User Guide for TASKE Desktop

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Chapter 1 Welcome

TASKE Desktop lets you view real-time contact center conditions on your computer monitor, exchange messages with other TASKE users, and review records of your calls.

Staying current about activity in the contact center is important for maintaining defined service levels. For agents and queues that you choose to monitor, TASKE Desktop provides many statistics to keep you informed of current call traffic and resource performance. Visual indicators, such as color-coding, highlight when statistics are performing marginally or critically outside of threshold values that you define, alerting you to take action.

Rules trigger actions based on events you define. For example, assume that an alarm occurs when fewer than three agents are logged in to a queue. You can create a rule that sends an email to agents requesting that they log in to ensure the queue is staffed appropriately. Some rules are provided by default. You can create non-default rules only if you have appropriate permissions. For information, contact your TASKE Administrator.

If you want to get in touch with another TASKE user, a chat feature lets you exchange messages. For example, if you want to confirm information you are providing to a caller, a chat gives you a quick way to contact another agent without using the telephone. You can choose to keep a transcript of your chats.

At times, you may find it useful to review a history of your calls. TASKE Desktop keeps a record of your calls (and optionally, your chats) for review periods of up to seven days. For example, you may want to verify the length of time you spent talking to a caller two days ago. Using the call history, you can locate the call and use the details provided to obtain the information you need.

TASKE Desktop is an invaluable tool that lets you monitor the real-time contact center conditions from your computer screen, even when you are not logged in as an agent. Its highly customizable interface can be configured to suit your own preferences and objectives, helping you work effectively with your contact center teams.

Upgrading from Agent Desktop

TASKE Desktop replaces TASKE Agent Desktop. Installing TASKE Desktop removes Agent Desktop, if it is available on your computer. You will need to reconfigure resources, alarms and other settings once TASKE Desktop is installed and running.

Signing In or Out

Before TASKE Desktop displays information about the agents or queues that you want to monitor, you must sign in. For security purposes, you sign in by providing your TASKE user name and password. If you do not know these credentials, contact your TASKE administrator.

After you log in, TASKE Desktop appears in the same position on your computer screen as when you logged out of the last session.

When you are not at your computer, sign out of TASKE Desktop (or lock your computer screen) to ensure that no one can access the application while you are away.

To sign in:

1. Start TASKE Desktop, if it is not already running.
2. Click **File, Sign In**.
3. Type the TASKE credentials provided to you in the **User name** box and the **Password** box.
4. If your TASKE administrator has provided you with a server name and port number, type these values in the **Server name** box and the **Server** port box.
5. Click **Sign In**.

To sign out:

1. Click **File, Sign Out**.
2. Click **Yes**.

If TASKE Desktop is closed to the Windows taskbar, you can right-click the taskbar icon to quickly access commands for signing in and out of the application.

Viewing Your Current Status

When you are signed in to TASKE Desktop, information about your current status within the call center appears in the top area of the Desktop window. For example, if John Smith is logged in as an agent, the status area shows information similar to the following when John is on an ACD call:

John Smith	ACD: 0:35:02

from (555) 555-555
641 John Smith (John)
607 Customer Service (CS)
Florida
x641

For example, when user John Smith is on an ACD call from a caller outside of the contact center, the status on John's Desktop window shows John's user information, the call type and the length of time John has been on the call. The status information also shows the phone number of the ACD call, John's agent identifiers, the queue identifiers for the call, the call location, and John's extension ID.

To save space on your computer screen, you can hide or collapse this area. If you collapse this area, a summary of the status appears. For a user on an ACD call, the summary includes the agent name, the call type, and its duration:

John Smith	ACD: 0:35:02

For a description of the details shown for each state, see Status Information Details.

To hide the current status information:

1. Click **Tools, Options**.
2. On the **General** tab, clear the **Show the details pane** check box.

To collapse the current status information:

- Click the **Collapse** button.

 *Collapse button*

Closing, Opening, or Exiting TASKE Desktop

If you want to save space on your computer monitor, you can close TASKE Desktop to the Windows taskbar. Closing TASKE Desktop removes it from your screen, but keeps it running and conveniently accessible. When you want to use TASKE Desktop again, you can easily open it from the taskbar.

When you close TASKE Desktop to the taskbar, you remain signed in. For security, remember to sign out if you will be away from your computer.

If you are no longer using TASKE Desktop, exit the application.

To close TASKE Desktop to the Windows taskbar:

- Click **File, Close**.

To open TASKE Desktop from the Windows taskbar:

- Right-click the TASKE Desktop icon in the Windows taskbar and click **Open Desktop**.

To open TASKE Desktop to a specific tab from the Windows taskbar:

- Right-click the TASKE Desktop icon in the Windows taskbar and click **View, *tab_name***.

  For example, right-click View, Agents to open TASKE Desktop showing the Agents tab.

To exit TASKE Desktop:

- Right-click the TASKE Desktop icon in the Windows taskbar and click **Exit**.

Chapter 2 Setting Up TASKE Desktop

This chapter describes how to customize the operation of TASKE Desktop.

Configuring TASKE Desktop Runtime Options

Several options are available for configuring how TASKE Desktop runs on your computer. Using these options, you can specify that TASKE Desktop

- starts automatically when you log on to your computer so that you don't have to remember to start the application each time you log on. This option is selected by default.
- shows balloon messages when closed to the Windows taskbar. This option is selected by default.
- remains as the top window on your computer monitor

To set automatic startup and balloon message options:

1. Click **Tools, Options**.
2. On the General tab, select the **Automatically run TASKE Desktop when I log on to my computer** check box.
3. On the General tab, select the **Show the tray icon balloon message** check box.
4. Click **OK**.

To set the application window to remain as the top window:

- From the **Tools** menu, select the **Always On Top** check box.

Choosing the Time Duration Format

TASKE Desktop shows time durations in several places. For example, statistics such as the Maximum Wait Time show values that represent a time duration. As well, the status area at the top of the TASKE Desktop window shows the length time that you have been in the current state.

The default time duration format is h:mm:ss. This format shows leading zeros, depending on the length of time represented. For example, forty-five minutes and ten seconds appears as 0:45:10. Additional time duration formats that remove leading zeros are available. For example, using the mm:ss time format, forty-five minutes and ten seconds appears as 45:10.

The correct time appears regardless of the chosen format. For example, if you choose the mm:ss format, the number of hours will still be displayed (for example, 11:55:04). The purpose of the time duration formats is only to remove leading zeros.

To define the time duration format:

1. Click **Tools, Options**.
2. On the General tab, click the appropriate option in **Format Duration Statistics**.
3. Click **OK**.

Setting Up Tabs and Toolbars

A tab is comprised of a header and content. For example, the Queues tab header displays the word "Queues". The Queue tab content includes the tab toolbar (with the Add and View buttons) and the queues that you have selected to monitor.

You may want to change the order in which tabs appear in TASKE Desktop. For example, when you sign in to TASKE Desktop, the information on the first tab (Queues, by default) is displayed. If you want to see the agent information instead, change the tab order so that the Agents tab is first.

To make space available on your computer screen, you can hide

- one or more tabs. For example, if you do not plan to use the History tab, you can remove its header and content from your TASKE Desktop window.
- the tab bar. When you hide the tab bar, none of the tab headers are displayed. The content of each tab remains available, but you can no longer change tabs using the headers.
- the tab toolbars. When you hide the tab toolbars, none of the toolbars are displayed.

To hide a tab:

1. Click **Tools, Options**.
2. On the **Advanced** tab, select the check boxes for the tabs you want to view.
3. If you want to change the order of the selected tabs, click a selected label and drag it to its new position.
4. Click **OK**.

