on the chosen resources for the selected month.
- **Range -** range report templates generate reports for pre-defined date ranges. Date ranges are created on the *Range* page of the Administrator application. Range period are useful for businesses operating on non-standard weeks or months, for example, a business that reports from the 15th day of the month to the 14th day of the next month.
- **Year by Week -** year by week report templates generate reports on the chosen resources for the number of weeks selected. Select any number of weeks from 1 to 52.
- **Year by Month -** year by month report templates generate reports on the chosen resources for the number of months selected. Select any number of months from 1 to 24.

Select the reporting period from the Reports area index pane to view the available report templates. Use the links on these pages to create and edit templates, and to generate reports from the templates.

Generate reports quickly by clicking on the report template name and selecting the date for the report. Generated reports display data in both tabular and graphical formats. Print the report on paper or PDF (portable document format), or export to various standard formats.

Note: Some options are not supported for all telephone systems.

Forecast reports are a special type of report. These reports help you analyze logged contact center data to predict future call volume, the average talk time of each call, and so on. Based on each of these values, the number of agents required to efficiently manage the call volume and achieve the desired service level. The historical basis of these reports is either daily or weekly, segmenting the contact center day with quarter-hour, half-hour, or hour intervals.

Managing Report Templates

A report template defines the parameters for gathering report content for a selected reporting period. A single report template may contain multiple resources and options, making the templates fully customizable and allowing you to generate multiple reports.

The main page for each reporting period has a *Report Templates* section. This section lists the existing report templates for the selected reporting period. Use the following process to create a new report template in the Reports area:

- Step 1: Define the Report Template Name and General Settings
- Step 2: Define Email Properties
- Step 3: Select Report Types

Step 1: Creating a Report Template - Define the Report Template Name and General Settings

1. Select the reporting period for the template from the index pane.
2. Click the New report template link.
3. In the New (Reporting Period Name) Report Template page, type a name for the report in the Name field. This name is the title of reports generated with this template. The template name may only contain upper and lower case alpha characters and numeric characters.
4. Type a description for the report in the Description field to provide further descriptive information. This information is not included in a generated report.
5. **Enterprise sites only -** select the site for the origin of the report data from the Site list. This list contains an entry for each active enterprise site.
6. Select the **Include notification reports** check box to generate a Notification report when the report template generates the report for viewing. A Notification report is not generated when this check box is left blank.

   A notification report informs users of data collection events that have occurred over the time period of the selected report. These reports detail three types of events: data collection started, data collection stopped, and call record errors.
7. Select the **Print this report** template according to the schedule set in Preferences to add this report template to the printing schedule that is defined in the Report Options page of the Preferences area. Adding this report to the printing schedule means that it will print on the selected server printer, at the scheduled time, on the scheduled days.
8. Click **Save** to save the general information for the report template and continue to the (Reporting Period Name) Report Template Properties page.

   In the Report Template Properties page, review the information in the General section of the page and click the **Edit** link in this area to return to the previous page and perform any required changes.

Step 2: Creating a Report Template - Define Email Properties

1. To automatically email the reports in the template, click the **Edit** link for the Email Settings section to open the (Reporting Period Name) Report Template Email Properties page. This page contains the settings for automatic email. Email is sent according to the schedule defined in the Reports Area Preferences page in the Preferences area.
2. Select the **Email this report template** according to the schedule set in Preferences. All email is sent in plain text format.
3. Type the email addresses of those requiring the reports. Separate each email address with a semicolon.

   Alternatively, click **Select Names** to display a list of the available email addresses. Select the addresses from the Available addresses list and click **Add** to add the addresses to the Message recipients list. Click **OK**.

   Note: The list of available addresses is populated with the email addresses stored in saved report templates. Each time a new address is added to a template, this list updates for all templates. If none of your report templates include email addresses, the Available addresses list will be empty. Deleting a template containing a unique email address (an address that does not appear in any other template) removes the address from the Available addresses list.

4. Type a subject for the email in the Subject line box. Leave the subject blank to use the report template name for the subject line.
5. Click **Save** to save the email settings and return to the Report Template Properties page.

   Note: The email will include all reports of the report template. Ensure the template only includes the reports you want the recipients to view.
6. Continue to the Reports section of the page to select the reports to include in the template.

Step 3: Creating a Report Template - Select Report Types

1. In the Reports section of the Report Templates Properties page, click the **Edit** link beside the type of reports to open the selection page.

   An interim page may be present if the report types are divided further. If this is the case, click the Edit link for the report type and continue to the selection page.
2. Select the check boxes of the reports to include in the report template. Each check box represents a report.

   Show internal calls for Extension Call Detail Reports

   Select this check box to include internal calls in the Extension Call Detail report. This check box is disabled by default and when in this state excludes all internal calls from the report.
3. Click **Save**.

   The Selected column of the Reports table in the (Reporting Period Name) Report Template Properties page indicates the number of reports selected for each report type.
4. Repeat this procedure for the remaining report types.
5. Click **Done**.

Changing Template Properties

Selecting a reporting period from the Reports area index pane opens the Report Templates page for that reporting period. Each of these pages contains a single section titled Report Templates that lists every report template defined for the reporting period. Edit these templates at any time using the Properties link for the report template.

To change the properties of an existing report template:

1. Select the reporting period where the report template resides from the index pane of the Reports area.
2. Click the **Properties** link for the report template.
3. Review the information in the General area of the page and click the **Edit** link in this area to perform any required changes in the Report Template page. Click **Save** when the changes are complete to return to the previous page.
4. Click the **Edit** link of the report type in the Reports table.
5. Select the check boxes of the reports to include in the report template. Each check box represents a report.

   Click the **Select All** link in the header of each column to enable all check boxes in the column.

6. Click **Save** to save the report selections and return to the (Reporting Period Name) Report Template Properties page.

   The Selected column of the Reports table in the (Reporting Period Name) Report Template Properties page indicates the number of reports selected for each report type.

7. Repeat steps 4 to 6, as desired, for the remaining report types.
8. Click **Done** in the (Reporting Period Name) Report Template Properties page to complete the set-up of the report template and return to the Report Templates page for the reporting period.

Deleting a Report Template

You can delete any report template. Once deleted, the template cannot be recovered.

To delete a report template:

1. Select the reporting period for the template from the index pane to open the Report Templates page for the period.
2. Click the **Edit** button on the right side of the Report Templates section banner to open the Edit (Reporting Period Name) Report Templates page. This page displays a list box that contains the names of all report templates created for the reporting period.
3. Select a report template from the list box.
4. Click the **x** button below the list box to open the New (Reporting Period Name) Report Template page.
5. Click **OK** and click **Done**.

Viewing Reports

You can view reports of a template for any date with logged data.

To view reports:

1. Select the reporting period where the report template resides from the index page of the Reports area.
2. Click the name of the report template in the Report Templates section of the page.
3. Click the day, month, and year values that represent the date you want to report on.

   To select multiple dates, click the **Select Multiple Dates** link and click the dates on the calendar.

4. Click **View**.

Navigating Reports

After generating a report template, you can view, print, and export the report. Each report is a single page that may consist of a table and one or more charts. The title of the report is located at the top of the page with the date and the site name below.

Once the reports are generated from the report template, several options are available. These options are:

- selecting a report to view
- selecting the report components to view
- returning to the list of templates for the reporting period

Selecting a report to view - the Index Pane for the report template lists an entry for each report contained in the template. Each entry is a link to the report it is referencing. The reports are categorized in the Index Pane based on their reporting resource, with the resource displayed as a bold heading above its reports. The resources are queues, queue groups, agents, agent groups, extensions, extension groups, and trunk groups. By default the first report listed in the Index Pane is the report that is automatically opened in the Content Pane after generating the report template. To display a different report, click its link in the Index Pane. The report content displays in the Content Pane.

Select the tables and charts to view - each report is a single page that always consists of a table may contain one or more charts. If the report has associated charts, you can customize the report page to display the table and charts of your choice. Use the Page Options link at the top of each report page to locate the tools for selecting page content and customizing charts. If the report does not have any associated charts, the Page Options link is not available.

