MiContact Center Business Online Help for MiVB (9.3.3)

Mitel

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MiContact Center Business Online
Help for MiVB (9.3.3)

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Document version 9.3.3

WELCOME

MiContact Center Business Online Help for MiVB (9.3.3)

1. Welcome

Welcome to Mitel MiContact Center Business Version 9.3.3 Help.

This Help file provides detailed information on application functionality and use. To quickly locate information on a specific command/option, such as Enable enterprise presence and chat integration, click the Search button, type the command name, and click Search.

1.1. Welcome

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1.2. Getting Started

After MiContact Center Business has been installed on the Enterprise Server and clients, you can launch CCMWeb and configure user preferences and email contacts. All other client configuration is done at the administrative level and described in the *MiContact Center Business Installation and Administration Guide*.

Enterprise Server Installation and Upgrades

The following topics have been removed from the latest restructured Online Help as these topics are already available in the Installation and Administration Guide:

For complete details on the following topics, see theMiCCB Installation and Administration Guide .

- Enterprise Server Installation and Upgrades
- Configuration
- Services and Database Administration
- IVR Routing

- Remote Server Installation
- CTI Developer Toolkit
- Sales Force Integration
- Client Installation
- Client Configuration
- Data Mining
- Installing MiContact Center Business on VMWare

Setting up user preferences

You can change your preferences at any time. They are found in CCMWeb under My options. From this menu, you can:

- Specify your language preference
- Change your password
- View your security role properties
- Configure email contacts

Specifying your language preference

NOTE: MiContact Center Business applications, such as YourSite Explorer and Contact Center Client, all leverage the language settings of the operating system in addition to the language preference set for MiContact Center Business. Ensure that if you adjust the language settings of MiContact Center Business, you also adjust the language settings of your operating system to match.

To specify your language preference

1) Hover over **My options** and select **My preferences**.
2) After **Display this language**, select a language.
3) Click **Save**.

Changing your password

To change the password for your login

1) Hover over **My options** and select **My password**.
2) After **Old password**, type your old password.
3) After **New password**, type your new password.
4) After **Confirm new password**, type your new password.
5) Click **Save**.

Viewing security role properties

You can view your security role properties. They describe the application areas which you can access. Only employees with access to YourSite Explorer and whose security role permits managing security can change the security role properties of employees.

To view the security role properties associated with your login ID

- Hover over **My options** and select **My security role**.

Configuring email contacts

You can create a list of email contacts and email contact groups to whom you email reports. Contact groups can contain both user-configured contacts from MiVoice Analytics as well as all existing employees from YourSite Explorer.

To create a contact group

1) Add email contacts
2) Add contact groups
3) Add email contacts to the groups

Adding email contacts

To add an email contact

1) Hover over **My options** and select **Contacts > My email contacts**.
2) Click **Add**.
3) After **First name**, type the first name of your contact.
4) After **Last name**, type the last name of your contact.
5) After **Email address**, type the email address of your contact.
6) To save this contact, click **Save**.
7) To save this contact and add another contact, click **Save & Add**.

Adding contact groups

To add a contact group

1) Hover over **My options** and select **Contacts > My email contacts group**.
2) Click **Add**.
3) After **Name**, type the name of the contact group.
4) After **Description**, type the description of the contact group.
5) To share this contact group with other CCMWeb users, select **Shared Contact Group**.
   A shared contact group can be viewed, used, and edited by other users.
6) To save this contact group, click **Save**.
7) To save this contact group and add another contact group, click **Save & Add**.

Adding email contacts to contact groups

To add an email contact to a contact group

1) Hover over My options and select **Contacts > My email contacts group**.
2) Click **Members** for the contact group with which you want to associate agents.
3) If you want to add members from your contacts configured in CCMWeb, click **Contacts**.
   *If you want to add members from the employees configured in YourSite Explorer, click **Employees**.*

Both contacts and employees can be added to the same contact group.

4) Under **Available contacts**, select the check boxes of the members you want to add to the group and click **Add >>**.

1.3. Ignite

Ignite is used by agents to handle all types of media, including voice, email, chat, SMS, and open media.

NOTE: The Desktop Ignite application is not supported on MiCC Business for Open SIP. Agents must use Web Ignite for all agent functionality.

Ignite is available as either a desktop or Web version. They share much of the same functionality but also offer unique agent and supervisor experiences enabling you to choose the application that suits your individual needs. In our documentation, we refer to desktop Ignite and its features as Ignite (DESKTOP) and Web Ignite and its features as Ignite (WEB) or, where appropriate, as DESKTOP or WEB only.

If you want access to the following features, we recommend using Ignite (DESKTOP):

- Fully supported integration with MiCollab Client, including:
  - State indicator collaboration (state changes in either Ignite or MiCollab are reflected in each application)
  - Ability to dock Ignite to MiCollab Client and minimize/maximize both applications simultaneously
  - Auto-logout from MiCollab Client when agent logs out of Ignite
  - Recording and implementing pre-announce and agent greetings
  - Requesting help from other agents or supervisors while on a call
  - Viewing agents' Inbox contents
  - Being notified by email of Enterprise Server alarms
  - Using the ‘Next Longest button’ to access longest-waiting Chat and SMS interactions with a single click
  - Grouping, sorting, and organizing interactions using the card and grid views

If you want access to the following features, we recommend using Ignite (WEB):

- Accessing Ignite from any supported, Web-enabled device
  - Full support for tablets (Apple, Android, and Microsoft)
  - Partial support for mobile phones (Apple, Android, and Microsoft), including the ability to log in and out, view dashboards, change ACD state, set and remove Make Busy and Do Not Disturb, remove Work Timer, and interact with agent states via dashboards
- Viewing multiple windows simultaneously to enable greater, immediate access to different types of information
- Switching between desktop, tablet, and mobile device, while maintaining consistent access to all relevant information
- Logging into Ignite, without necessarily being available in queues, enabling employees to access Ignite without being presented with ACD calls

- Accessing supervisor-light version of Contact Center Client's Interactive Contact Center capabilities, including interacting with agent states and agent group presence, and moving interactions from queues to agents, based on agent availability and queue activity levels

NOTE: Using MiCollab Client in conjunction with Ignite, to handle voice interactions, but without integration functionality, such as collaborative state updates, docking, minimizing/maximizing together, click to IM other agents and supervisors, and MiCollab Client auto-logout when logging out of Ignite

The following sections describe Ignite's functionality and include procedures for working in Ignite, with a focus on non-voice media types. If your contact center also handles voice interactions, we recommend implementing the MiCollab and Ignite integration described in the *MiContact Center Business User Guide*.