To hide the tab bar:

1. Click **Tools, Options**.
2. On the **Advanced** tab, clear the **Show the tab bar** check box.

To access tab content when the tab bar is hidden:

1. Click **View, Go To**.
2. Click the name of the tab

If TASKE Desktop is closed to the Windows taskbar, right-click the taskbar icon, click **View**, and the name of the tab.

To hide tab toolbars:

1. Click **Tools, Options**.
2. On the **General** tab, clear the **Show the toolbars** check box.

Changing the Size of Text

TASKE Desktop provides several text sizes. The selected size applies to all text shown in the display lists on the Queues and Agents tabs.

To change the text size:

1. Click **Tools, Options**.
2. On the Advanced tab, click a text size from the **Font size** box.
3. Click **OK**.

Configuring Email and Server Settings

Using rules defined in TASKE Desktop, email messages may be sent. For example, you may want to send an email message to other agents in your agent group if a critical alarm occurs, indicating that fewer than 3 agents are logged on.

Before email messages can be sent based on TASKE Desktop rules, you must configure the email server. TASKE Desktop uses these settings to connect to the email server and send the messages.

To configure email settings:

1. Click **Tools, Options**.
2. On the Advanced tab, type the email address from which messages will be sent in the **From email address** box.

   This email address may be your own email address or an address set up for group email communication.
3. Type the name of the email server in the **Email server name** box.

   If you don't know the name of the email server, contact your TASKE administrator.
4. Type the port number of the email server in the **Port** box.
5. Click **OK**.

Locking or Unlocking TASKE Desktop

The TASKE administrator can lock TASKE Desktop to limit your use of the application. If TASKE Desktop has been locked, options are no longer available to you. For example, you may not be able to change resources or alarm thresholds.

If you need access to locked options, contact your TASKE administrator. The administrator can provide a code to you that will unlock TASKE Desktop, allowing you to make the necessary changes. After making the changes, your administrator may require that you relock the application.

To unlock TASKE Desktop:

1. Click **File, Unlock**.
2. Type the unlock code and click **OK**.

To lock TASKE Desktop:

- Click **File, Lock**.

Importing or Exporting Setups

TASKE Desktop provides many configuration options so that you can customize it exactly as you like. In addition to the resources you add to your Desktop, options include time duration formats, alarm thresholds, rules, and so on.

You may want to share your TASKE Desktop configuration. For example, all agents assigned to a queue may decide to use the same configuration to ensure they are monitoring the same resources, statistics, and alarm conditions. You can share the configuration by exporting your TASKE Desktop setup to a file that other users can import.

When a setup is imported, it overwrites any settings in the current TASKE Desktop and takes effect immediately. A good practice is to export your current setup before importing a different one. You can revert to your current setup using the exported version if the new setup does not function as you expected.

If you import a setup that includes queues or agents that you do not have permission to view, TASKE Desktop displays a warning and does not add these resources to your configuration.

If you import a setup with non-default rules, these rules will be included in your configuration only if you have permission to create rules. You have this permission if the TASKE administrator has enabled Advanced Desktop Options for your account. Contact your TASKE administrator for more information.

To export a setup:

1. Click **File, Export**.
2. Go to the location where you want to save the setup file.
3. Type a name for the setup file and click **Save**.

   Setup files must use the .xml filename extension.

To import a setup:

1. Click **File, Import**.
2. Go to the location with the setup file.
3. Double-click the setup file.
4. Click **Yes**.

Configuring Notification Displays and Sounds

TASKE Desktop displays notifications and plays sounds based on rules that you define. For example, you can create a rule that plays a sound or displays a notification when an alarm occurs.

When you do not want to be disturbed, such as when you take an ACD call, you may want to mute sounds played for rules or turn off notifications. You can unmute sounds or turn notifications back on when you have finished the call.

Notification windows appear for 5 seconds, by default. You can change the default time that the notification window is displayed. Notification windows keep track of their last position. If you move a notification window, it will appear in that position the next time it is displayed.

To turn sounds on or off:

- From the Tools menu, select the **Mute Sounds** check box. When a check mark appears in the box, sounds are turned on.

To turn notifications off:

- From the **Tools** menu, deselect the **Show Notifications** check box. When a check mark appears in the box, notifications are turned on.

If TASKE Desktop is closed to the Windows taskbar, you can quickly turn sounds or notifications on and off by right-clicking the application's icon in the taskbar and selecting or deselecting the **Mute Sounds** check box or the **Notifications** check box.

To configure the length of time the notification window is displayed:

1. Click **Tools, Options**.
2. Type the number of seconds to display the notification window in the box below the **Show the notification window** check box.

   For convenience, you can turn off notifications at the same time as you change the display time. Deselect the **Show the notification window** check box to turn off notifications.

Chapter 3 Setting Up Queues and Agents

This chapter describes how to customize the queues and agents that you want to monitor.

Adding Resources

Desktop gives you an easy way to monitor the status of agents, queues, and queue groups in the call center. You add the resources that you want to monitor.

Agents that you choose to monitor are displayed on the Agents tab. By default, agents are listed in a table view and grouped based on their queues or queue groups. As well, all statistics and other agent information are displayed. Among the options for customizing agents, you can change the view, the statistics and other agent information, and state colors and labels.

Queue and queue groups that you choose to monitor are displayed on the Queues tab. Among the options for customizing queue resources, you can change the statistics and their review period, and swap columns and rows.

To add a resource:

1. From the **Queues** or **Agent** tab, click the **Add** button.

   You select queues and queue groups to add the agents who belong to those queue resources.

   Alternatively, you can right-click the resource list on the tab and click the **Add** option.
2. Select the check boxes for the resources you want to add.
3. Click **OK**.

Tip: If you add more resources than can be shown in the window, you can scroll the display. When scrolling horizontally, the first column always remains visible. When scrolling vertically, the first row always remains visible.

Changing Resource Labels

Labels for resources may include the resource ID, name, and nickname. For example, the labels used by default for an agent look similar to this:

641 Nikki Vars (Nikki)

You can choose which of these labels to display, as well as the order in which they appear. For example, to save space on your screen, you may want to display only the name of resources.

To change resource labels:

1. Click **Tools, Options**.
2. On the **Queue** tab or the **Agent** tab, select the check boxes for the labels you want to show.
3. If you want to change the order of the selected labels, click a selected label and drag it to its new position.
4. Click **OK**.

Arranging Columns and Rows

On the Queues tab, columns represent queues and queue groups, and rows show statistics, by default. On the Agents tab, columns represent agent information and statistics while rows show agents grouped by queues and queue groups, by default. You can change the order of columns on both the Queues tab and the Agents tab.

On the Queues tab, you can also swap rows and columns if you find it more useful to show statistics in the columns and queues in the rows. You can swap rows and columns back at any time.

To change the order of columns

- Click the column heading and drag it to the new position.

To swap rows and columns for queues:

1. On the Queues tab, click **View**.
2. Click the option that represents the information you want listed in the rows of the Queues list.

Changing the View of Agents

By default, TASKE Desktop displays agents on the Agents tab using a table. You can change the view to a state chart. A state chart organizes agents according to their current state (for example, idle, ACD, or unavailable).

In both table and state chart view, agent states are represented by colors. In table view, these colors are useful as a quick indicator of the agents you are monitoring or if you choose to hide the State column. For example, if you assign the color red to the ACD state, and TASKE Desktop shows mostly red agent states, then calls may start to back up in queues. If you prefer different colors than are used by default, you can change the color associated with each agent state.

You can also change the labels used to identify states.

Depending on the reasons for monitoring agents, you may want to show or hide agents in logged out or unknown states. By default, these agent states are not included in the display on the Agents tab.