Display Options for Report Pages

If page customization options are available for a report, the Page Options link appears at the top of the generated report page. Use the Page Options link to:

- select the tables and charts to display on the page - every report page includes a table and at least one chart. By default the table and all applicable charts are displayed on every page. You can change the content of your report pages on a page-by-page basis by hiding some information and displaying the rest.
- customize the display of the tables and charts

Your preferences file saves all content selections and display properties set for the report pages of a report template. You do not have to perform these changes each time you generate reports from the report template.

To choose the content for a report page:

1. Follow the steps to generate a report (p. 42).
2. Click the **Page Options** link from the report page you want to edit.
3. Select the check boxes of those sections you want to display on the report page and clear other check boxes.
4. Click **Done**.

To customize a chart:

1. Click the chart.
2. Change these options:

   Chart type - select the type of chart you want to view from the Chart type list. The options are Line, Bar, Pie, or Line and Bar Combo. Not all charts will provide options for every chart type.

   - **X-axis -** select the data source and display options for the x-axis of the chart.

     X-axis data source - select the source for the x-axis data from the X-axis list.

     Show gridlines - enable this check box to display x-axis lines of the grid in the chart.

   - **Y-axis -** select the data source and display options for the y-axis of the chart.

     Y-axis primary data source - select the source for the y-axis data from the Y-axis:Primary list.

     Show gridlines - enable this check box to display y-axis lines of the grid in the chart.

     Y-axis secondary data source - for Line and Bar Combo chart types, select the source for the secondary y-axis from the Y-axis:Secondary list.

   Background color - click the Background color drop-down button to display the Color dialog box. Select the background color for the chart from this dialog box.

   Other elements - enable the check boxes of the chart display properties.

   - **Show legend -** enable this check box to view the chart legend.
   - **Show call outs -** enable this check box to display the labels on the charts. Enabling this check box for line, bar, and line and bar combo graphs displays labels on the x and y axis. Enabling this check box for a pie graph displays labels for each section of the pie.
   - **3D Effect -** enable this check box to view the chart in three dimensions.

   Preview - click Update Preview to view a preview of your customized chart.

   Save – click to save the changes and return to the report.

Print Reports

Several printing options are available for reports and report templates. To print a report or report template you must be viewing the generated report. You can print the:

- current report
- report template in text format
- entire contents of the report template, in text format, on the server's default printer

Printing the Current Report

When you choose to print the current report, a printable representation of the report is displayed in a new browser window. This version appears as it does in the report itself and contains the table and all charts selected for viewing.

To print the current report:

1. Use the appropriate steps to view a report based on a report template.
2. Click the **Prepare to Print** link from any page of the generated report template.
3. Click the **Prepare to print current page of *template name*** radio button.
4. Click **OK**.
5. Use the browser controls to define the print setup and print the report to the printer.

Printing the Report Template in Text Format

The option to prepare to print the report template in text format opens a new browser window that contains a text-based version of each report; it does not contain the charts.

To print the report template in text format:

1. Use the appropriate steps to view a report based on a report template.
2. Click the **Prepare to Print** link in the navigation bar from any page of the generated report template.
3. Click the **Prepare to print report template <template name> in text format** radio button.
4. Click **OK**.
5. Use the browser controls to define the print setup and print the report to the printer.

Printing the Report Template to the Server's Default Printer

The option to print the report template to the server's default printer sends the report template to the server printer that is selected in the Report Preferences. The printout contains a text-based version of each report; it does not contain the charts.

To print the report template to the server’s default printer:

1. Define the global server printer settings in the Print Options of Report preferences.
2. Use the appropriate steps to view a report based on a report template.
3. Click the **Prepare to Print** link in the navigation bar from any page of the generated report template.
4. Click the **Print report template <template name> to server's default printer in text format** radio button.
5. Click **OK**.
6. If the print job is successful, the Print Status dialog box opens indicating a successful printing. Click **OK**.

   If the print job is not successful, click Close on the Print Status dialog box. At this point you may attempt to select a different printer on the Report Preferences page or contact you system administrator to determine the reason for the failure.

Export Reports

Report templates may be exported to several popular file formats. To export a report template the global settings for exporting reports must already be set and you must be viewing the generated report information.

To export the contents of a report template:

1. Define the global export file settings, such as file format and content, through the Report Options page. For instruction on defining the global export file settings, refer to Setting Report Preferences.
2. Use the appropriate steps to view a report based on the report template.
3. Click the **Export** link in the Navigation Bar from any page of the generated report template to open the Download Exported Template's Files page.
4. Examine the list of reports being exported and verify that the reports are present and the appropriate file extension is on the files names. The file names (p. 47) are specifically named for easy identification.
5. Click the link for the report you want to save or view to open the File Download dialog box. From this point, continue with the instructions that suit your task:

To open and view an exported report in its exported file format:

1. Use steps 1 to 5 in “To export the contents of a report template” to open the File Download dialog box.
2. Click the **Open this file from its current location** radio button to open the file in an application compatible to the file type. If the computer cannot identify an application that is compatible with the file type, the Open With dialog box opens. Select the application you want to use to open the exported file from this dialog box.

Note: To open the exported file, an application capable of opening the exported file type must reside on the computer).

To save an exported report to the local computer or the network (if available):

1. Use steps 1 to 5 in “To export the contents of a report template” to open the File Download dialog box.
2. Click the **Save this file to disk** radio button.
3. Browse to the location.
4. Click **Save**.
5. When the file is saved the Download Complete dialog box opens. Click **Open** to open the file, click **Open Folder** to open the folder where the file resides, or click **Close** to close the Download Complete dialog box.

Export File Naming Conventions

Exported reports are named with very specific filenames to aid in the identification of the exported files. The files are named using the following conventions:

Component	Component Option	Filename Code
Period	Daily	Pd
	Weekly	Pw
	Monthly	Pm
	Range	Pr
	Year by Week	Pyw
	Year by Month	Pym
Type	Agent	Ta
	Agent Group	Tag
	Extension	Te
	Extension Group	Teg
	Queue	Tq
	Queue Group	Tqg
	DNIS	Td
	DNIS Group	Tdg
	Trunk	Tt
	Trunk Group	Ttg
	Activity (Queue)	Tact
	Answer Spectrum	Tansp
	Abandon Spectrum	Tabsp
	Interflow Spectrum	Tfsp
	Do Not Disturb	Tdnd
	Hold	Tahld
	Forecast	Fc
	Notification	Tn
Interval	15 Minute	I15
	30 Minute	I30
	60 Minute	I60
	Day	Id
	Week	Iw
	Month	Im
	Area Code	Iar
	DNIS	Idn

Component	Component Option	Filename Code
	Area Code and City	Iac
	State or Province	Isp
	Abandon Caller	Iabn
	Agent	Ia
	Agent Group	Iag
	Extension	Ie
	Queue	Iq
	Queue by Agent	Iqa
	Call Detail	Icd
	Account Code	Iact
	Account Code by Agent	Iacba
	Talk Time Distribution	Ittd
	Peak Offered	Ipo
	Peak Answered	Ipan
	Peak Abandoned	Ipab
	Peak Interflowed	Ipf
Resource #	The resource number is the ID of the reporting resource that is the focus of the report. A reporting resource may be a trunk, trunk group, extension, extension group, agent, agent group, queue, or queue group.	

Using these naming conventions, the filename for a Daily Agent by Interval report, for agent 7500, with a 30-minute interval that is exported to Microsoft Excel would be: PdTaI307500.xls

Email Reports

After generating one or more reports from a report template, email these reports to selected recipients. The email is sent in plain text format. The email includes all reports of a report template. Ensure the template only includes the reports you want the recipients to view.

When viewing the reports of a report template, the Email link is present below the navigation bar. This link opens the Email Report page that provides the tools to email the reports immediately.

Reports may also be scheduled to automatically email according to a schedule (p. 40).

To email the reports of a report template:

1. Use the appropriate steps to view a report for a report template.
2. Click the **Email** link from any page of the generated report template.
3. Enter the email addresses of the intended recipients. Separate each email address with a semicolon.

Alternatively, click **Select Names** to display a list of the available email addresses. Select the addresses from the Available addresses list and click **Add** to add the addresses to the Message recipients list. Click **OK** to accept the selections and return to the previous page.

The list of available addresses is populated with the email addresses stored in saved report templates. Each time a new address is added to a template, this list updates for all templates. If none of your report templates include email addresses, the Available addresses list will be empty. Deleting a template containing a unique email address (an address that does not appear in any other template) removes the address from the Available addresses list.