Getting started with Ignite (WEB)

The following sections provide a walkthrough of Ignite's interface. While this section contains some procedures for viewing and orienting Ignite, agents can access in-depth information on how to use Ignite by following the cross-references throughout.

Logging into Ignite (WEB)

Launch the browser and sign into the application to log into Ignite. See *"Signing into and out of Ignite (WEB)"*.

NOTE:

- The intended users of Ignite (WEB) are employees connected either locally on the LAN or to the network via VPN.
- Ignite (WEB) does not support Compatibility Mode.
- Ignite (WEB) requires JavaScript be enabled on your browser. For more information, consult your browser documentation.
- When configuring screen pop notifications to be used with Ignite (WEB), you can execute only web URLs. Direct file execution (for example, .EXE or .BAT files) does not work in Ignite (Web) as the browser considers it as a security risk.

Launch Ignite by typing the following URL into a supported web browser:

- **http://<EnterpriseServerName >/Ignite**

  OR
- **http://<EnterpriseServerIP>/Ignite**

  NOTE: If your system uses SSL, type 'https' in place of 'http' and insert a valid domain or FQDN in place of an IP address.

For a list of supported web browsers, contact your supervisor or system administrator. Ignite supports default browser configuration settings.

NOTE:

- We recommend that you do not use the Ignite (WEB) and Ignite (DESKTOP) applications simultaneously.

- Editing responses across multiple, open browsers simultaneously is not supported.
- If you are drafting an email response and change browsers, hit 'Refresh' to pull down your drafted content.

Signing into and out of Ignite (WEB)

NOTE: After signing into Ignite and becoming Available, you may be placed in Busy across all agent capabilities. This is an administrative configuration. To remove Busy, see *"Setting and removing Make Busy in Ignite"*.

Your default sign-in state is Offline. This means you are signed into Ignite but your ACD agents are logged out. You cannot receive ACD interactions until your state is Available. To change states, see *"Adjusting agent states in Ignite (WEB)"*.

If you are enabled for voice, you can set Ignite to log you into your phone. See ‘To sign into Ignite and log into the phone’, below. Otherwise, we recommend you log into your phone before signing into Ignite so that your agents may become Available.

Logging out of the phone or exiting MiCollab will only log out the voice agent (multimedia agents are not affected). Logging out of Ignite will log out all agents (voice and multimedia) and may requeue items in the Inbox, depending on administrative configurations. To avoid losing work on these items, agents should finish their replies or transfer inbox items to a queue before logging out.

The following procedures explain how to

- Sign into Ignite
- Sign into Ignite and log into the phone
- Sign out of Ignite

To sign into Ignite

1) Launch a supported web browser and type: **http://EnterpriseServerName>/Ignite**.

   OR

   http://<Enterprise Server IP>/Ignite.

   NOTE: If your system uses SSL, type ‘https’ in place of ‘http’ and insert a valid domain or FQDN in place of an IP address.

2) Enter your **Username** and **Password**.

   NOTE: If you use Windows Authentication, enter your DOMAIN\Username and your domain password.

3) Click **Sign in**.

   – You can set or change phone settings from Ignite’s Options page.

To sign into Ignite and log into the phone

NOTE:

- This feature is supported for hot desk and external hot desk agents only
- You can set or change phone settings from Ignite’s Options page.

1) Launch a supported web browser and type: **http://EnterpriseServerName>/Ignite**.

   OR

http://<Enterprise Server IP>/Ignite.

NOTE: If your system uses SSL, type ‘https’ in place of ‘http’.

2) Enter your **Username** and **Password**.

NOTE: If you use Windows Authentication, enter your DOMAIN\Username and your domain password.

3) Click **Sign in**.

4) On the **Log in to a phone** dialog window, specify your **Extension** and **PIN** (if applicable).

5) To log into your phone once your sign-in is complete, select the **Automatic login** checkbox and click **Login**.

NOTE:

- Clicking ‘Save’ dismisses the dialog window and signs you in as Offline. However, the phone information is saved to your profile and you are logged into your phone once your state is Available.
- Clicking ‘Cancel’ dismisses the dialog window and signs you in as Offline across all media types.

To sign out of Ignite

- Click your avatar and select **State > Log out**.

NOTE:

- Voice agents on active calls are not logged out until the call is complete.
- Directly closing the browser does not log you out of Ignite (Web); you must manually logout of Ignite (Web).

Reconnecting Ignite (WEB)

If Ignite experiences connectivity issues, a ‘Reconnecting’ message displays. If Ignite cannot reconnect within the time allotted, a ‘Connection lost’ dialog pops with the option to Reconnect.

Once the connection is reestablished Ignite refreshes and functionality is restored.

To reconnect Ignite

- Under **Connection lost**, click **Reconnect**.

Ignite Icons

Use the Ignite Web icons to perform actions on contacts, cases, and interactions. The icons are described in the the following table.

Table 1: Ignite icons (Sheet 1 of 4)

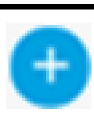
Icon	term
	Add

Table 1: Ignite icons (Continued) (Sheet 2 of 4)

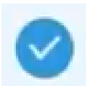
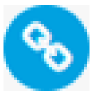
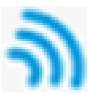
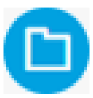
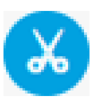
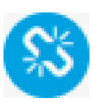
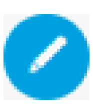
Icon	term
	Accept
	Apply Code
	Associate Participant
	Cases Inqueue
	Case
	Call
	Conference
	Cut from case
	Decline
	Dissociate Participant
	Edit
	Email
	Export to csv

Table 1: Ignite icons (Continued) (Sheet 3 of 4)

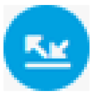
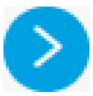
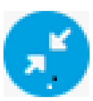
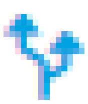
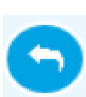
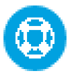
Icon	term
	Flag for follow up
	Follow up Calendar
	Forward
	Go to
	Hold
	Import Contacts
	Invite
	Junk
	Merge
	No Reply
	Pending
	Print
	Reply

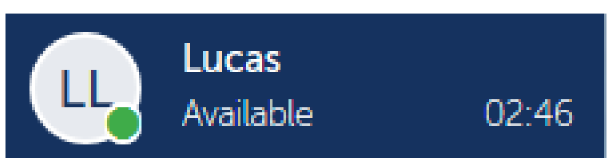
Table 1: Ignite icons (Continued) (Sheet 4 of 4)

Icon	term
	Reply All
	Request Help
	Resolve
	Send
	Swap
	Text
	Transfer

Avatar and agent state (WEB)

The avatar displays your agent avatar, your agent's first name, your current state, and how long you have been in that state. (See the following figure.)