To change the agent view:

1. On the Agents tab, click the **View** button.
2. Click **Table** or **State Chart**.

To configure options for viewing agent states:

1. Click **Tools, Options**.
2. If you want to show agents in logged out or unknown states, on the **Agent** tab, select the **Show agents in logged out state** check box or **Show agents in unknown state** check box.
3. If you want to change the labels or colors that represent agent states, click **Agent State Properties**.
4. For each label you want to change, click the label, press any key, and type the new label.

   Tip: To revert a label to its default name, click the label, press any key, delete the label, and press Enter.
5. For each color you want to change, click the color box and click the new color.
6. Click **OK**.

Sorting Agents

You can sort agents in the Agents tab by label (name, ID, or nickname) or state (for example, idle, ACD, or unavailable).

Lists can be sorted in ascending or descending order. When you sort a list, TASKE Desktop always applies ascending order.

To sort agents:

1. On the Agents tab, click **View, Sort**.
2. Click **By Status** or **By Label**.
3. Click **View, Sort**.
4. Click **Ascending** or **Descending**.

Chapter 4 Using Queue and Agent Statistics

This chapter describes how to customize the statistics for your queues and agents.

Choosing Queue Statistics

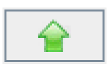
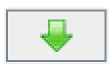
By default, all statistics are shown for queue resources on the Queues tab. You can change the statistics shown, their order, and their names.

By default, statistics reflect values for the current day, starting from midnight. If you are interested in statistics over a different timeframe, you can change the review period.

For a description of the queue statistics, see Queue Statistics.

To set up queue statistics:

1. Click **Tools, Options**.
2. On the **Queue** tab, click the review period for statistics.
3. Select the check boxes for the statistics you want to show and deselect the check boxes for statistics you want to hide.
4. If you want to change the order of the selected statistics, click the statistic's row and use the **Up** button or **Down** button to move the statistic to its new position.

   *Up button*  *Down button*

5. If you want to change the name of a statistic, double-click the statistic name, type the new name, and press the **Enter** key.

   To return a statistic to its default name, double-click the current name, delete the name, and press the Enter key.

6. Click **OK**.

The Toggle button is a convenient way to quickly invert the selection of multiple statistic check boxes. Control+click the name of each statistic and click the Toggle button.

*Toggle button*

You can quickly select all statistic check boxes using the Select All button.

*Select All button*

Choosing Agent Information and Statistics

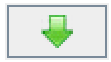
For each agent shown on the Agents tab, a set of columns provides information about the agent's current activity, such as the agent's current state and the length of time the agent has been in that state.

Columns also display statistics for activity over the past hour. For example, the ACD Calls Answered statistic shows the total number of ACD calls the agent has taken in the past hour. For a description of the agent statistics, see Agent Statistics.

You can change the columns displayed, the order of the columns, and the name of the activity content or statistic.

To change agent columns:

1. Click **Tools, Options**.
2. On the **Agent** tab, select the check boxes for the columns you want to show and deselect the check boxes for columns you want to hide.
3. If you want to change the order of the selected activity information or statistics, click the row and use the **Up** button or **Down** button to move the content to its new position.

*Up button*  *Down button*

4. If you want to change the name of a column, double-click the statistic name, type the new name, and press the **Enter** key.

   To return a column to its default name, double-click the current name, delete the name, and press the Enter key.
5. Click **OK**.

The Toggle button is a convenient way to quickly invert the selection of multiple column check boxes. Control+click the name of each column and click the Toggle button.

*Toggle button*

You can quickly select all column check boxes using the Select All button.

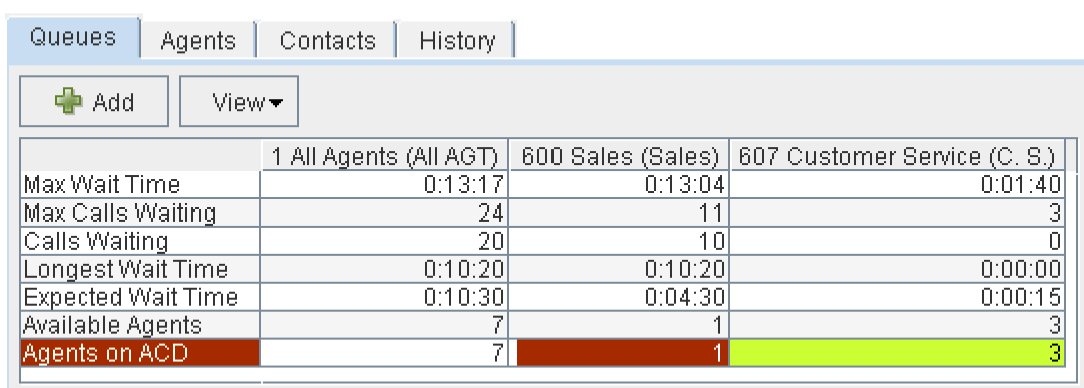
*Select All button*

Setting Alarms

Alarms notify you of conditions in the contact center that require attention. Two types of alarms can occur:

- one alarm indicating a situation that is outside of normal conditions. Typically, this type of alarm is referred to as a warning alarm.
- one alarm indicating a situation that requires immediate attention. Typically, this type of alarm is referred to as a critical alarm.

In this example, the Agents on ACD statistic shows a warning alarm (represented by the color green) and a critical alarm (represented by the color red). When both alarms are triggered for a statistic, the first cell in the row shows the color of the critical alarm. If only one alarm was triggered, the first cell would show the color that represents the triggered alarm.



	1 All Agents (All AGT)	600 Sales (Sales)	607 Customer Service (C. S.)
Max Wait Time	0:13:17	0:13:04	0:01:40
Max Calls Waiting	24	11	3
Calls Waiting	20	10	0
Longest Wait Time	0:10:20	0:10:20	0:00:00
Expected Wait Time	0:10:30	0:04:30	0:00:15
Available Agents	7	1	3
Agents on ACD	7	1	3

By default, no alarms are configured. You configure an alarm by defining the threshold value at which you want TASKE Desktop to trigger the alarm. In the previous example, the alarms have been configured such that the warning alarm is triggered when the number of agents is equal to 3 (or lower) and the critical alarm is triggered when the number of agents is 1 or lower.

To set an alarm for a statistic:

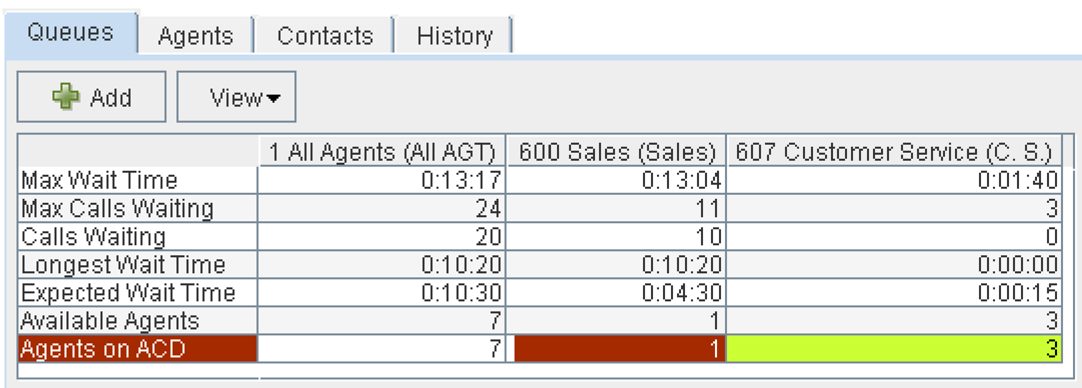
1. On the **Queue** or **Agent** tab, right-click in the resource list and click **Show/Hide Statistics**.
2. For the statistic, click the **Warning** cell or the **Critical** cell, depending on the alarm you want to set.
3. Type the threshold value that triggers the alarm. If you clicked the wrong cell, press the **Esc** key to exit the alarm selection.