4. Type a subject for the email in the Subject line box. Leave the subject blank to use the report template name for the subject line.
5. Click **Send** to send the reports of the report template to the selected recipients.

Setting Report Printing Preferences

You can set server printing options for reports using the report preferences. These settings apply to all reports printed by the user.

To access the printing options available for reports:

1. From the Preferences index pane, click **Reports**.
2. Click **Print options**.
3. Select the printer from the Printer list.

   The printers in this list physically reside at the home site and are connected to the TASKE server computer via the local area network.
4. Select the maximum number of lines to print on each page of the printed report.

   By default this number is 38. The amount of information that will fit on the printed page depends on the font selection, font size and the orientation of the printed page.
5. Select the portrait or landscape (recommended) orientation.
6. Select the font from the Face list.
7. Select the font size from the Size list.
8. Select the check boxes of the styles you want to apply to the font.
9. Click **Save**.

Setting Report Export Preferences

You can set report export options using the report preferences. You can export reports to the file formats of several popular applications. These settings apply to all reports exported by the user.

To set report export options:

1. From the Preferences index pane, click **Reports**.
2. Click **Export options**.
3. Select the file format for the exported report.
4. Select the time format for exported report, which determines how the data is displayed in the report.
5. Select the **Export notification reports** check box to export the notification report, if one exists, with the report. If there are no valid events to include in a notification report for the period, a notification report is not generated or exported.

   A notification report informs users of data collection events that have occurred over the time period of the selected report. These reports detail three types of events: data collection started, data collection stopped, and call record errors.
6. Click **Save**.

Setting Report Email Preferences

You can set email preferences using the report preferences. Easily share reports with others through email.

To set the email options for reports:

1. From the Preferences index pane, click **Reports**.
2. Click **Email options**.
3. Type your email address in the From email address box. For example: you@yourdomain.com.
4. Type the name of the email server in the Email server name box.

   If you do not know the email server name, contact your network system administrator.
5. Type the port number that the email server uses to send email in the Port box.
6. Click **Save**.

Setting Report Scheduling Preferences

You can schedule when reports are automatically run using the report preferences.

To schedule report production:

1. From the Preferences index pane, click **Reports**.
2. Click **Schedule** options.
3. Select the **Automatically Run Report Generator** check box.
4. Select the hour of the day you want the reports to run using the Time of day list.
5. Select the check boxes for the days of the week you want the reports to run automatically.
6. Click **Save**.

Chapter 10 Visualizer

TASKE Visualizer is a cradle-to-grave call reporting tool that provides an invaluable resource for call analysis and tracking. Using a natural language filtering system, you can search logged call data and generate a list of call records that match the filter criteria. Filter criteria can include dates, times, call types and activity, call information (such as telephone numbers), and resource participation. You can save the filter setting to run at a later time.

The generated list of calls shows the filter and a one-line summary of each call record matching its criteria. You can click any call in the report to view details about the call.

Defining Filters

Creating Search Filters

Creating a filter to define the criteria you want to use when searching for call records. For filters that you plan to use on an ongoing basis, save the filter to add it to the Visualizer index pane.

To create a filter:

1. Click the **New Filter** link.
2. For the option you want to define, click the **Edit** link.
3. Define the option on the Edit Filter page and click **Done**.
    - Dates
    - Call Types
    - Call Attributes
    - Call Time and Duration
    - Telephone Numbers
    - Account Codes
    - Resources
4. Click **Search**. Results are listed in the Search Results page.
5. If the results provide the content you expected, save the filter.

Saving Filters

After creating or modifying a filter, run a search to ensure that it produces the results you expected. These results are shown on the Search Results page, where you can save the filter for future use. The name of the saved filter is added to the index pane so that you can conveniently run the search again by clicking the filter name.

To save a filter from the Search Results page:

1. Click the **Save filter** link.
2. Type and name and description (optional) for the filter in the appropriate box.
3. Click **Save**.

If you want to create a new filter from this one, select the **Save as new filter** check box and provide a different name and description.

Editing Search Filters

Running a search on a filter produces the Search Results page. In addition to viewing search results on this page, you can easily edit filter properties, if necessary, and run the search again. If you modify the filter options and you plan to use the filter at a future time, save the filter.

To edit a filter:

1. After running a search on a filter, click the **Edit** button in the Filter section banner.
2. Click the **Edit** link for the option you want to edit.
3. Define the option on the Edit Filter page and click **Done**.
    - Dates
    - Call Types
    - Call Attributes
    - Call Time and Duration
    - Telephone Numbers
    - Account Codes
    - Resources
4. Click **Search**.

Renaming Visualizer Filters

The Organize Filters page lists all saved filters and lets you rename existing search filters.

To rename a filter:

1. Click the **Organize Filters** link.
2. Select the filter to rename from the Available filters list.
3. Click the  (Rename) button below the Available filters list to open the Rename Filter page.
4. Type the new filter name in the Filter Title box.
5. Click **OK**.

Reordering Filters

The Organize Filters page lists all saved filters and lets you change the order of the filters in the index pane.

To change the order of the filters:

1. Click the **Organize Filters** link.
2. Select a filter from the Available filters list box.

   The filters are listed in the index pane in the order shown in this list.
3. Use the **Up** or **Down** arrows, located to the right of the list box, to move the selected filter up or down the list.
4. Repeat steps 2 and 3 until the filters are in the desired order.
5. Click **Save**.

Deleting Filters

The Organize Filters page lists all saved filters and the tools for deleting one or more of these filters. Deleting a filter is an **irreversible action**.

To delete a filter:

1. Click the **Organize Filters** link.
2. Select the filter to delete from the Available filters list.
3. Click the **Delete** (x) button.
4. Click **OK**.

Selecting Filter Options

Selecting Dates

You can filter searches to return calls that match date or date range criteria.

To select one or more dates:

1. From the New Filter or Edit Filter page, click the **Edit** link for Dates.
2. Click a date type from the list box.

   For the specific dates type, use **<<** and **>>** to choose the year, use **<** and **>** to choose the month, and click each of the dates in the calendar. To remove a date from the list, select the date in the list and click the **Delete** (x) button to remove the date from the list.
3. Click **Done**.

Selecting Call Types

You can filter searches to return calls that match call type. Call type refers to the origin of calls and their final outcome.

- **Incoming** calls originate outside the business location that the telephone system services.
- **Outgoing** calls originate from an extension within the business location that the telephone system services. The destination of the call is outside the business.
- **Internal** calls originate within the business location the telephone system services and its destination is another extension within the same location.
- **Answered**, **Abandoned**, and **Either** options filter calls based on whether they were answered, abandoned, or either answered or abandoned, respectively.

To filter by call type:

1. From the New Filter or Edit Filter page, click the **Edit** link for Call types.
2. Select the check boxes for the filter options.
3. Click **Save**.

Selecting Call Attributes

You can filter searches to return calls that match call attributes. Call attribute refers to events occurring throughout the life cycle of the call.

- **Transferred** is a call that left the extension and moved to a third party.
- **Placed on hold** is a call that is in a static state at the extension, allowing the extension owner to perform other tasks while the call waits.
- **Conferenced** is a call where more than two parties are involved in the call.
- **Queue** is an ACD call in the queue.

To filter by call attribute:

1. From the New Filter or Edit Filter page, click the **Edit** link for Call attributes.
2. Select the check boxes for each attribute you want to search for.

   If you enable the **Queue** check box, you can choose whether to include re-queued or interflow queue events. Re-queue is a queue event that occurs when the queue sends an available agent an ACD call, but the agent does not answer. The call is returned to the queue to be answered by the next available agent.

   Interflow occurs when a call exceeds the threshold for waiting in the queue and moves to another answering point.
3. If available, specify the frequency for selected attributes.

   For example, if you search for calls placed on hold, Visualizer finds all calls placed on hold one or more times. You can change this default to search for calls placed on hold equal to a number you specify or less than or equal to a number you specify.
4. If available, specify the duration for selected attributes.

   For example, if you search for calls placed on hold, Visualizer returns all calls that meet the specified frequency and that were left on hold for any time duration. You can specify that you only want Visualizer to limit the calls found to those of a time duration you specify. For example, you can search for placed on hold calls that were on hold between 1:00:00 (hh:mm:ss) and 2:00:00.
5. Click **Save**.