Figure 1: Avatar and agent state



The color of the circle over the avatar indicates your current presence.

- **Green**—Indicates an Available state
- **Red**—Indicates an ACD or Do Not Disturb state
- **Yellow**—Indicates a Make Busy or Work Timer state, or that the agent is logged in, but not present in any of their agent groups
- **Blue**—Indicates that the agent is in a Non ACD state
- **Gray**—Indicates the agent is logged out or otherwise unavailable

If you have been enabled to adjust your agent group presence and agent state, you can click your avatar to both view and change your agent group presence or agent state. For information on your agent state, see *"Viewing agent state and state statistics (WEB)"*.

For information on changing your agent group presence and status, see *"Managing agent group presence and agent states"*.

For information on changing your avatar, see *"Your Ignite profile (WEB)"*.

Viewing agent state and state statistics (WEB)

The agent state section of the Avatar displays the employee's overriding state, including:

- **Ringing** – Displays when an employee has interactions ringing in the Inbox
- **ACD**– Displays when an employee is handling ACD interactions
- **ACD Hold** – Displays when an employee has placed ACD interactions on hold or have themselves been placed on hold during an ACD call
- **Non ACD** – Displays when an employee is handling Non ACD interactions
- **Non ACD Hold** – Displays when an employee has placed Non ACD interactions on hold or have themselves been placed on hold during a Non ACD call
- **Outbound** – Displays when an employee has placed an outgoing call
- **Outbound Hold** – Displays when an employee has placed an outgoing call on hold or have themselves been placed on hold during an Outbound call
- **Work Timer** – Displays after an employee has handled an interaction, provided none of an employee's agents are in an ACD, Non ACD, Outbound, Make Busy, or Do Not Disturb state
- **Do Not Disturb** – Displays when the employee is in a Do Not Disturb state
- **Busy** – Displays when an employee is in a Make Busy state
- **Away (Not Present)** – Displays when an employee is not present in any of their agent groups
- **Offline** – Displays when an employee is signed in, but their agents are logged out
- **Reseize Timer** – Displays when a call fails to route to an employee
- **Available** – Displays when an employee does not have inbound interactions in the Inbox

An overriding state is a state that supersedes other states. States higher in the list override the states appearing lower in the list. Note that all an employee's agents are considered when the system calculates the overriding state.

The oldest length for a state supersedes other times for the same state if an agent is handling multiple interactions. For example, if an employee had two emails in ACD, the displayed value in the status bar would be the time of the oldest email. When the oldest email is completed, the displayed value in the status bar would switch to the time of the other email.

Agent states by media are available in the Inbox. For more information, see *"Viewing agent handling statistics (WEB)"*.

Viewing agent state and state statistics (WEB)

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- **Non ACD Hold** – Displays when an employee has placed Non ACD interactions on hold or have themselves been placed on hold during a Non ACD call
- **Outbound** – Displays when an employee has placed an outgoing call
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- **Away (Not Present)** – Displays when an employee is not present in any of their agent groups
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Adjusting Agent Group Presence in Ignite

If agents have the required permissions, they can make themselves present in, or absent from, agent groups.

Adjusting Agent Group Presence enables agents to make themselves available or unavailable for interactions of different media types. For example, an agent belongs to the Sales (voice and chat) and the Training (email) agent groups. This agent makes herself available to answer only email interactions by becoming absent from the Sales group.

Agents can also make themselves available or unavailable to answer interactions of specific media types. For example, the agent makes herself available to answer only Sales voice interactions by becoming absent from chat in the Sales agent group.

Agents can also make themselves available or unavailable to all agent groups of which they are members, in one action.

DESKTOP - When agents are not present in any of their agent groups, Ignite's Status bar displays a 'Time Logged in Not Present' status. See *"The Status bar (DESKTOP)"* for more information.

WEB - When agents are not present in any of their agent groups, their state becomes Away (Not Present). See *"Viewing agent state and state statistics (WEB)"*.

NOTE: Agents may be made automatically present in their agent groups upon logging into Ignite, with multimedia interactions routing as soon as the login is complete. This is an administrative configuration and is not controlled by the agent. However, without this administrative configuration, agents must make themselves present in agent groups in order to be offered interactions.

The following procedures explain how to

- Become present to an agent group
- Become absent from an agent group
- Become either present in or absent from all agent groups
- Become available or unavailable to answer interactions of a specific media type
- Apply default Agent Group Presence settings (DESKTOP)

To become present in an agent group (DESKTOP)

1) In the **Sidebar**, click the **Agent Group Presence** button.
2) Select the group or groups from the **Agent Group Presence** screen and click **Apply**. Multimedia interactions begin routing.

To become present in an agent group (WEB)

1) Click your avatar and select **Agent Groups**.
2) Hover over the agent group's avatar and select **Join <Agent Group name>**.
3) Click **Update**.

To become absent from an agent group (DESKTOP)

1) In the **Sidebar**, click the **Agent Group Presence** button.
2) Deselect the group or groups from the **Agent Group Presence** screen and click **Apply**.

To become absent from an agent group (WEB)

1) Click your avatar and select **Agent Groups**.
2) Hover over the agent group's avatar and select **Leave <Agent Group name>**.
3) Click **Update**.

To become either present in or absent from all agent groups (DESKTOP)

1) In the **Sidebar**, click the **Agent Group Presence** button.
2) To become present to all agent groups, click **Select All**.
3) Click **Apply**.

   You become present in all agent groups and media types within the group.
4) To become absent from all agent groups, click **Clear All**.