   If you use both alarm types, the alarm with the highest value determines the more serious condition, giving you the flexibility to set the severity of a critical or warning alarm relative to each other.

   When the threshold value is blank, no alarm is configured.
4. Click **OK**.

Choosing the Colors and Display Mode for Alarms

You can set alarms that highlight when the value of a statistic is operating marginally or severely outside of an acceptable threshold. Here, the color green indicates that a value that is marginally outside of an acceptable threshold and the color red indicates a value that is severely outside of an acceptable threshold.



	1 All Agents (All AGT)	600 Sales (Sales)	607 Customer Service (C. S.)
Max Wait Time	0:13:17	0:13:04	0:01:40
Max Calls Waiting	24	11	3
Calls Waiting	20	10	0
Longest Wait Time	0:10:20	0:10:20	0:00:00
Expected Wait Time	0:10:30	0:04:30	0:00:15
Available Agents	7	1	3
Agents on ACD	7	1	3

You can choose the color used to represent each type of alarm (marginally or critically outside of the acceptable threshold). How TASKE Desktop uses the color depends on the display mode. Settings for the display mode are:

- Background color. As shown in the previous example, the cell background is displayed in the selected alarm color.
- Text color. The value in the cell is displayed in the selected alarm color. The cell background remains unchanged.

In addition to the background or text color setting, you can make the cell appear to "flash" using an "Alternate" setting. For example, if the background color is red and you select the Alternate option, the cell background alternates between white and red. The text color alternates between white and black to ensure that you can read the value regardless of the background setting.

Note: The flashing option is not available when using state chart view on the Agents tab.

To configure alarm properties:

1. Click **Tools, Options**.
2. On the **General** tab, for the **Display mode** box, click the option that represents whether you want to apply the alarm color to the cell background or text.
3. If you want the cell to appear to flash, select the **Alternate** check box.
4. If you want to change the color used for a warning or critical alarm, click the color box associated with that alarm and click the new color.
5. Click **OK**.

Chapter 5 Chatting with Contacts

This chapter describes how to communicate with Desktop contacts.

Setting Your Availability

There may be times when you are signed in to TASKE Desktop, but you do not want to be available for chats. You can indicate that you are not available, which prevents other users from initiating chats with you. When you are ready for chat sessions, make yourself available to other users.

To set your availability:

- On the Contacts tab, click the **Available** button and click **Unavailable**.

  The button changes from Available to Unavailable to show your current status. Click this button again and choose **Available** when you are once again ready for chat sessions.

Adding or Deleting Contacts

You can create a list of your own contacts. Any TASKE user can be added to your list. A default Broadcast user cannot be deleted from your list. This entry lets you send a message to all users who are currently signed in to TASKE applications.

In your contacts list, TASKE Desktop displays whether each user is available or unavailable. A user is unavailable if they are signed out or if they have set their availability to Unavailable.

Once you add a user to your list of contacts, they remain on the list until you delete them.

To add contacts:

1. On the Contacts tab, click the **Add** button.
2. Double-click each contact name and click **Close**.

To delete contact:

- On the Contacts tab, right-click a contact name and click **Delete**.

  If you want to delete more than one contact at a time, select the contacts and press the **Delete** key.

Sorting Contacts

You can sort your contacts by name or status, in ascending or descending order. For example, sorting contacts by status in ascending order lists your available contacts first.

To sort contacts:

1. On the Contacts tab, click the column header that represents the information you want to sort on (for example, Status).
2. If you want to reverse the order of the sorted information, click the column header again.

Sending or Receiving Messages

You can send a message to any user in your contacts list that is available. The Broadcast user is a special type of user. This entry lets you send a message to all users who are currently signed in to TASKE applications.

When another user sends you a message, the Chat window will appear on your computer monitor. Use this window to send your reply.

If you are logged in to two TASKE applications, you can send messages only from the application that you logged into first.

By default, your chat conversations are not saved. If you want to record a transcript of your chats, you must configure TASKE Desktop to save your chats.

To start a chat with another user:

1. On the Contacts tab, double-click the contact.
2. In the Outgoing message box, type your message and click the **Send** button.

To reply to a message you receive:

- In the Outgoing message box, type your message and click the **Send** button.

Saving Chats

By default, TASKE Desktop does not save the messages you exchange with a contact during a chat. If you want to save transcripts of the messages exchanged during chats, you must specify where you want them saved.

After you specify where you want chats saved, TASKE Desktop creates one transcript for each chat. Transcripts are stored in files with names that use the following format:

yyyymmddhhmmss.contact.log

For example, a transcript of a chat with sallysmith on November 15, 2007, at 11:01:00 is stored in a file with this name:

10071115110100.sallysmith.log

In addition to saving a transcript, TASKE Desktop creates an entry for the chat in the chat history available from the Contacts tab and an entry in the list on the History tab. By default, no entries are recorded in histories about chats.

To specify where you want chat transcripts saved:

1. Click **Tools, Options**.
2. On the General tab, select the **Save my chat conversations in this folder** check box.
3. If you want to change the default location, click the **Browse** button, select the new location, and click the **Open** button.
4. Click **OK**.

If you change the location where chat transcripts are saved, existing transcripts remain in the original location. Only transcripts for chats held after you change the location are saved to the new location. You can move the files for existing transcripts to the new location using Windows Explorer.

Deleting Saved Chats

You can delete saved chats when you no longer need to keep a transcript of the messages exchanged. Deleting saved chats makes more space available in the location where transcript files are saved.

You delete chats by removing the file that contains the chat transcript. Deleting a transcript file removes only your copy of the chat. If the contact you chatted with has configured TASKE Desktop to save chats, then the contact will have a transcript file of the chat.

When you delete a chat, TASKE Desktop removes the entries for the chat in the chat history available from the Contacts tab and in the list on the History tab. Removing these entries keeps these lists to a minimum length.

To delete a chat:

1. Go to the folder in which transcript files for chats are saved.
2. Delete the files that contain the chats you no longer require.

Viewing a Previous Chat

If you want to review a chat, you can access the transcript. For example, if you chatted with another agent about how to handle a call in the past and you receive a similar call, you may want to refer to the transcript for information about how you handled the earlier call.

If you remember the contact that you chatted with, you can access the transcript from your list of chat contacts. If you are unsure of the contact you chatted with, access the history of all chats to locate the transcript.

Important: You must first set up TASKE Desktop to save a transcript of your chats.

To access a chat from your contacts list:

1. From the Contacts tab, right-click a contact and click **View Chat History**.
2. Click the date of the chat you want to view.

   The transcript appears in the Chat session panel.

To access a chat from a history of all chats:

1. On the History tab, click the **View** button and click the period in which the chat occurred.
2. In the History list, click the **Type** column header.
3. Locate the entries where the type is "Chat session".
4. Right-click the chat you want to view and click **Properties**.

   The transcript appears in the History Details panel.

Chapter 6 Viewing Histories

This chapter describes how to access information about calls and chats you've held in the past.

Viewing Histories of Calls and Chats

You can view a history to see information about the calls and chats the calls and chats associated with your user name. The history is based on a review period you specify, such as the past seven days.

The history shows the date and time that each call or chat started and the type (for example, incoming answered ACD call, outgoing answered call, or chat session). For calls, the telephone number and location of the caller or the extension is also provided, if this information is available. For chat entries, the details identify the contact who participated in the chat.

Note: The history list includes entries for chats only if you have configured TASKE Desktop to save chats.

To view a history:

1. Click the **History** tab.
2. If you want to change the review period that the history includes, click the **View** button and click the period.