Selecting Call Time and Duration

You can filter searches to return calls that match call time and call duration criteria. Several of these options require that you specify the time using the 24-hour clock format. This format is HH:MM:SS.

Call time lets you define filters based on start and end times.

- **Anytime** returns calls that started or ended between 00:00 and 23:59 on the selected dates.
- **Before** returns only calls that started or ended before the specified time on the selected date(s).
- **After** returns only calls that started or ended after the specified time on the selected date(s).
- **Between** returns only calls that started or ended between the specified times on the selected date(s).

Call duration refers to the length of the call.

- **Any duration** returns all calls, regardless of the duration.
- **Less than** returns only calls with a duration lasting less than the specified amount of time.
- **More than** returns only calls with a duration lasting more than the specified amount of time.
- **Between** returns only calls with a duration that falls within the specified time frame.

To filter by call time and duration:

1. From the New Filter or Edit Filter page, click the **Edit** link for Call types.
2. Select the filter options, specifying the time using the 24-hour clock format where necessary.
3. Click **Save**.

Selecting Telephone Numbers

You can filter searches to return calls that match specified whole or partial telephone number criteria.

To add telephone numbers or parts of telephone numbers to the filter properties:

1. From the New Filter or Edit Filter page, click the **Edit** link for Phone numbers.
2. Click the **add** (+) button below the list box in the Phone Numbers section.
3. Select the number format from the Phone number type list.

   The available number formats are:

###-####	+## ### ######
(###) ###-####	00 +## #### ######
###-###-####	011 +## #### ######
1-###-###-####	###############
#####-######	

4. Type the telephone number in the Phone number box, using the format selected. If you do not know the entire telephone number, insert an asterisk for the numbers you are not sure about. The asterisk works as a wild card and represents all numbers from 0 to 9.
5. Click **Save**.

To remove a telephone number from the filter properties:

1. From the New Filter or Edit Filter page, click the **Edit** link for Phone numbers.
2. Select the telephone number.
3. Click the **delete** (x) button.

Selecting DNIS Numbers

You can filter searches to return calls that match DNIS number criteria.

To filter by DNIS number:

1. From the New Filter or Edit Filter page, click the **Edit** link for DNIS numbers.
2. From the Available Numbers list, click the number and click **Add**.
3. Click **Done**.

Selecting Account Codes

You can filter searches to return calls that match account code criteria. Account codes are digits that may represent a product or service. These digits are entered at the extension to classify the current call.

Account codes are not supported in filters for all telephone systems. If account codes are supported, you can

- add database account codes to the filter properties if the TASKE database may contain account codes. The Available codes list is automatically populated with these codes.
- add personal account codes to the filter properties. At times it may be necessary to search for codes that are not in the database.
- remove account codes from the filter properties

To add database account codes to the filter properties:

1. For each code you want to add, click the code in the Available codes list and click the Add button.
2. Click **Done**.

To add personal codes to the filter properties:

1. Click the add (+) button below the Selected codes list box.
2. For each code you want to add, type the code in the Account code box and click Save. Codes may be a maximum of 12 digits in length and consist of numeric digits only.
3. Click **Done**.

To remove an account code from the filter properties:

1. Click the code in the Selected codes list box.
2. Click the delete (x) button below the list box. Database codes are removed from the filter properties only and remain available for use in the Available codes list. Personal codes are removed entirely and must be reentered if needed later.
3. Click **Done**.

Selecting Resources

You can include resources (Agents, Extensions, Queues, or Trunks) in filter properties. You can include all resources of a resource type or select specific resources of a resource type to have the search return only the calls that contain information about those resources.

The process for selecting resources to include in a filter is identical for all types of resources.

To include resources in a filter:

1. From the New Filter or Edit Filter page, click the **Edit** link for the resource type in the Options section.
2. Do one of the following:
   - To include all resources of this resource type, select the **Any <resource type>** radio button.
   - To select specific resources of this resource type, enable the **Only selected <resource type>** option. Click the **Edit** link and select the check boxes of the resources to include in the filter. Click the **Toggle Selection** link to quickly invert the selections for all check boxes. Click **Save**.
3. Click **Done**.

Selecting Call IDs

You can filter searches to return calls that match call ID criteria.

To filter by call ID:

1. From the New Filter or Edit Filter page, click the **Edit** link for Other.
2. Click the number.

   To add a number to this list, click the **+** button below the list. Type the number in the Call ID box and click **Save**.

   To remove a number from this list, click the number and click the x button below this list.
3. Click **Done**.

Using Filter Results

Using the Search Results Page

When you run a search, a high level summary of each call matching the filter criteria is displayed on the Search Results page. From this page, you can click a call to view more detail about it. If there are more records than a single *Search Results* page can contain, additional pages are accessed using the page selector at the bottom of the Search Results page.

The Search Results page contains two sections:

- Filter section
- Search Results table

Filter section - the Filter section of the Search Results page displays the search criteria in plain language. Following is an example of how the filter criteria displays:

> Incoming calls abandoned **on** 08/04/2003; 08/11/2003 **and** Started between 13:00:00-16:59:59

Clicking a link in the filter criteria goes to the page for editing that detail in the criteria. After completing the edits, run the filter again to find the records matching the new filter criteria.

Search Results table - the Search Results table may contain the following columns:

- **Icon -** displays the icon for the call type.
- **Start Time -** displays the date and time the call started. The date is displayed in MM/DD/YYYY format and the time is displayed using the 24-hour clock. Each entry in this column is a link to the Call Details page for the call.
- **Call Type -** displays the call type. There are three call types: Internal, Incoming, and Outgoing.
- **Result -** displays the end result of the call. There are two result types: Answered and Abandoned. The field is usually blank for outgoing calls because the result cannot be determined.
- **Call Duration -** displays the total duration of the call. The call begins when it reaches a trunk in the case of incoming and outgoing calls, or when the call reaches an extension in the case of an internal call. The call ends when one or both of the parties leaves the call.
- **Extension -** displays the extension ID, name, and nick name for each extension involved in the call.
- **Queue -** displays the queue ID, name, and nick name for each queue involved in the call.
- **Account Code** - displays the account code ID, name, and nick name for each account code entered during the call. This only applies if account codes are applicable for the telephone system.

Using the Call Details Page

Running a search on a filter by creating or editing search filters produces the Search Results page that provides a high level summary of each call matching the filter criteria. The Call Details page provides a detailed description of the events in each of these calls. To display the Call Details page for a call, click the link for the call in the Search Results table of the Search Results page.

The Call Details page contains two sections:

- <Incoming> <Internal> <Outgoing> Call section
- Event List table

After displaying the Call Details page for a call record, it is easy to navigate throughout the remaining records that match the filter criteria or return to Search Results page.

<Incoming> <Internal> <Outgoing> Call - displays a descriptive section that summarizes the call activities and also displays the events graphically.

The graphical display is a linear bar graph of the call history. Each segment in the graph represents a new event. Hover your mouse over the events for tooltip descriptions. Icons above the graph provide information on significant events during the call. Hover your mouse over these icons for tooltips describing these events.

For easy identification, each event is represented by a color. The states that may be represented in a call are:

Character	State	Description
R	Ringing	The call is ringing at an extension
S	Start	The initialization of the call
Q	In queue	The call is waiting in a queue
F	Conferenced	Another party joins the call
X	Collector Reset	The TASKE Collector stopped and restarted during the call
N	Single Party	A transitory period during the a call where only one person is engaged in the call
C	Connected	The call was answered at an extension
T	Transferring	The call is transferring from one extension to another
H	On hold	The call is on hold at an extension
D	Diverted	The call was automatically transferred to another extension
P	Parked	The caller appends the call to a busy extension and waits for an indicator that the extension is free

Event List - displays a table detailing each event that occurred during the call. This table includes the following columns:

- **Start Time -** the starting time of the event in HH:MM:SS format, using the 24-hour clock.
- **Event -** the name of the event
- **Duration -** the length of the event in H:MM:SS format.
- **Resources -** the resources (agents, extensions, queues, and trunks) used during the event. Resources are displayed with ID, name, and nick name.

Navigating from the Call Detail page - the top of the *Call Details* page provides three links that navigate back to the *Search Results* page or through the records matching the search filter criteria.