5) Click **Apply**.
   You become absent from all agent groups and media types within the group.

To become either present in or absent from all agent groups (WEB)

1) Click your avatar and select **All Agent Groups**.
2) To become present in all agent groups, click **Join All > Update**.
3) To become absent from all agent groups, click **Leave All > Update**.

To become available or unavailable to answer interactions of a specific media type (DESKTOP)

1) In the **Sidebar**, click the **Agent Group Presence** button.
2) To become available to answer interactions of a specific media type, click the media icon in the agent group so the icon displays a blue background.
3) To become unavailable to answer interactions of a specific media type, click the media icon in the agent group so the icon displays a white background.
4) Click **Apply**.

To become available or unavailable to answer interactions of a specific media type (WEB)

1) Click your avatar and select **Agent Groups**.
2) To become available to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in blue.
3) To become unavailable to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in grey.
4) Click **Update**.

To apply default agent group presence settings (DESKTOP)

1) On the **Agent Group Presence** screen, click **Defaults**.
2) Click **Apply**.

Adjusting agent states in Ignite (WEB)

Agents can adjust their states to make themselves available or unavailable to receive ACD interactions without logging out of the application.

Agents can set the following states in Ignite:

- **Available**: Agents are logged into Ignite and their ACD agents are available to receive ACD interactions.
- **Offline**: Agents are logged into Ignite and can peruse the interaction repository, but their ACD agents are offline and cannot receive ACD interactions.

  NOTE: Time in Offline does not count towards shift duration.
- **Busy**: See *"Setting and removing Make Busy in Ignite"*.
- **Do Not Disturb**: See *"Setting and removing Do Not Disturb in Ignite"*.

To adjust your agent state

1) Click your avatar and select **State**.
2) Select a state

List pane (WEB)

Ignite's List pane displays the contents of folders selected in the Folders pane.

In the Inbox, the History, and the Queues pages, you can switch between Grid view and List view. In Grid view, all interactions for the selected page are displayed in a grid format.

Click **Grid** on the page to display interactions in Grid view.

NOTE: Grid view is not supported on mobile devices

The following procedures explain how to

- View data in each column
- Choose columns to display in the grid
- Restore data columns to the default view
- Change data column order
- Sort column data in Ascending or Descending order
- Remove Ascending / Descending sort
- Hide column(s) from grid
- Group column data by specific column headers
- Ungroup column data

To view data in each column

You can click anywhere on the row for that interaction to select an interaction, select the check box for that interaction. You can select multiple interactions. You can also customize the order in which columns appear in the grid. This allows you to view all the interaction properties at once and to sort or group by specific interaction properties.

To choose columns to display in the grid:

1) Select a page and in Grid view, click the **Show column chooser** button at the top-right of the grid. A list of available columns displays.
2) Click the columns you want to display in the grid. A **tick mark** against the column name indicates that it is selected, and an **X** mark indicates that it is not selected.

NOTE: An administrator can enable a custom variable in the YSE application by selecting the **Send to agent desktop** check box. For more information about custom variable creation, see *"Creating Custom Vari-ables"*.

To restore the grid data columns to the default setting

1) Click **Options > Customization**.
2) Under **Grid settings reset**, click the page button (i.e. Inbox, History, Queue) to reset.

To change data column order

- Drag and drop a column to the desired position.

To sort column data in Ascending or Descending order

- On the column header, click the drop-down arrow, and select **Sort Ascending/ or Descending**.

  The selected column's data are sorted in ascending or descending.

To remove ascending / descending sort

- On the column header, click the drop-down arrow and select **Remove Sort**.

  The column data are restored to the default.

To hide column(s) from the grid

- On the column header, click the drop-down arrow, and select **Hide Column**.

  The selected column is hidden from the grid.

To group column data by column headers

1) On the column header, click the drop-down arrow, and select **Group**.

   The selected column data are grouped.

2) Click **Expand** button to expand all rows of the grouped column data.

   NOTE: You cannot group the following column headers: Interaction Id, System Received, Action Time.

To ungroup column data

- On the column header, click the drop-down arrow and select **Ungroup**. The column data are ungrouped and restored to the default.

Dashboards

The Dashboards page enables you to customize different dashboard displays of information relevant to your agent. You can add the following widgets to a dashboard:

- Employee State
- Callback Request
- Queue Now
- Agent State
- Web Browser

For more information on creating dashboards, see *"Configuring Ignite (WEB) dashboards"*.

Inbox (WEB)

Ignite's Inbox displays all interactions currently handled by the employee, ringing the employee, drafts, as well as failed send and autoreply items belonging to the employee.

When there is an active interaction or draft in the Inbox, a red badge appears over the Inbox icon, indicating how many interactions and drafts there are in the Inbox.

When you select an interaction in Inbox, in addition to the handling options, you can quickly access the case details, notes, calls, all the participants of the case, other cases from the same customer, and URLs by using the corresponding tabs. This saves time when you are interacting with a customer. For more information about these tabs, see the *"Cases (WEB)"*.

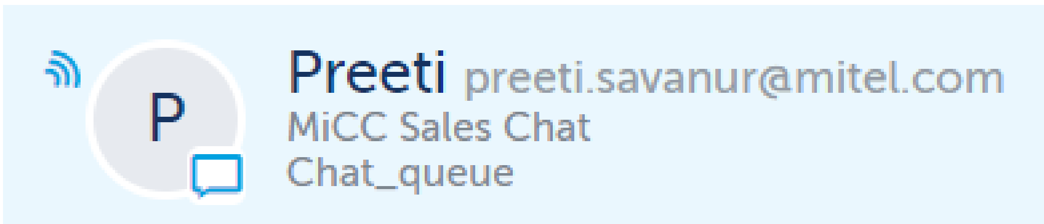
An agent can view any call's variable values that contain a URL under a separate tab, URLs. The URLs tab consists of a drop-down with all the variables and their associated value (URL). By default, the first URL is displayed in the frame. To open the URL in a new window, click **Open**.

Additionally, the Inbox displays current real time agent handling statistics. For more information, see *"Viewing agent handling statistics (WEB)"*.

Viewing interactions in Inbox (WEB)

Interactions in the Inbox provide you with relevant information for handling the interaction. (See the following figure).