Sorting a History

You can sort a history by date and time, type, or details, in ascending or descending order. For example, sorting a history by type groups all chats, all outgoing answered calls, and so on.

To sort a history:

1. On the History tab, click the column header that represents the information you want to sort on (for example, Type).
2. If you want to reverse the order of the sorted information, click the column header again.

Viewing Properties

For any call or chat in a call history, you can view properties that provide more details. For calls, properties include information about the type of call and its start and end time. The properties also provide a description of the events that occurred from the start time to the end time. For example, you can see the trunk on which a call was received and the time that the call was moved from the trunk to a particular extension. If the call was abandoned, the time that the caller hung up is also available.

For chats, the properties include a transcript of the chat. For information about view chat transcripts, see Viewing Your Previous Chats

To view properties for a call:

- On the **History** tab, right-click the call and click **Properties**.

Chapter 7 Defining Rules

Rules provide a powerful way to stay on top of the activity in your contact center and manage your own status using TASKE Desktop. Using rules, you specify actions to take place when certain events occur. For example, you can create a rule that, when the number of available agents reaches a warning alarm state, an alert box appears that shows the message "More Agents Needed".

Rules can be highly customized to your own requirements. While every rule consists of an event and an action, the conditions that trigger events are defined by you. Similarly, the actions that occur based on events can be selected based on your preferences.

For example, one event that is available is that a summary statistic entered an alarm state. For this event, you specify the queue on which you want to monitor the statistic, the statistic itself, and the type of alarm. The action you choose to take place when this event occurs can be visual (a notification or alert that appears on your screen) or auditory (a sound that plays). The action can also perform some operation, such as opening an application or a chat window.

TASKE Desktop includes several default rules. You can copy these rules, change their order, and turn them off. You cannot delete or edit the default rules.

Rules are only in effect when you are signed into TASKE Desktop.

You can create non-default rules only if you have appropriate permissions. For information, contact your TASKE Administrator.

Examples of Rules

Rules reflect the events that are important to you and your preferences for handling these events. The best way to learn about the types of rules you can create is to look at some examples.

Note: TASKE Desktop includes several default rules that you can copy, reorder, or turn off. You can create non-default rules only if you have appropriate permissions. For information about your permissions, contact your TASKE Administrator.

Simple Rules

The simplest rules consist of one event and one action, as shown in this example:

> When I answer a call
> play c:\sounds\ring.wav

In this example, when you answer any call, TASKE Desktop plays the sound in the ring.wav file.

Hyperlinks in events and actions you choose indicate values that you can customize. In the previous example, the default action is:

> play a sound

When you see a hyperlinked value, simply click the hyperlink and you will be presented with the prompts necessary to define the value. In this case, the value is c:\sounds\ring.wav, which plays the ring.wav file when you answer a call.

Note: You can click hyperlinks in events and actions that you add to your rule definition. You cannot click the hyperlinks in the lists from which you select events and actions.

You do not have to customize all values. If a value is not specified, TASKE Desktop uses a default value, if possible. Because the example does not specify a call type for the value "call", the sound will play for every call.

Compound Rules

Rules may contain more than one event as shown in this example:

> When one of (649 Jenn Morgan (Jenn) or 650 John Smith (John) status enters a Logged Out state
> **or** when a summary statistic enters a warning state
>
> show an alert box with a 'Verify agents available in Customer Service'

When more than one event is defined, the specified action occurs if any of the events occur. In this example, you want to show an alert box when either of two key customer support representatives is logged out or when the number of available agents on the Customer Support Queue drops to a warning alarm level.

Note: In this case, the summary statistic hyperlink does not show the actual value defined.

Rules may also contain more than one action as shown in this example:

> When one of (649 Jenn Morgan (Jenn) or 650 John Smith (John) status enters a Logged Out state
> or when a summary statistic enters a warning state
> show an alert box with a 'Verify agents available in Customer Service'
> and play c:\sounds\alarm.wav

When multiple actions are specified, TASKE Desktop performs both actions when one or more defined events occur.

Advanced Options for Rules

TASKE Desktop provides several options for creating highly complex rules to meet most requirements for event processing. In addition to creating compound rules, you can arrange multiple rules in a specific order. In this way, a set of rules can work together to initiate different sequences of actions based on various conditions in your contact center.

You can use properties in combination with some types of actions. Properties act as placeholders for which values that will be substituted when the action is triggered. For example, assume that the value of the "open a URL" action is defined as follows:

> http://www.company.com?ani=[ANI]&dnis=[DNIS]&agent=[Agent ID]&queue=[Queue ID]

When the action is triggered, the web page that opens depends on the values of properties at that time.

For example, assume your company uses one DNIS for support and another DNIS for sales. You can define rules based on DNIS events such that if a customer calls support, TASKE Desktop opens a URL and looks up the customer's records (using the caller's phone number) in the in-house customer database. If a customer calls sales, then TASKE Desktop plays a sound and opens a different URL for collecting sales information from the customer.

Because you can create specialized actions for your environment, TASKE Desktop lets you save definitions as custom actions instead of redefining the same values each time you want to use a specialized action.

Creating Rules Using the Rules Wizard

TASKE Desktop includes several default rules that you can copy, reorder, or turn off. If you have appropriate permissions, you can create non-default rules. For information about your permissions, contact your TASKE Administrator.

To help you create rules, TASKE Desktop uses a Rules Wizard. The wizard guides you through the process of selecting events and actions, and helps you define any required values. For example, when you create a new rule, the wizard prompts you to:

- choose one or more one events (for example, "when I answer a call")
- choose one or more actions (for example, "play a sound")
- arrange the order in which actions will be triggered, if more than one action is defined in the rule
- define a name for the rule
- turn the rule on (optional)

Events and actions may include values that are identified using hyperlinks. For example, the following event triggers an action when any inbound call occurs, but you can click the hyperlink to specify only ACD calls or only non-ACD calls, among other properties.

When my phone rings with an inbound call

When a rule includes more than one action, the wizard lets you choose the order in which actions will be triggered. TASKE Desktop applies rules in the order they are listed, starting with the first action. If the sequence of actions is important, ensure that actions are listed in the appropriate order.

After you have chosen events, actions, and a rule name, the wizard gives you the option to turn the rule on. Turning a rule on means that TASKE Desktop starts monitoring your environment for an event defined by the rule. The next time an event occurs, the corresponding action is triggered. If you choose not to turn a rule on, the wizard creates the rule, but TASKE Desktop does not start monitoring for the event.

To create a rule:

1. Click **Tools, Rules**.
2. Click the **New** button.

   Tip: If the rule you want to create is similar to an existing rule, you may find it faster to copy and edit the existing rule, instead of starting a new rule. To create a new rule from a copy, click the **Copy** button, select the copy in the Rule list, and then click the **Edit** button.

3. Follow the Rules Wizard as it guides you through the steps to define the rule, and then click **Finish** on the last page of the wizard.

   Tip: When you add an event or action, it appears in the Rule Description text box at the bottom of the wizard. In this box, click hyperlinks to define values. The wizard will provide the appropriate prompts, depending on the value you are defining.

Defining Events

Every rule must include at least one event. An event includes at least one value that you can define, which is identified using a hyperlink. The following event includes three values:

When an agent or extension connects to an outbound call

For example, you can define this event such that when Ellen MacDonald or 123 connect to an ACD call, you want an action to occur.