- **Go back to search results -** returns to the *Search Results* page.
- **Previous call -** opens the *Call Details* for the previous record in the *Search Results* table.
- **Next call -** opens the *Call Details* for the next record in the *Search Results* table.

Printing Call Records

Print the records matching your filter criteria from either the Search Results page or the Call Details page. The Prepare to Print link above the index pane provides the resources to select both the format of the printed results and the range of records to print. Once all selections are complete, the results display in a new browser window and the printing features of the web browser print the results when you are ready to print.

To print the call records returned by your filter criteria:

1. Click the **Prepare to Print** link from either the Search Results page or the Call Details page.
2. In the Range section, select the range of records to print:

   All search results - prepares to print all records returned by the search filter, up to the maximum number of search results defined in the Options page.

   Current <Search Results> <Call Details> page - prepares to print all records on the currently displayed Search Results page or the current record displayed on the Call Details page.

   Each Search Results page may display from 1 to 25 records. This value is set in the Options page.
3. In the Format section, select the format for the printed results:

   Table - displays a table with a single-row summary of each record in the defined print range.

   Details - displays each record in the defined print range with all call details. Each record is titled with the call type and contains an Overview section and a Details section.
4. Click **OK**.
5. When ready to print the results, use the printing feature of the web browser to print the results. For printing instructions, refer to the documentation for your web browser.

Setting Visualizer Display Properties in the Options Page

You define preferences for Visualizer display properties. These properties include the:

- maximum number of search results for the Search Results page. If the number of records found exceeds the number set in the Maximum number of search results box, the Search Results title bar displays a message that indicates that additional calls match the filter criteria.
- maximum number of search results and the number of rows for the Search Results page. If more rows are returned than can be displayed on the Search Results page, additional pages are available.
- the columns to include in the table on the Search Results page.
- the number of minutes the time line encompasses in the Call Details page. If the length of the call exceeds the length of the time line, an arrow appears in the bottom, right corner of the Call Details section. Click the arrow to show the next segment of the time line. The number of segments depends upon the length of the call and the set length of the time line.
- colors that represent each call event (such as On Hold) on the Call Details page. These colors are displayed in the call indicator bar.

To set Visualizer display properties:

1. Run a search and click the **Options** link on the Search Results page.
2. In Maximum number of search results, type the maximum number of records that you want returned for display on the Search Results page. The default is 500 and the range is from 1 to 1000.
3. In Number of rows per page, type the number of rows to display on Search Results page.

4. In the Table section, select the check boxes of the columns to include in the table on the Search Results page. Ensure that columns you don't want included in the table are not selected.
5. In Default time axis length, set the number of minutes the time line encompasses in the Call Details page. By default the time line is set to 10 minutes. The range for the time line is from 2 to 30 minutes.
6. In State colors, for each color you want to change, click the color box arrow and then the new color.
7. Click **Save**.

Visualizer Preferences

Choosing Call Details Options

Call details options for Visualizer let you choose the following preferences for the Call Details page:

- number of minutes the time line encompasses. If the length of the call exceeds the length of the time line, an arrow appears in the bottom, right corner of the Call Details section. Click the arrow to show the next segment of the time line. The number of segments depends upon the length of the call and the set length of the time line.
- colors that represent each call event (such as On Hold) in the call indicator bar.

To select call details options:

1. From the Preferences index pane, click **Visualizer**.
2. Click Call Details Options.
3. In Default time axis length, type the number of minutes the time line encompasses.
4. In State Colors, for each state color you want to change, click the color box arrow and click the new color.
5. Click **Save**.

Choosing Search Results Options

Search results options for Visualizer let you choose the following preferences for the Search Results page:

- maximum number of search results for the Search Results page. If the number of records found exceeds the number set in the Maximum number of search results box, the Search Results title bar displays a message that indicates that additional calls match the filter criteria.
- maximum number of search results and the number of rows for the Search Results page. If more rows are returned than can be displayed on the Search Results page, additional pages are available.
- columns to display in the table of the Search Results page

To select search results options for Visualizer:

1. From the Preferences index pane, click **Visualizer**.
2. Click Search Results.
3. In the Maximum number of search results box, type the maximum number of records that you want returned for each search. The default is 500 and the range is from 1 to 1000.
4. In Number of rows per page box, type the number of rows to display on each page.
5. In the Tables section, select the check box for each column you want to include in the Search Results page table.
6. Click **Save**.

Chapter 11 webSign

The webSign is the ticker scrolling across the top of the web interface. This ticker provides real-time queue and queue group statistics, even when the ticker is stopped or paused.

webSign controls let you manage the webSign operation, such as its speed and direction. You configure the webSign using preferences and customize its content by adding queue and queue group statistics.

Operating the webSign

The following controls operate the webSign:

Speed Control

Increase (+) or decrease (-) the scrolling speed using the buttons on the right side of the webSign.

Back/Forward

To independently scroll of the webSign forward or backward, click and hold the mouse button. Drag the mouse in the direction you want the webSign to move (left or right). Release the mouse button to resume normal operation of the webSign.

Stop and start the webSign using the toggle button on the right side of the webSign. Clicking the stop button stops the scrolling and toggles the button to the play button. Click the play button to restart the webSign and toggle the button back to the stop button.

Pause

Click the webSign with the mouse to pause it briefly. Click and hold the mouse button to pause the webSign until you release the mouse button.

Adding webSign Statistics and Alarms

You can customize the webSign by adding statistics and defining values that trigger alarms, referred to as the "threshold" values. You can also edit the threshold values for existing statistics.

To add a statistic to the webSign:

1. From the Preferences index pane, click **webSign**.
2. Click **Statistics**.
3. Click the **Add statistic** link.
4. **Enterprise sites only -** select the site the where the statistic originates from the Site list. This list contains an entry for each active enterprise site.
5. Select the resource for the statistic from the Resource type list.
6. Select a resource from the Available resources list and click **Continue**.
7. Select the statistic from the Statistic list.

8. If you want to set an alarm for this statistic, select the **Alarms** check box and type a threshold value in the **Warning** or **Critical** box.

   The unit of measurement for threshold values depends on the statistic that is selected.

9. Click **Save**.

   If you want to add another statistic for this resource, click **Save and Add Another**, and repeat steps 7 to 9.

To edit the threshold values for an existing statistic alarm:

1. From the Preferences index pane, click **webSign**.
2. Click Statistics.
3. Click the **Edit** link for the statistic.
4. **Enterprise sites only -** select the site the where the statistic originates from the Site list. This list contains an entry for each active enterprise site.
5. In the Alarms section, select the check box for each alarm you want to enable, and then type the threshold value for the alarm in its text box.

   The unit of measurement for threshold values depends on the statistic that is selected.

6. Click **Save**.

To remove a statistic from the webSign:

1. From the Preferences index pane, click **webSign**.
2. Click Statistics.
3. Click the Arrange or remove statistic(s) link.
4. In the webSign Statistics list box:
   - Select a resource to remove the resource and all of its statistics.
   - Select a statistic to remove only that statistic.
5. Click the **'x'** button below the list box.
6. Click **OK**.
7. Click **Save**.

Changing the Order of webSign Statistics

webSign statistics can be rearranged based on your viewing preferences.

To change the order of the statistics for a resource:

1. From the Preferences index pane, click **webSign**.
2. Click Statistics.
3. Click the Arrange or remove statistic(s) link.
4. In the webSign Statistics list, select the entry (a resource or statistic) and use the **Up** or **Down** arrows to move the entry to its new location.

   If you select a resource, all of its statistics will move with it. If you select a statistic, you can move the statistic only up or down within its resource.

5. Click **Save**.

Setting the webSign Appearance and Sounds

You can set the default scrolling speed of the webSign, as well as the colors and sounds that indicate when an alarm has occurred.

To set the appearance of the webSign:

1. From the Preferences index pane, click **webSign**.
2. Click Appearance.
3. From the Scrolling speed list, select a value, where 0 is the slowest scrolling speed and 10 is the fastest scrolling speed.
4. From the Alarms section, click the color box arrow for the alarm you want to change and click the new color.
5. From the Sounds section, click the frequency that you want sounds to play when an alarm occurs. For each type of alarm, click the sound that you want played.