Figure 2: Interaction in Inbox

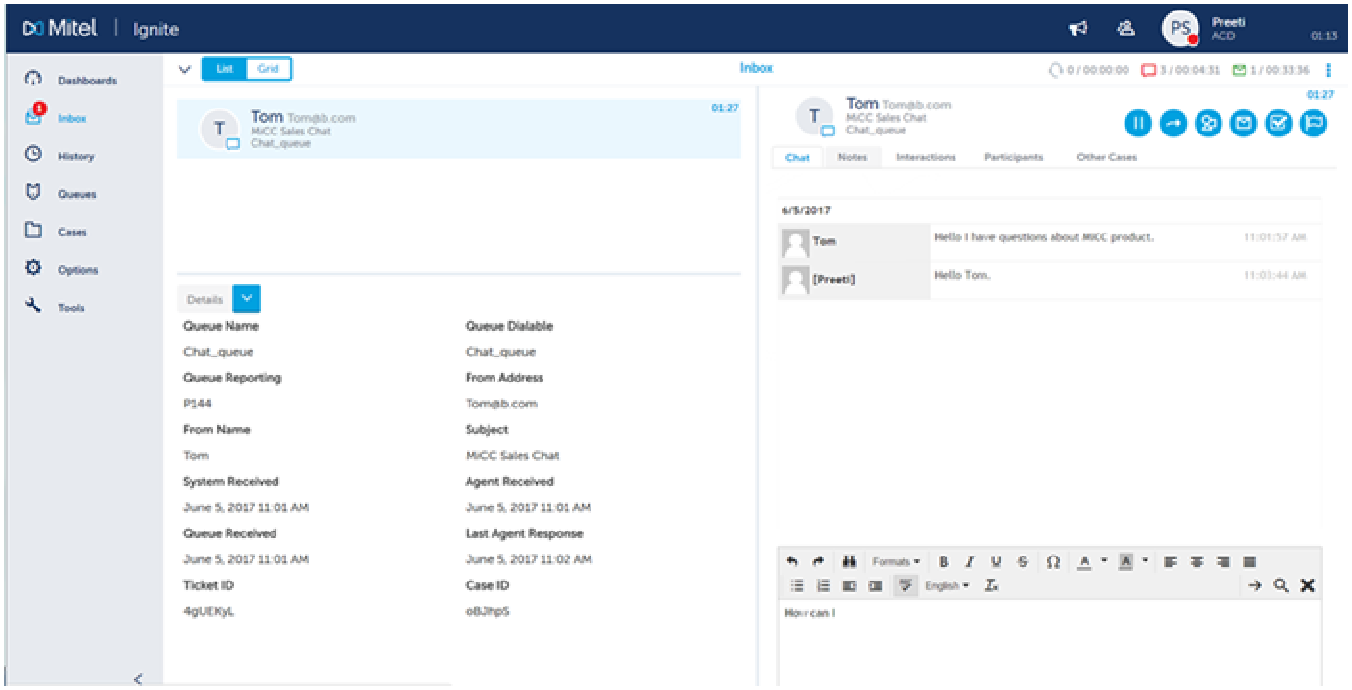


If the interaction is a draft, it will be labeled as such. When you select an interaction in your inbox, in addition to the handling options, you can quickly access the case details, notes, interactions, all the participants of the case, and other cases from the same customer by using the corresponding tabs. This saves time when you are interacting with a customer. For more information about these tabs, see the *"Cases (WEB)"*.

If an interaction consists of an URL, an agent can view the URL under a separate tab, **URLs**. The URLs tab consists of a drop down with all the variables and their associated value(URL). By default, the first URL is displayed in the frame. To open the URL in a new window, click **Open**.

You can choose to view the interactions in List view or in Grid view by clicking the respective option. Also, you can choose to view the case details in the additional pane that appears in the Inbox when you click the down arrow in the top header of the Inbox. (See the following figure).

Figure 3: Active interaction



You can expand or collapse the navigation pane using the **<** and **>** buttons.

Viewing agent handling statistics (WEB)

The Inbox contains agent handling statistics for each of the media types the agent handles. The following figure displays agent handling statistics across media types.

Figure 4: Inbox agent handling statistics (Average Handling Time)

Each media type's icon indicates the corresponding state of the employee's agents. The following table outlines the different states.

Table 2: Agent states (Sheet 1 of 3)

STATE	VOICE	CHAT	EMAIL	SMS	OPEN MEDIA	DESCRIPTION
Ringing						An ACD interaction ringing on an agent, waiting to be handled
ACD						An agent handling an ACD interaction
ACD Hold						An agent who has placed an ACD interaction on hold

Table 2: Agent states (Continued) (Sheet 2 of 3)

STATE	VOICE	CHAT	EMAIL	SMS	OPEN MEDIA	DESCRIPTION
Idle						An agent logged on and waiting to receive an interaction
Non ACD		--	--	--	--	An agent involved in an incoming Non ACD interaction or agent originated voice interaction
Non ACD Hold		--	--	--	--	An agent who has placed a Non ACD voice interaction on hold
Outbound		--	--	--	--	An agent on an outgoing voice interaction
Outbound Hold						An agent who has placed an outgoing voice interaction
Do Not Disturb						An agent who has activated Do Not Disturb and is not available to receive any ACD or Non ACD voice interactions
Make Busy						An agent who is not available to receive ACD interactions but can receive transferred interactions and voice interactions dialed directly to the agent

Table 2: Agent states (Continued) (Sheet 3 of 3)