The Rules Wizard helps define these values. For example, when you click a hyperlink where only one of two values can be selected, the wizard displays both values and lets you choose only one. In the case of the following event, the wizard displays a popup box with "Sign In" and "Sign Out" for your selection when you click the sign in/out hyperlink:

When I sign in/out TASKE Desktop

For other types of values, the wizard may display a list from which you can select one or more values. For example, the wizard displays a list of agents when you click the agent hyperlink and a list of extensions when you click the extension hyperlink in this event:

When an agent or extension connects to an outbound call

Building Call Filters

Many events are related to calls, as shown in this example:

When I answer a call

Like other event values, the Rules Wizard guides you as you define the call value. This value filters calls, looking for matches to values you specify. For example, you can define an event that looks for a call associated with extension ID equal to "123".

The Rules Wizard helps you build call filters using a property, comparator, and value. To build a call filter for extension ID "123", call filter values are:

Property	Comparator	Value
Extension ID	equal to	123

The following table shows other examples of call filters and their results:

Call Filter	Results
Queue ID in set 3000 3001 3300	These values match: 300 3001 These values do not match: 3002 40
Agent ID contains 03	These values match: 3033 103 These values do not match: 3000 1023

Call Filter	Results
DNIS starts with 2	These values match: 2000 23 These values do not match: 3200 122

Note: When typing values for the "in set" comparator, you can use any type of punctuation as a separator. This example uses a space, but you could use commas or a combination of commas and spaces, for example.

Defining Multiple Call Filters

You can define more than one filter for each call event. When multiple call filters are defined, a call must meet all the filter criteria for the action to occur. In the following example, a notification is displayed only if a non-ACD call takes place with an extension ID that starts with 3 on a queue with an ID of 2001:

> When I answer a non-ACD call (Extension ID starts with '3' and Queue ID = '2001') show notification window 'Inquiry from hardware support group'

Defining Actions

An action is triggered when an associated event is true. For example, a rule may define that when an ACD call is answered, your in-house technical support database opens, allowing you to search for information to assist the caller.

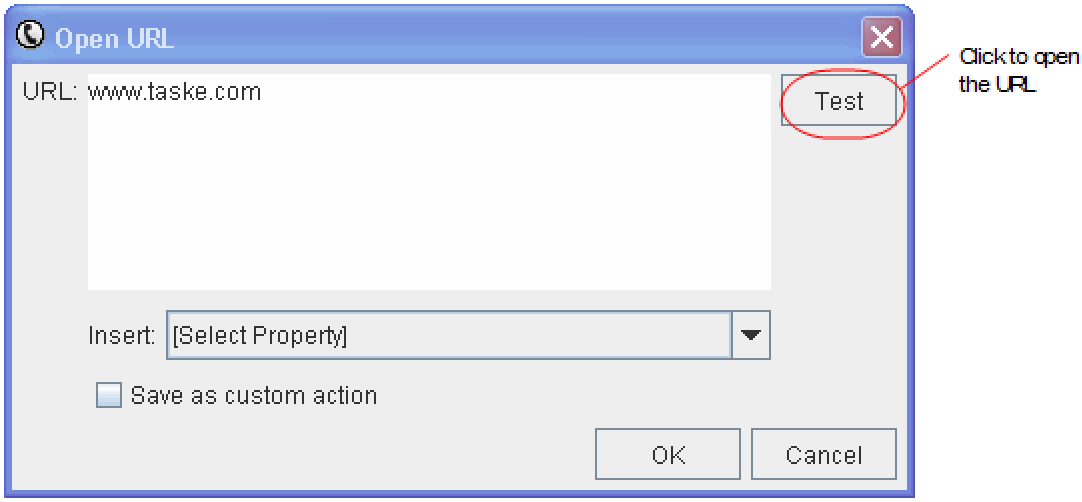
TASKE Desktop provides a set of default actions:

- open a URL that you specify
- open an application that is available to you
- play a sound that you select
- show a notification window with a message that you specify
- show an alert box with a message that you specify
- send an email to an address you select and with a message you specify
- start a chat with one or more contacts you identify

For notification windows and alert boxes, you specify a message that you want displayed. The difference between these two displays is that a notification window is a small window that appears on your screen for a few seconds, and then disappears. An alert box remains on your screen until you click its **OK** button.

For sounds and notification windows, you can configure whether they are turned on or off. For notification windows, you can also change the length of time notifications are displayed.

For URLs and applications, you specify the appropriate address or path. This example shows the Open URL dialog box that specifies the home page of TASKE Technology:



You can further define this URL using properties.

Inserting Properties for Actions

To help you define actions that are meaningful for your environment, you can insert properties that act as placeholders. When the action is triggered, a value is substituted for the placeholder. For example, the following message uses a placeholder for the queue ID:

> Add more agents to queue [Queue ID].

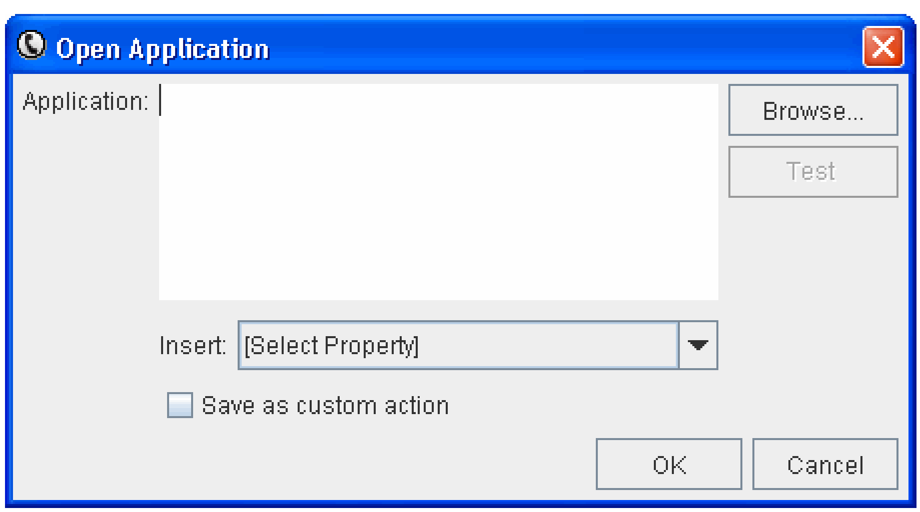
If this message is defined for a notification window, a specific queue ID will appear in the message when the notification window is displayed, as shown in the following example:

> Add more agents to queue 3004.

Properties let you define highly specialized conditions. For example, the following URL has been defined using properties to open a specific web page, depending on the values of properties when the associated event occurs.

> http://www.company.com?ani=[ANI]&dnis=[DNIS]&agent=[Agent ID]&queue=[Queue ID]

Available properties appear in an Insert list. This example shows this list in the Open Application dialog box:

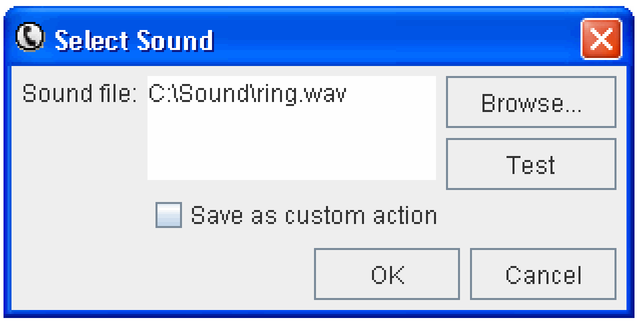


For a description of each property, see Rule Properties.