   You can preview the sound by clicking the Sound icon.
6. Click **Save**.

Chapter 12 Chatting with Contacts

Communicate in real-time with other users who are signed in to the web interface. You can have more than one chat on the go at the same time.

Before you can chat with a contact, you must add the contact to your contacts list.

To open Chat and initiate a conversation:

1. Click the **Chat** link in the banner. If this link is not available, contact your system administrator.
2. In the My Contacts list, click the name of the contact.
3. Type a message in the Message box and click the **Send** button.
4. The message appears in the Chatting with panel, showing your name. All subsequent messages posted by you or the contact you are chatting with will appear in this panel.

To return to an existing chat with another contact:

- Click the name of the contact in the My contacts list. The heading for the Chatting with panel states "Chatting with: Name of Individual" to indicate the other contact.

Adding Chat Contacts

You can add or remove contacts from the My Contacts List in Chat using Chat preferences.

To add a contact:

1. From the Preferences index pane, click the **Chat** link.
2. Click the **+** button located below My Chat Contacts.
3. Search for a contact by name or choose to show all Chat users.
4. **Searching for contacts by name -** type the name of the contact in the Search for box and click the Search button.
5. Searching for all contacts - click the Show All button.
6. From the Search results list, select the contacts you want to add and click the **Add** button.

   To remove a contact from the Selected users list box, select the contact and click the **x** button.
7. Click **Save**.

To remove a contact:

1. From the Preferences index pane, click the **Chat** link.
2. Click the contact and click the **x** button located below My Chat Contacts.
3. Click **OK**.

Chapter 13 Troubleshooting

If you have problems using the web interface, the Troubleshooting Wizard may be able to help you determine the cause of the problem. The wizard performs a series of tests that verify communication requirements between your computer and the TASKE server. For example, the wizard checks that your computer meets minimum system requirements.

To start the Troubleshooting Wizard:

1. Click the Welcome topic in the TASKE Contact Web Interface Help.
2. Click the **Troubleshoot** link at the bottom of the topic.
3. From the Troubleshooting Welcome page, click **Next**.
4. Follow the wizard as it performs various tests. At any time before the wizard completes, you can click **Finish** to exit the wizard.

To start the Troubleshooting Wizard if the Help is not available:

- Type the following in your web browser's Address box:
  http://*TASKE_WebServerName*/taske/asp/troubleshoot/start.asp

Chapter 14 References

Agent and Agent Groups

Agent States

The following table describes the agent states. Some states are not available for all telephone systems or may not be used on all agent maps or state charts.

State	Character	Definition
Unknown	?	The current state of the agent is unknown because no activity has been recorded since the Information Server was started.
Logged Out	L	The agent is not logged into the queue and is not available to receive ACD calls.
Idle	I	The agent is available and waiting to be offered an ACD call from the queue.
ACD	A	The agent is on an ACD call from the queue.
Hold	H	The agent has placed an ACD call from the queue on hold.
Non-ACD	P	The agent is currently on an inbound non-ACD call, meaning the call did not originate in the queue.
Outbound	O	The agent has initiated an outbound call to another extension within the contact center. When in this state the agent is considered to be available to accept ACD calls from the queue.
Outbound Trunk	T	The agent has initiated a call to a destination outside the contact center and is occupying an outbound trunk.
Not Ready	N	Agent is not ready to accept an ACD call because the extension is off hook or in a transitional state.
Do Not Disturb	D	The agent has placed the extension in a Do Not Disturb state and cannot receive calls from the queue or calls dialed directly to the agent's extension.
Work Time	W	The agent has placed the extension in a Work Time state. Agents use this state to finish paperwork associated with a completed call. When in this state the agent is not available to receive ACD calls.
Ringing	R	The agent's extension is currently ringing with an incoming ACD call from the queue.
Unavailable	U	The agent is logged into the queue but is in a state that prevents the agent from receiving ACD calls from the queue.

Sections for Agents and Agent Groups

Pages in the web interface display sections that provide information about resources. For example, on the My Resources page in the Real-Time area, "Real-Time" sections show information about the current status of each resource.

Some sections are added by default. You can add other sections depending on the information you want to monitor. The sections you can add depend on the web interface page. For example, you cannot add the Performance Indicators section to the My Home page.

You can add sections to the following pages:

- My Home page
- My Call Center page in the Review area
- Queues and the Queue Groups summary pages in the Review area
- individual queue and queue group pages, which are accessed by clicking resource links on Agent or Agent Group summary pages in the Review area.

The following sections are available for agent and agent group resources.

- Performance Indicators
- Overview
- ACD Calls
- Non-ACD Calls
- Out Calls

For a definition of the statistics available in these sections, see the glossary (p. 77).

Performance Indicators

This section shows performance indicators that highlight when service levels are within acceptable performance levels or are marginally to critically exceeding threshold levels. For example, you can specify that if a service level falls below a certain value, the summary performance indicator flashes the color red. Base performance indicator thresholds for the statistics on these pages on the performance level you want to achieve for that resource.

For information about the display options for performance indicators, see “Configuring Performance Indicators” (p.17). For information about setting threshold values, see “Editing Performance Indicators” (p. 33).

This section is available only for Agent and Agent Groups summary pages in the Review area and individual agent and agent group pages, which are accessed by clicking resource links on summary pages.

Overview

This section is a summary of the statistics. This section may contain a:

- summary (agents only) of agent information that includes the agent ID, agent name, nickname, and links to the agent groups where the agent is a member.
- table of resource statistics.
- chart of the agent activity by call volume, where call distribution is indicated using the ACD, non-ACD, and outbound call types.
- chart of the agent activity by time in state, using the ACD, non-ACD, outbound, DND, work time, and idle states.

For the Agents page or Agent Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual agents or agent groups.

ACD Calls

This section displays summaries of the ACD call statistics. The section may contain a:

- table of the ACD call statistics for the agent or agent group. The table provides links to the pages for the individual agent or agent group.
- chart of the ACD call talk time.
- chart of the number of ACD calls.

For the Agents page or Agent Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual agents or agent groups.

Non-ACD Calls

This section displays summaries of the non-ACD call statistics. The section may contain a:

- table of the non-ACD calls for the agent or agent group. The table provides links to the pages for the individual agent or agent group.
- chart of the non-ACD call talk time.
- chart of the number of non-ACD calls.

For the Agents page or Agent Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual agents or agent groups.

Out Calls

This section displays summaries of the outbound call statistics. The section may contain a:

- table of the outbound calls for the agent or agent group. The table provides links to the pages for the individual agent or agent group.
- chart of the outbound talk time.
- chart of the number of outbound calls.

For the Agents page or Agent Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual agents or agent groups.

Queues and Queue Groups

Sections for Queues and Queue Groups

Pages in the web interface display sections that provide information about resources. For example, on the My Resources page in the Real-Time area, "Real-Time" sections show information about the current status of each resource.

Some sections are added by default. You can add other sections depending on the information you want to monitor. The sections you can add depend on the web interface page. For example, you cannot add the Performance Indicators section to the My Home page.

You can add sections to the following pages:

- My Home page
- My Call Center page in the Review area
- Queues and the Queue Groups summary pages in the Review area
- individual queue and queue group pages, which are accessed by clicking a resource name on a Queues or the Queue Groups summary page in the Review area.

The following sections are available for queue and queue group resources.

- Real-Time
- Performance Indicators
- Overview
- Service Factors
- Answered Calls
- Abandoned Calls
- Interflowed Calls

For a definition of the statistics available in these sections, see the glossary (p. 77).

Real-Time

This section shows current statistics (such as the number of Idle agents versus those on ACD calls) for the resource.

You cannot add the Real-Time section to Review pages.

Performance Indicators

This section shows performance indicators that highlight when service levels are within acceptable performance levels or are marginally to critically exceeding threshold levels. For example, you can specify that if a service level falls below a certain value, the summary performance indicator flashes the color red. Base performance indicator thresholds for the statistics on these pages on the performance level you want to achieve for that resource.

For information about the display options for performance indicators, see “Configuring Performance Indicators” (p.17). For information about setting threshold values, see “Editing Performance Indicators” (p. 33).

This section is available only for individual queue and queue group pages, which are accessed by clicking resource links on Queue or Queue Group summary pages in the Review area.