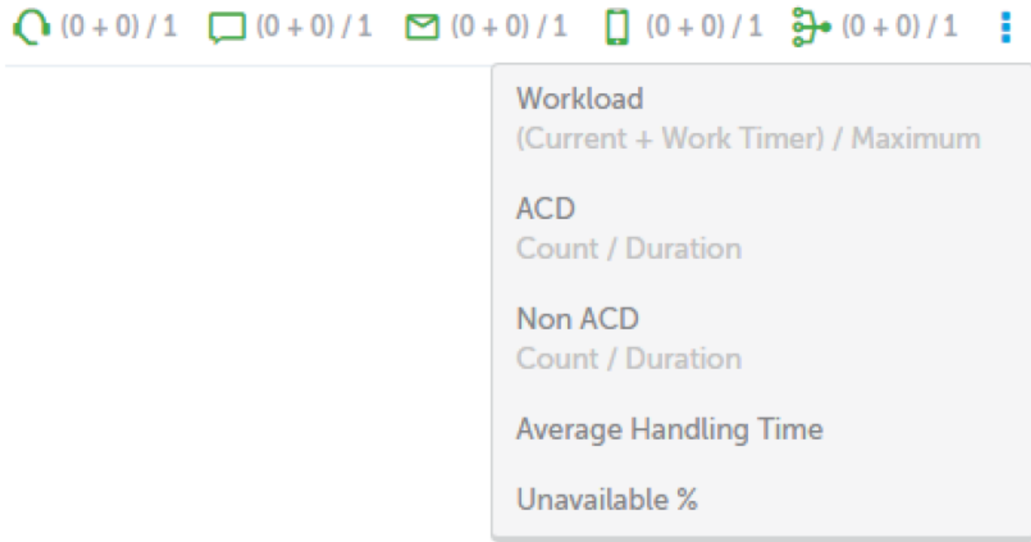
STATE	VOICE	CHAT	EMAIL	SMS	OPEN MEDIA	DESCRIPTION
Work Timer						An agent who is completing post-contact work, such as paperwork, and is unavailable to receive interactions of that media type
Offline						An agent unavailable to handle interactions
Away (Not Present)						An agent whose presence is removed from an agent group or media type

The Inbox offers five different types of handling statistics:

- **ACD (Count / Duration)** -- Displays the number of ACD interactions the agent has handled for a media type, and the time spent handling interactions of that media type
- **Non-ACD (Count / Duration)** -- Displays the number of Non ACD interactions the agent has handled for a media type, and the time spent handling the interaction
- **Average Handling Time (hours:mins:secs)** – The average time the agent has taken to handle interactions of each media type
- **Unavailable %** -- Displays the percentage of time the agent is unavailable during the shift, including Do Not Disturb, Make Busy, Unknown, and Work Timer states, and when the agent is logged in but not available to receive ACD interactions. (See the following figure.)

By clicking the More button, agents can change the statistics being displayed. (See the following figure.)

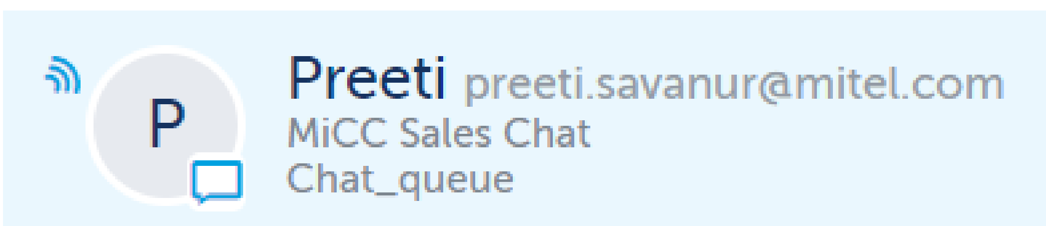
Figure 5: Inbox real-time statistics



Viewing interactions in Inbox (WEB)

Interactions in the Inbox provide you with relevant information for handling the interaction. (See the following figure).

Figure 6: Interaction in Inbox

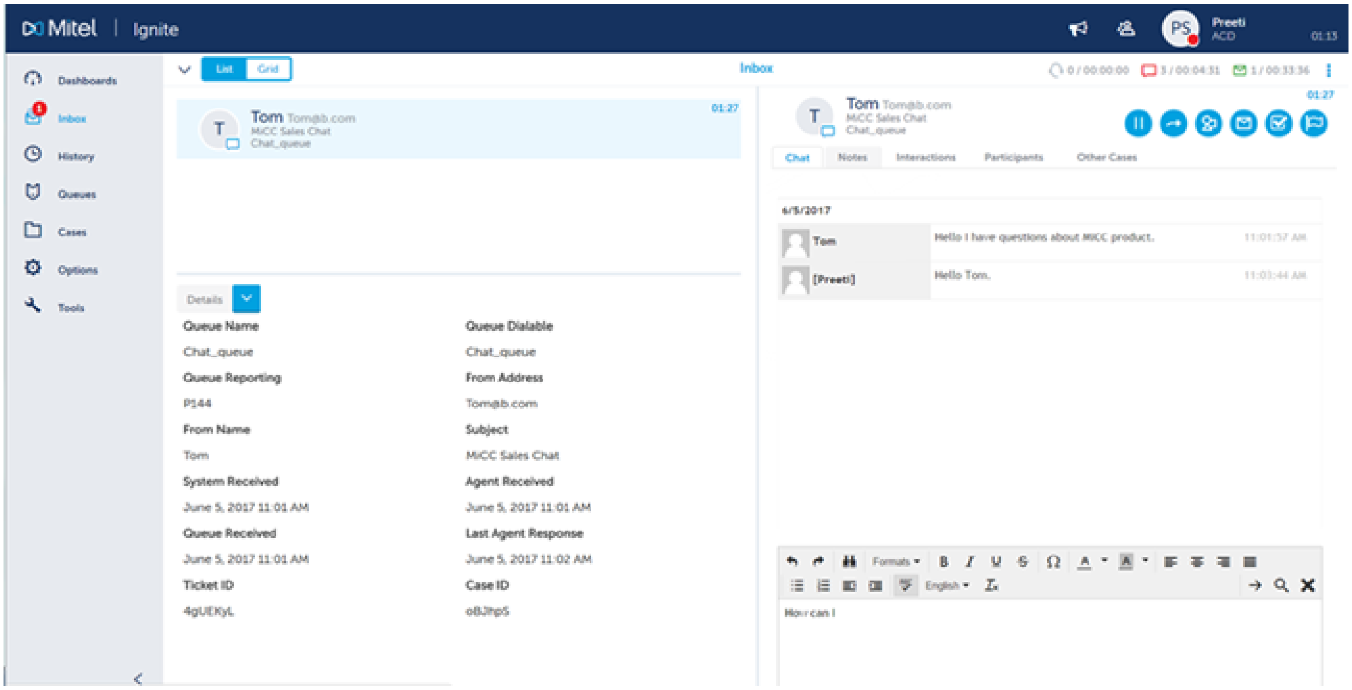


If the interaction is a draft, it will be labeled as such. When you select an interaction in your inbox, in addition to the handling options, you can quickly access the case details, notes, interactions, all the participants of the case, and other cases from the same customer by using the corresponding tabs. This saves time when you are interacting with a customer. For more information about these tabs, see the *"Cases (WEB)"*.