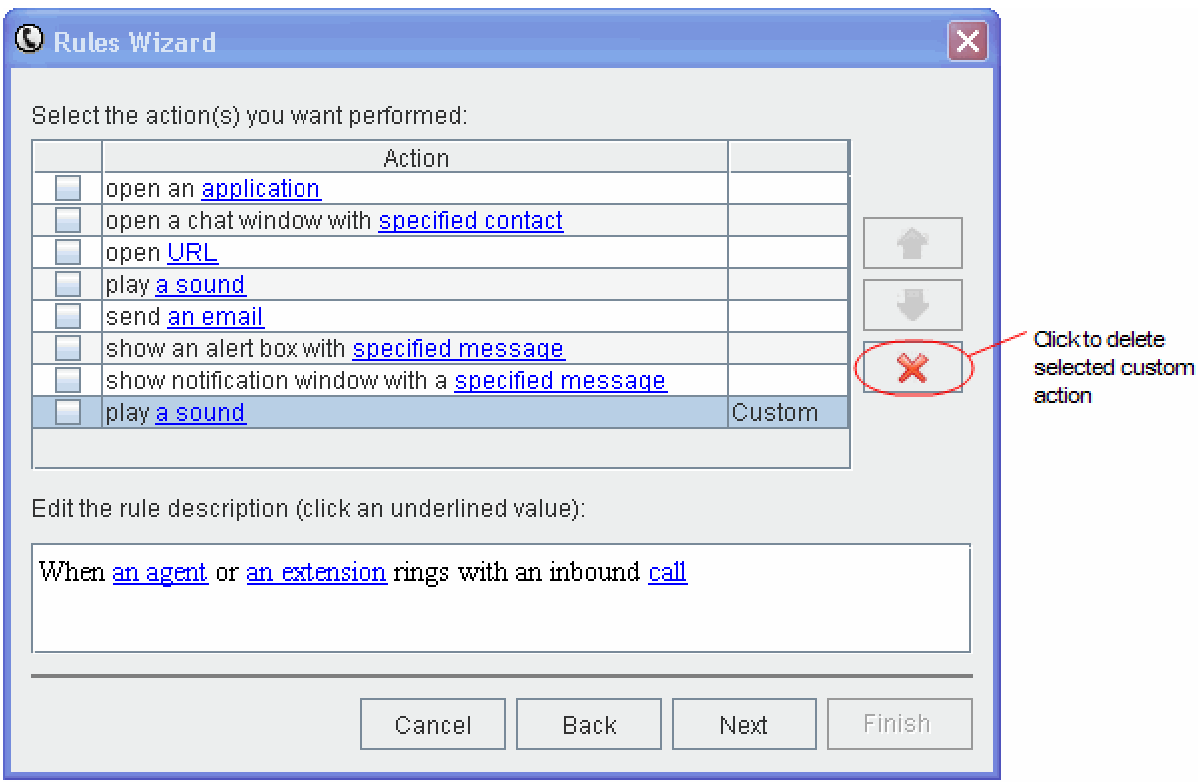
Saving Custom Actions

When you define a rule, you choose an event and an action. Defining a value for an action creates a custom action. For example, you can specify that, for the "play a sound" action, TASKE Desktop plays a c:\ring.wav file. The default action ("play a sound"), together with the selected sound file, is a custom action.

Save custom actions that you plan to use frequently so that you do not need to select and define the default action each time you want to use the action in a rule. When you can save an action as a custom action, a **Save as custom action** check box is available, as shown in this example:



After saving the custom action, you can select it from the list of available actions for use in the current rule, new rules you create, or existing rules you edit.



Deleting a custom action removes it only from the current rule. The custom action remains available for all other existing and new non-default rules.

Editing a custom action changes its value globally. For example, the value will be changed in rules that use the action, as well as any new rules created using the custom action.

Changing the Order of Rules

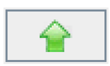
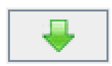
Rules are applied in the order they appear in the rules list, which is available from the Rules option of the Tools menu. To ensure that rules are applied with the results you expect, define rules to help you manage your work, but keep the number and complexity of rules to a minimum.

Rules are a powerful tool and overly complex rules can cause unexpected results. For example, assume that you create a rule that plays a five second sound file when you answer a call and then opens a URL based on the caller's phone number. When you answer a call, a sound will play for five seconds. Because the second action is not run until the first action completes, they delay may be too long before you have access to the URL. TASKE Desktop will not open the URL until the sound is finished playing.

To ensure that rules run as you expect, check the order of all rules when you create a new rule, copy an existing rule, delete a rule, or turn off a rule.

To change the order of rules:

1. Click **Tools, Rules**.
2. Click one or more rules that you want to move.
3. Click the Up or Down buttons to move the rule to the new position.

 *Up button*  *Down button*

Editing Rules

You may need to change the definitions of existing rules. For example, if a rule specifies an agent and that agent leave the company, you can edit the rule to remove the agent or specify a different one.

You cannot edit the default rules provided by TASKE Desktop.

To edit a rule:

1. Click **Tools, Rules**.
2. Click the rule in the Rule list and click the **Edit** button.

   Follow the Rules Wizard as it guides you through the prompts to edit the rule.

   Deleting a custom action removes it only from the current rule. The custom action remains available for all other existing and new non-default rules.

   Editing a custom action changes its value globally. For example, the value will be changed in rules that use the action, as well as any new rules created using the custom action.

Deleting Rules

You can delete any rule that you have defined if you no longer need it. You cannot delete the default rules provided by TASKE Desktop.

To delete a rule:

1. Click **Tools, Rules**.
2. Click the rule in the Rule list and click the **Delete** button.

Chapter 8 TASKE Support

This chapter describes how to contact TASKE Technical Support and the support options.

Contacting TASKE Technical Support

If you require information that is not addressed in this guide, you can contact TASKE Technical Support. If you are a member of the TASKE Total Care Maintenance Program, you are entitled to unlimited technical telephone support during TASKE support hours. If you are not a member of the program, you will be charged a per incident fee that must be paid in advance. If, within 30 days of closing the incident, you elect to purchase a subscription to the TASKE Total Care Maintenance Program, the incident fee will be refunded.

Use one of the following methods to contact TASKE Technical Support:

Telephone: 1-877-778-2753, Option "1 - Technical Support"

Email: www.taske.com/asksupport

TASKE support hours are **Monday to Friday, 9:00 am to 6:00 pm EST/EDT**. Canadian statutory holidays are excluded.

TASKE Total Care Maintenance Program

The TASKE Total Care Maintenance Program is designed for you to realize the greatest benefits from your investment, and protect this investment with regular product upgrades and access to technical support services.

Subscribers to the TASKE Total Care Maintenance Program receive the following benefits:

- Unlimited technical telephone support during TASKE support hours
- Access to current software releases and product updates at no charge.
- Access to TASKE training to further enhance the value of their software investment.

A twelve-month subscription to the TASKE Total Care Maintenance Program is included with every new purchase of the TASKE Management Solutions. Annual renewals or additional years' coverage can be purchased at any time.

The expiration date of the customer's current maintenance agreement is available by contacting TASKE at www.taske.com/asksales and providing the customer name and address (or lock number, if available).

For more information about this program, contact TASKE at 1-877-778-2753, Option "2 - Sales", or email us at www.taske.com/asksales.

Using the TASKE Support Package

TASKE technical support representatives may need to review your TASKE Desktop configuration and logged data to provide answers to your questions. To help collect this data, the necessary data files can be copied into a support package. This package is a .zip file named ttdsktop.config.zip, by default.

After creating the package, you send it by email to TASKE.

To copy data files to a support package (.zip) file:

1. Click **Help, Support Package**.
2. Note the location where the package will be saved, and click **Save**.

If you have not already contacted TASKE support about this issue, call us to discuss the best way to send this package to us.

Appendix A Reference

Status Information Details

The TASKE Desktop window shows the current state of the user who is logged in. You can view a brief or detailed description about the state.

The following two tables describe the content that appears for the detailed description of each state. The first table shows the content for each state when the user is logged in as an agent. The second table shows the content for each state when the user is not logged in as an agent.