Overview

This section is a summary of statistics. This section may contain a:

- queue summary (for queues only) that includes the queue properties and links to the queue groups and agent groups associated with the queue.
- table showing resource statistics.
- chart showing the call distribution with the total number of calls answered, abandoned, and interflowed.

For the Queues page or Queue Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual queues or queue group pages.

Service Factors

This section displays service level summaries. The section may contain a:

- table showing the service factors for the queues or queue groups.
- chart showing statistics.
- chart showing the maximum waiting time and the maximum number of calls waiting.
- chart showing the re-queues for all queues/groups.

For the Queues page or Queue Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual queues or queue group pages.

Answered Calls

This section displays answered call statistics. The section may contain a:

- table showing the answered calls for the queues or queue groups.
- chart showing the calls answered on all queues or queue groups.
- chart showing how the answered calls are distributed among the answering agent groups.
- chart showing the maximum and average time to answer statistics on answered calls.
- chart showing the average talk time for answered calls.

For the Queues page or Queue Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual queues or queue group pages.

Abandoned Calls

This section displays abandoned call statistics. The section may contain a:

- table showing the time to abandon and the number of abandoned calls for the queues/queue groups. The table provides links to the pages for the individual queues or queue groups.
- chart showing the average time abandon among the queues or queue groups.
- chart showing the number of abandoned calls for the queues or queue groups.

For the Queues page or Queue Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual queues or queue group pages.

Interflowed Calls

This section displays interflowed call statistics. The section may contain a:

- table showing the interflowed calls for the queues or queue groups.
- chart showing the average time to interflow for the queues or queue groups.
- chart showing the number of interflowed calls for the queues or queue groups.

For the Queues page or Queue Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual queues or queue group pages.

Trunks and Trunk Groups

The following table describes the trunk states.

State	Character	Definition
Connected	C	The trunk is available and in use with at least one call.
Idle	I	The trunk is available but is not in use.
Out of service	U	The trunk is not available.
Unknown	?	The current state of the trunk is unknown because no activity has been recorded since the Information Server was started.

Sections for Trunks and Trunk Groups

Pages in the web interface display sections that provide information about resources. For example, on the My Resources page in the Real-Time area, "Real-Time" sections show information about the current status of each resource.

Some sections are added by default. You can add other sections depending on the information you want to monitor. The sections you can add depend on the web interface page. For example, you cannot add the Performance Indicators section to the My Home page.

You can add sections to the following pages:

- My Home page
- My Call Center page in the Review area
- Trunk and Trunk Groups summary pages in the Review area
- individual trunk and trunk group pages, which are accessed by clicking a resource name on a Trunk or Trunk Groups summary page in the Review area.

The following sections are available for trunks and trunk group resources.

- Real-Time
- Performance Indicators
- Overview
- Service Factors
- Answered Calls
- Abandoned Calls
- Outgoing Calls

For a definition of the statistics available in these sections, see the glossary (p. 77).

Performance Indicators

This section shows performance indicators that highlight when service levels are within acceptable performance levels or are marginally to critically exceeding threshold levels. For example, you can specify that if a service level falls below a certain value, the summary performance indicator flashes the color red. Base performance indicator thresholds for the statistics on these pages on the performance level you want to achieve for that resource.

For information about the display options for performance indicators, see “Configuring Performance Indicators” (p.17). For information about setting threshold values, see “Editing Performance Indicators” (p. 33).

This section is available only for individual trunk and trunk group pages in the Review area, which are accessed by clicking resource links on summary pages.

Real-Time

This section shows current statistics (such as the current state or call type).

You cannot add the Real-Time section the Review pages.

Overview

This section is a summary of statistics. This section may contain a:

- trunk summary (for trunks only) that includes the trunk properties and links to the trunk groups associated with the trunk.
- table showing resource statistics.

For the Trunks page or Trunk Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual trunk or trunk group pages.

Service Factors

This section displays service level summaries in a table that lists the service statistics for the resource.

For the Trunks page or Trunk Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual trunk or trunk group pages.

Answered Calls

This section displays answered call statistics.

For the Trunks page or Trunk Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual trunk or trunk group pages.

Abandoned Calls

This section displays abandoned call statistics.

For the Trunks page or Trunk Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual trunk or trunk group pages.

Outgoing Calls

This section displays outgoing call statistics.

For the Trunks page or Trunk Groups pages in the Review area, this section includes a table of statistics. The table provides links to the pages of the individual trunk or trunk group pages.

Glossary

This glossary defines terms used in TASKE applications. The terms you will encounter depend on the TASKE applications you are using and your telephone system.

Abandoned

The total number of calls that were disconnected by the caller before receiving an answer.

Abandoned Call

A call that is disconnected by the caller before receiving an answer.

Account Code

A number that an agent enters into the telephone system while engaged on an ACD call. The code flags the call type so that call statistics can be collected by the TASKE system for analysis and planning. Account codes are not supported for all telephone systems.

Automatic Call Distribution (ACD) Calls

A type of incoming call that is routed to a queue. Available as an agent statistic in the web interface, this represents the total number of ACD calls the agent has answered from the queue.

ACD Time

The total time spent on ACD calls from the queue.

Agent Group

A virtual grouping of agents used to produce reports that combine the statistics for all agents in the group. In addition, when using the secondary agent ID feature, a single agent with all of his/her IDs may comprise an agent group. This allows a single report to display the agent's activity for all queues serviced.

Agents Do Not Disturb

Available as a queue and queue group statistic, this represents the number of agents assigned to the queue and who are in the Do Not Disturb state.

Agents Logged In

Available as a queue and queue group statistic, this represents the number of agents assigned to the queue and who are logged in.

Agents Logged Out

Available as a queue and queue group statistic, this represents the number of agents assigned to the queue, but who are logged out.

Agents on ACD

Available as a queue and queue group statistic, this represents the number of agents currently on ACD calls.

Agents on non-ACD

Available as a queue and queue group statistic, this represents the number of agents currently on non-ACD calls.

Agents Outgoing

Available as a queue and queue group statistic, this represents the number of agents assigned to the queue, but who are on outgoing calls.

Agents Unavailable

Available as a queue and queue group statistic, this represents the number of agents assigned to the queue and logged in, but who are not available to take calls.

Agents Unknown State

Available as a queue and queue group statistic, this represents the number of agents assigned to the queue and who are in the Unknown state.

Agent

An agent is a person who handles calls for one or more queues in a contact center. Agents log into the telephone system at the beginning of a shift, signaling their availability to accept ACD calls. When a shift is over, agents log out of the telephone system.

Answer Service Factor (%)

The percentage of the total calls offered to the queue that are answered. Calculate the ASF for a queue by dividing the number of calls answered for the queue by the total number of calls offered to the queue.

Answered

Available as a queue, queue group, trunk, or trunk group statistic, this represents the total number of calls that were answered through the queue.

Answered by Group n

Available as a queue and queue group statistic, this represents the percentage of calls handled by each agent group within the queue or queue group. Depending on the switch type, a queue or queue group can have one or more agent groups assigned to it. When an agent from agent group n handles the call, the value of Answered by Group n is updated.

Answered Call

Any call that is answered through the queue at an extension.

Answered Service Factor (ASF)

Available as a queue and queue group statistic, this represents the percentage of calls answered for the queue. Calculate the ASF for a queue by dividing the number of calls answered for the queue by the total number of calls offered to the queue.

Automatic Number Identification (ANI)

A service provided by a telephone company that identifies the telephone number of the caller. Not all trunks can provide this information and it is usually a service that must be purchased from the local telephone carrier.

Available Agents

Available as a queue and queue group statistic, this represents the number of agents currently available to answer calls. The number of agents available includes idle agents, agents on ACD calls, and agents on non-ACD calls.

Average Speed of Answer (ASA)

The time it takes for a call to receive an answer at an extension (non-auto-attendant) after engaging a phone line.

Avg ACD Time

Available as an agent statistic in the web interface, this represents the average time that the agent has spent on ACD calls from the queue.

Avg Answered Talk Time

Available as a trunk and trunk group statistic, this represents the average time spent on calls in the trunk that were answered.

Avg Non-ACD Time

Available as an agent statistic in the web interface, this represents the average time that the agent has spent on non-ACD calls.