If an interaction consists of an URL, an agent can view the URL under a separate tab, **URLs**. The URLs tab consists of a drop down with all the variables and their associated value(URL). By default, the first URL is displayed in the frame. To open the URL in a new window, click **Open**.

You can choose to view the interactions in List view or in Grid view by clicking the respective option. Also, you can choose to view the case details in the additional pane that appears in the Inbox when you click the down arrow in the top header of the Inbox. (See the following figure).

Figure 7: Active interaction



You can expand or collapse the navigation pane using the **<** and **>** buttons.

Viewing agent handling statistics (WEB)

The Inbox contains agent handling statistics for each of the media types the agent handles. The following figure displays agent handling statistics across media types.

Figure 8: Inbox agent handling statistics (Average Handling Time)

Each media type's icon indicates the corresponding state of the employee's agents. The following table outlines the different states.

Table 3: Agent states (Sheet 1 of 3)

STATE	VOICE	CHAT	EMAIL	SMS	OPEN MEDIA	DESCRIPTION
Ringing						An ACD interaction ringing on an agent, waiting to be handled
ACD						An agent handling an ACD interaction

Table 3: Agent states (Continued) (Sheet 2 of 3)

STATE	VOICE	CHAT	EMAIL	SMS	OPEN MEDIA	DESCRIPTION
ACD Hold						An agent who has placed an ACD interaction on hold
Idle						An agent logged on and waiting to receive an interaction
Non ACD		--	--	--	--	An agent involved in an incoming Non ACD interaction or agent originated voice interaction
Non ACD Hold		--	--	--	--	An agent who has placed a Non ACD voice interaction on hold
Outbound		--	--	--	--	An agent on an outgoing voice interaction
Outbound Hold						An agent who has placed an outgoing voice interaction
Do Not Disturb						An agent who has activated Do Not Disturb and is not available to receive anyACD or Non ACD voice interactions
Make Busy						An agent who is not available to receive ACD interactions but can receive transferredinteraction s and voiceinteractions dialed directly to the agent

Table 3: Agent states (Continued) (Sheet 3 of 3)

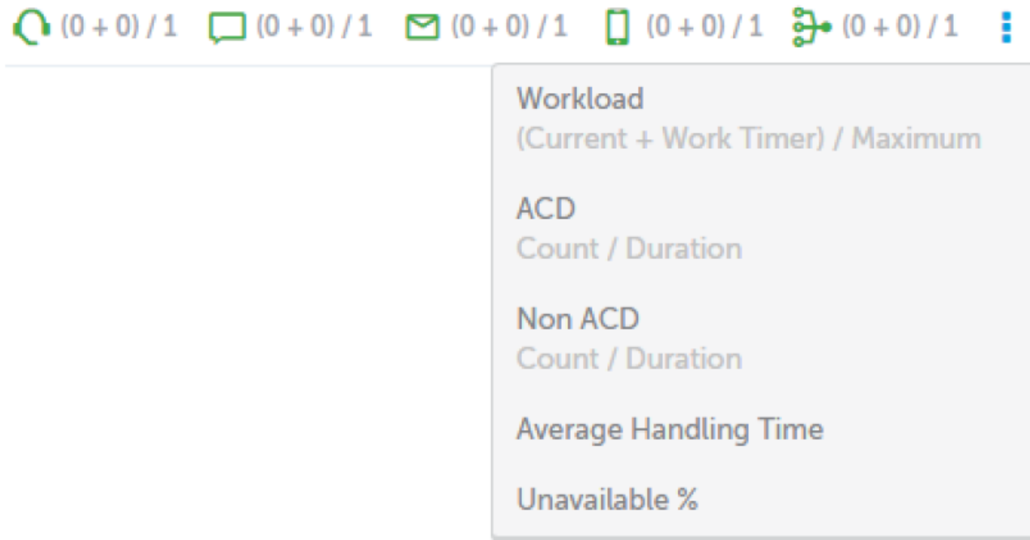
STATE	VOICE	CHAT	EMAIL	SMS	OPEN MEDIA	DESCRIPTION
Work Timer						An agent who is completing postcontactwork, such aspaperwork, and isunavailable to receive interactions of that media type
Offline						An agent unavailable tohandle interactions
Away (Not Present)						An agent whose presence is removedfrom an agent group or media type

The Inbox offers five different types of handling statistics:

- **ACD (Count / Duration)** -- Displays the number of ACD interactions the agent has handled for a media type, and the time spent handling interactions of that media type
- **Non-ACD (Count / Duration)** -- Displays the number of Non ACD interactions the agent has handled for a media type, and the time spent handling the interaction
- **Average Handling Time (hours:mins:secs)** – The average time the agent has taken to handle interactions of each media type
- **Unavailable %** -- Displays the percentage of time the agent is unavailable during the shift, including Do Not Disturb, Make Busy, Unknown, and Work Timer states, and when the agent is logged in but not available to receive ACD interactions. (See the following figure.)

By clicking the More button, agents can change the statistics being displayed. (See the following figure.)

Figure 9: Inbox real-time statistics



Queues (WEB)

Queues displays the queues and queue groups from which an employee's agent handles interactions. Queues groups the display by queues groups and queues. There are three kinds of queue groups:

- **Unified Queue Groups**—A collection of queues of different media types receiving interactions for a single service group. For example, a Unified Queue Group called 'Technical Support' can contain a voice, a chat, an email, and an SMS queue receiving tech support contacts.
- **Reporting Queue Groups**—A collection of queues, typically of a single media type, created for reporting purposes. For example, a collection of queues called 'Email Technical Support' can contain all email queues receiving tech support contacts.
- **Virtual Queue Group**—A collection of voice queues that offer calls to the same pool of agent groups, providing resiliency. For example, a collection of queues called 'Sales' can contain voice queues all routing calls to the same pool of agents handling sales calls.

Queues displays queues, both queues not associated to a queue group as well as queues belonging to queue groups. You can search for queues and queues to display or you can set queues and queue groups as favorites so that they always display when you go to Queues.

The Queues page contains a searchable archive of all calls sent to the queues for which the agent answers.