For the brief description, only the first line of the detailed description appears. For example, the brief description for ACD calls uses this format:

user_name *state*: *duration*

Notes:

- For values that may show multiple queues, each queue is separated by a comma.
- Values that are unknown or not applicable are omitted. For example, the location value does not appear for calls from internal extensions.

Content for Status Information When Logged in as an Agent

State	Icon	Detailed Description
Idle		*user_name* *state*: *duration* Logged in to *queue_id queue_name (nickname)* x *extension_id* **Example:** John Smith Idle: 0:10:05 Logged in to 607 Customer Service (CS) x 641
Idle forward		
ACD		*user_name* *state*: *duration* from *phoneNum_or_extension_id_or_trunk_id* *agent_id agent_name (nickname)* *queue_id queue_name* (*nickname*) *location* x *extension_id* **Example:** John Smith ACD: 0:00:25 from (703)555-9011 641 John Smith (John) 607 Customer Service (CS) Virginia x 641
ACD on hold Non-ACD on hold		
Non-ACD		
Ringing		

State	Icon	Detailed Description
Outbound Outbound trunk		*user_name* *state*: *duration* to *phoneNum_or_extension_id* Agent *agent_id* on x *extension_id* *agent_id agent_name (nickname)* *location* *x extension_id* **Example:** John Smith Outbound: 0:01:35 to (908)555-8811 641 John Smith (John) New Jersey x 641
Outbound on hold		
Other states (for example, Unavailable, Not Ready, or Work Time)		*user_name* *state*: *duration* *agent_id agent_name (nickname)* *x extension_id* **Example** John Smith Not ready: 0:08:20 641 John Smith (John) x 641
Logged out Unknown		*user_name* *state*: *duration* *agent_id agent_name (nickname)* *x extension_id* **Example** John Smith Unknown: 0:10:20 641 John Smith (John) x 641

Content for Status Information When Not Logged in as an Agent

State	Icon	Detailed Description
Outgoing Outgoing trunk		*user_name* *state*: *duration* to *phoneNum_or_extension_id* *location* *x extension_id* **Example** John Smith Outgoing: 0:10:20 to (908)555-8811 Florida x 641
Outgoing on hold		
Incoming		*user_name* *state*: *duration* from *phoneNum_or_extension_id* *location* *x extension_id* **Example** John Smith Outgoing: 0:10:20 from (908)555-8811 Florida x 641
Incoming on hold		

State	Icon	Detailed Description
Other states		*user_name* *state*: *duration* *location* *x extension_id* **Example** John Smith Unknown: 0:10:20 Florida x 641

Queue Statistics

The following statistics are available for queues and queue groups.

Abandoned Calls

Calls in the queue that are disconnected by the callers before receiving an answer.

Agents Logged Out

The number of agents assigned to the queue, but who are logged out.

Agents On

The total number of agents idle, on ACD calls, non-ACD calls, and unavailable.

Agents on ACD

The number of agents currently on ACD calls.

Agents on Non-ACD

The number of agents currently on non-ACD calls.

Agents on Outbound

The number of agents currently on outbound calls.

Agents Unavailable

The number of agents assigned to the queue and logged in, but who are not available to take calls.

Answered by Group *n*

The percentage of calls handled by each agent group within the specified queue or queue group. Depending on the switch type, a queue or queue group can have one or more agent groups assigned to it.

Answered Calls

Calls in the queue that are answered.

Answered Service Factor (ASF)

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.

Available Agents

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.

Avg Abandon Time

The average time that calls waited before being terminated by the caller.

Avg Talk Time

The average time that an agent has spent on answered calls.

Avg Time to Answer

The average time that answered calls waited before being answered.

Avg Time to Interflow

The average number of calls removed from a queue and forwarded to another queue.

Calls Waiting

The number of calls currently waiting in queue.

Expected Wait Time

The length of time that calls are expected to wait in the queue before being answered.

Idle Agents

The number of agents assigned to the queue and available to accept ACD calls, but who are not currently on a call.

Interflowed Calls

Calls that exceed the threshold for waiting in a queue and move to another answering point.

Longest Wait Time

The length of time of the call currently in the queue that has waited the longest.

Max Calls Waiting

The highest number of calls in the queue at one time waiting to be answered.

Max Wait Time

The length of time that call waited the longest in the queue during the current review period before being answered or abandoned.

Maximum Time to Answer

The longest time that an answered call waited before being answered.

Offered Calls

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

Re-queues

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.

Telephone Service Factor (TSF)

The percentage of the calls offered to the queue that are answered or abandoned within the TSF time, which is determined by the administrator. 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.

Total Talk Time

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

Agent Information and Statistics

The following information and statistics are available for agents.

Note: Items identified by an asterisk are not statistics and alarms cannot be set for these items.

Avg *call_type* Time

The average amount of the time that the agent has spent on each call of a specified type. Call types include ACD, non-ACD and Outgoing.

call_type Calls

The number of calls of the specified type that the agent has taken in the last hour. Call types include ACD, non-ACD and Outgoing.

***call_type* Time**

The amount of the time that the agent has spent on non-ACD or outgoing calls in the last hour. For example, "Outgoing Time" indicates the amount of time the agent has spent on outgoing calls in the last hour. Call types include: Non-ACD and Outgoing.

Calling/Called

The telephone number of the party the agent is connected to.

Extension

The extension the agent is currently using.

***non_call_time* Time**

The amount of the time that the agent has spent on non-call activity in the last hour. For example, "Idle Time" indicates the amount of time the agent has been available and waiting to take ACD calls. Non-call time activities include Not Ready, Aux Work, DND, Work, Idle, and Unavailable.

State

The agent's current state.

State Character

The character that represents the agent's current state.

State Reason

The reason the agent is in the current state, if applicable. For example, an agent in the Unavailable state may provide the reason "training" or "lunch break".

Time in State

The length of time the agent has been in the current state.

Total ACD Time

The amount of the time the agent has spent on ACD calls in the last hour.

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	Definition
Unknown	The current state of the agent is unknown because no activity has been recorded since the Information Server was started.
Logged Out	The agent is not logged into the queue and is not available to receive ACD calls.
Idle	The agent is available and waiting to be offered an ACD call from the queue.
Idle Forwarded	The agent is available and waiting to be offered an ACD call from the queue. The agent has forwarded calls from the assigned extension to another extension.
ACD	The agent is on an ACD call from the queue.
ACD on Hold	The agent is on an ACD call0and has put the call on hold.
Non-ACD	The agent is currently on an inbound non-ACD call, meaning the call did not originate in the queue.
Non-ACD on Hold	The agent is currently on an inbound non-ACD call and has put the call on hold.
Outbound	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	The agent has initiated a call to a destination outside the contact center and is occupying an outbound trunk.
Outbound on Hold	The agent has initiated an outbound call and has put the call on hold.
Not Ready	Agent is not ready to accept an ACD call because the extension is off hook or in a transitional state.
Do Not Disturb	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.

State	Definition
Work Time	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	The agent's extension is currently ringing with an incoming ACD call from the queue.
Aux Work Time	The agent has entered the Work Time state for a specific reason. Each type of reason is represented by a code and the agent enters the code to enter the Auxiliary Work Time state.
Unavailable	The agent is logged into the queue but is in a state that prevents the agent from receiving ACD calls from the queue.

Rule Properties

The following properties are available for use in rules.

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.

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.

Agent ID

The identifier of the agent. This identifier is assigned by the TASKE administrator.

Queue ID

The identifier of the queue. This identifier is assigned by the TASKE administrator.

Extension ID

The identifier of the extension. This identifier is assigned by the TASKE administrator.

Call ID

The identifier of the call. This identifier is assigned by the telephone system.