Avg Outgoing Time/Avg Outgoing Talk Time

Available as an agent, trunk, and trunk group statistic in the web interface, this represents the average time spent on calls initiated from agents' extensions.

Avg Talk Time

Available as a queue and queue group statistic, this represents the average time that agents have spend on answered calls.

Avg Time to Abandon

Available as a queue, queue group, trunk, and trunk group statistic, this represents the average time that calls waited before being terminated by the caller.

Avg Time to Answer

Available as a queue, queue group, trunk, and trunk group statistic, this represents the average time that answered calls waited before being answered.

Avg Time to Interflow

Available as a queue and queue group statistic, this represents the average number of calls removed from a queue and forwarded to another queue.

Bad log-in

A queue event that occurs when an agent attempts to log into an ACD queue using the wrong agent ID.

Call Load

A calculation that uses the number of calls waiting and the number of agents available to determine the load of call traffic. Call load is expressed as a percentage. Use the following calculation to determine the call load: (Number of Calls Waiting x 100)/Number of Agents Available

Caller Location

The geographical information related to a call, including its city and state or province.

Caller Phone Number

The phone number of the caller.

Calls Waiting

Available as a queue and queue group statistic, this represents the number of calls currently waiting in queue.

Conference

The process of bringing additional parties into a call.

Credit-to

The queue to which a call is credited.

Dialed Number Identification Service (DNIS)

A service, such as 800 and 900 telephone numbers, in which the telephone service provider transmits an identification number to a telephone system receiving a call. The identification number is typically the last four digits which the caller dialed, but may be the whole number or a translated number. This filter allows users to extract call records based on the number dialed by the caller.

Do Not Disturb (DND)

A state an extension may enter that prevents the extension from receiving calls.

Enterprise

A term used to describe the sharing of data among multiple sites through a wide area network (WAN). TASKE enterprise enabled sites connect and share data through the Information Server applications at each site.

Expected Wait Time

Available as a queue and queue group statistic, this represents the length of time that calls are expected to wait in the queue before being answered

Extension Group

An extension group is a virtual grouping of extensions used for reporting purposes. Grouping extensions with similar characteristics allows the Reports application to produce extension group reports that combine the statistics for all extensions in the group.

Extension

A device with a direct connection to the telephone system. This device may be a telephone, an auto-attendant, or a voice mailbox.

Idle Agent

An agent assigned to the queue and is available to accept an ACD call, but who is not currently on a call. The total number of idle agents is available as a queue and queue group statistic.

Idle Time

Available as an agent statistic in the web interface, this represents the average time that the agent has been available and waiting to take ACD calls from the queue.

Incoming Calls

Available as a trunk or trunk group statistic, this represents the total number of incoming calls in the trunk, which includes both answered and abandoned calls.

Interflow/Interflowed

Interflow occurs when a call exceeds the threshold for waiting in the queue and moves to another answering point. The total number of interflowed calls is available as a queue and queue group statistic.

Invalid Record

A queue event that occurs when a call record containing errors is received from the telephone system. This event does not occur for all telephone system platforms.

Location

The geographical information related to a call, including its city and state or province.

Longest Waiting Call

Available as a queue and queue group statistic, this represents the total wait time of the call that has been waiting in the queue the longest.

Longest Waiting Caller

The caller in the queue who has been waiting the longest for an agent to answer.

DND Time

Available as an agent statistic in the web interface, this represents the total time that the agent has placed the extension in the DND state.

Max Calls Waiting

Available as a queue and queue group statistic, this represents the highest number of calls in the queue at one time waiting to be answered.

Max Time to Answer

Available as a queue, queue group, trunk, or trunk group statistic, this represents the longest time that an answered call waited before being answered.

Max Wait Time

Available as a queue and queue group statistic, this represents the time of the call that waited the longest time in the queue to be answered.

Monitor Failed

A queue event that occurs when the CTI link is no longer monitoring activity for the device referenced in the event. This event does not occur for all telephone system platforms.

Non-ACD Calls

Available as an agent statistic in the web interface, this represents the number of inbound non-ACD calls (those calls that did not originate in the queue) that the agent has answered.

Non-ACD Time

Available as an agent statistic in the web interface, the total time that the agent has spent on non-ACD calls.

Occupancy

Available as a trunk group statistic in the web interface, this represents the percentage of time over the past hour that all trunks in the group were busy with calls.

Offered

Available as a queue and queue group statistic, this represents the total number of answered and abandoned calls that entered the queue.

Outgoing Calls

Available as an agent, trunk, and trunk group statistic in the web interface, this represents the total number of outgoing calls made.

Outgoing Time

Available as an agent statistic in the web interface, this represents the total time that the agent has spent on calls initiated from the agent's extension.

Peak Trunks Used

Available as a trunk and trunk group statistic in the web interface, this represents the maximum number of trunks in a trunk group that were in use for any length of time during a single one-minute period of the reporting interval.

Phone Line

A communication line between a telephone system and the central office that provides local telephone service to the business.

Queue Group

A queue group is used strictly for reporting and monitoring purposes in TASKE applications. This is a group of queues assigned a single identifying number that is traceable in reports and the ACD Monitor. For instance, in a contact center with three technical support queues, create a queue group that includes all three queues. Using the queue group, monitor all agents in all three queues simultaneously and include all three queues in a single report.

Queue Time

The time spent in the ACD queue waiting for an agent to become free and is often termed the average speed of answer (ASA).

Queue

A group of answering positions (agents or extension groups). Queues are typically associated with a specific phone number.

Re-queue

A queue event that occurs when the queue sends an available agent an ACD call, but the agent does not answer. The call is returned to the queue to be answered by the next available agent. The total number of re-queues is available as a queue and queue group statistic.

Resource

A general term referring to the database resources. For TASKE Contact and TASKE Reporter, examples of resources include agents, agent groups, queues, and queue groups.

Start time

For the Calls Waiting component, the time that the call was first received in the queue.

Short Duration Calls

Available as a trunk and trunk group statistic, this represents the total number of calls with a talk time less than or equal to the value specified for short talk time. This value is specified in TASKE Administrator.

Talk Time

The length of time a call spends connected to one or more extensions (non-auto-attendant) before terminating.

Telephone Service Factor (%)

The Telephone Service Factor (TSF) is the percentage of the calls offered to the queue that are answered or abandoned within the user-defined TSF time. Calculate the TSF for a queue by dividing the number of calls offered within the TSF time by the total number of calls offered to the queue compared to the total number of calls offered. You specify the threshold, or TSF Time, in the TSF Time field for individual queues.

Telephone Service Factor (TSF) Time

A threshold value measured in seconds. This value is used to calculate the TSF %.

Total answered talk time

Available as a trunk and trunk group statistic, this represents the total time spent on calls in the trunk that were answered.

Total Calls Carried

Available as a trunk and trunk group statistic, this represents the total number of all incoming calls (answered and abandoned) and outgoing calls in the trunk.

Total Calls Offered

The total number of answered and abandoned calls that enter the queue.

Total Outgoing Talk Time

Available as a trunk and trunk group statistic, this represents the total time spent on outgoing calls in the trunk.

Total Talk Time

Available as a queue, queue group, trunk, and trunk group statistic, this represents the total time that agents have spent on answered calls.

Transfer

The process of sending a call from one extension within the organization to another.

Trunk Group

A trunk group is a virtual grouping of trunks used to produce reports that combine the statistics for all trunks in the group.

Trunk

In a contact center environment, a trunk is a communication line between a telephone system and the central office that provides local telephone service to the contact center.

Telephone Service Factor (TSF)

Available as a queue and queue group statistic, this represents the percentage of the calls offered to the queue that are answered or abandoned within the user-defined TSF time. Calculate the TSF for a queue by dividing the number of calls offered within the TSF time by the total number of calls offered to the queue compared to the total number of calls offered. You specify the threshold, or TSF Time, in the TSF Time field for individual queues.

Utilization (%)

Available as a trunk and trunk group statistic, this represents the length of time that the trunk was in use divided by the total time it has been available in the past hour.

Utilization (Time)

Available as a trunk and trunk group statistic, this represents the length of time that the trunk was in use over the past hour.

Wait Time

The time that a call has been waiting in the queue.

Work Time

Available as an agent statistic in the web interface, the time the agent spends performing call-related paper work after a caller has disconnected and is unable to receive ACD calls.

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