When you select a call in Queues, in addition to the handling options, you can quickly access the case details, notes, calls, all the participants of the case, other cases from the same customer, and URLs by using the corresponding tabs. This saves time when you are interacting with a customer. For more information about these tabs, see the *"Cases (WEB)"*.

An agent can view any interaction's variable values that contain a URL under a separate tab, URLs. The URLs tab consists of a drop-down with all the variables and their associated value (URL). By default, the first URL is displayed in the frame. To open the URL in a new window, click **Open**.

You can choose to view the interactions in List view or in Grid view by clicking the respective option. See the *"List pane (WEB)"*.

Viewing queue groups and queues (WEB)

You must be licensed to handle a media type to view queues of that media type. Supervisors must also be configured as agents answering for the queue in order to see its contents.

Agents can pin queues and queue groups as favorites so that your most handled queues are always readily available. By selecting a pinned queue or queue group in the Queues page, agents can view interactions in queue. Each queue and queue group indicate

- The number of agents available in each queue's answering agent groups. For reporting queue groups and unified queue groups, the total number of agents available for their component queues is displayed.
- The number of interactions in queue, or 'interactions Waiting', for the queue and the queue groups.
- The queue or queue group's Service Level percentage.

Agents can search for pinned queues and queue groups by keyword. Ignite displays all queues and queue groups matching the keyword. The search remains until you navigate away from the Queues page. You can sort search results and favorites by name or queue media type. Sorting by name sorts the queues and queue groups alphabetically. Sorting by media arranges queues in the order of Chat, Email, SMS, and Voice and sorts queue groups in the order of Unified, Virtual, and Reporting.

The following procedures explain how to

- Pin queues and queue groups as favorites
- Set queues and queue groups as favorites
- Sort queues by name
- Sort queues by media
- View Queues interactions

To pin queues or queue groups as favorites

1) Click **Queues**.
2) Click the **Select Favorite Queues** button.
3) Select the queues and queue groups you want to favorite.
4) Click **Save**.

To search for a queue or queue group

1) Click **Queues**.
2) In the **Search** field, enter the keyword.

To sort queues by name

1) Click **Queues**.
2) Click **Name**.

To sort queues by media

1) Click **Queues**.
2) Click **Media**.

To view Queues interactions

1) Click **Queues**.
2) From the queue groups, click the queue of your choice to view its interactions.
   A list of interactions for the selected queue is displayed.

NOTE: You can flip between **List** and **Grid** view.

3) Click the interaction of your choice to view its details in the right pane.
   NOTE: A Back link is available for you to navigate back to the Queues **page**.

Viewing queue groups and queues (WEB)

You must be licensed to handle a media type to view queues of that media type. Supervisors must also be configured as agents answering for the queue in order to see its contents.

Agents can pin queues and queue groups as favorites so that your most handled queues are always readily available. By selecting a pinned queue or queue group in the Queues page, agents can view interactions in queue. Each queue and queue group indicate

- The number of agents available in each queue's answering agent groups. For reporting queue groups and unified queue groups, the total number of agents available for their component queues is displayed.
- The number of interactions in queue, or 'interactions Waiting', for the queue and the queue groups.
- The queue or queue group's Service Level percentage.

Agents can search for pinned queues and queue groups by keyword. Ignite displays all queues and queue groups matching the keyword. The search remains until you navigate away from the Queues page. You can sort search results and favorites by name or queue media type. Sorting by name sorts the queues and queue groups alphabetically. Sorting by media arranges queues in the order of Chat, Email, SMS, and Voice and sorts queue groups in the order of Unified, Virtual, and Reporting.

The following procedures explain how to

- Pin queues and queue groups as favorites
- Set queues and queue groups as favorites
- Sort queues by name
- Sort queues by media
- View Queues interactions

To pin queues or queue groups as favorites

1) Click **Queues**.
2) Click the **Select Favorite Queues** button.
3) Select the queues and queue groups you want to favorite.
4) Click **Save**.

To search for a queue or queue group

1) Click **Queues**.
2) In the **Search** field, enter the keyword.

To sort queues by name

1) Click **Queues**.
2) Click **Name**.

To sort queues by media

1) Click **Queues**.
2) Click **Media**.

To view Queues interactions

1) Click **Queues**.
2) From the queue groups, click the queue of your choice to view its interactions.
   A list of interactions for the selected queue is displayed.

NOTE: You can flip between **List** and **Grid** view.

3) Click the interaction of your choice to view its details in the right pane.
   NOTE: A Back link is available for you to navigate back to the Queues **page**.

Tools (WEB)

In the Tools page, you can create a personal email reply template that can include plain text, images, or links to provide standardized email responses to common questions and requests. You can also insert variables in your reply templates, which can dynamically change their value depending on the email call's supplemental details.

Creating personal reply templates

You can create, preview, edit, and delete existing personal reply templates.

To create a personal reply template

1) Click **Tools > Email**.
2) To insert text, in the reply template editor, type or copy and paste the text.
3) To insert a variable, type the variable name in the following format: <<VariableName>>. You can insert multiple variables. In the email reply, Ignite replaces the variable with the actual value of the variable defined in YourSite Explorer (YSE).
   NOTE: The variable name used in the reply template must match the variable name defined in YSE and Send to agent desktop must be selected in YSE. Otherwise, the email reply will leave the text as it is enclosed within quotes. (that is, "<<VaribleName>>"). Consult with the system administrator to obtain a list of variables, from which you can choose the variables you want to insert in a personal reply template.
4) To insert an image, click **Insert picture** and browse to the image you want to insert.
5) To insert a link, click **Insert/edit link** and copy and paste the text for the link you want to insert.
6) Type the name you desire for the reply template.
7) Click **Save**.

To preview a personal reply template

1) Click **Tools > Email**.
2) In the reply template editor, click the **Browse** button.
   A list of personal reply templates displays.
3) From the list of personal reply templates, select the reply template you want and click **Preview**.

To edit a personal reply template

1) Click **Tools > Email**.
2) In the reply template editor, click the **Browse** button.
   A list of personal reply templates displays.
3) From the list of personal reply templates, select the reply template you want to edit and click **Open**.
4) Make changes to the reply template and click **Save**.
   *The **Save Personal Reply Template** window displays.*
5) To save changes to the selected reply template, click the template in the list, and click **Save**.
6) Click **OK** in the confirmation dialog.
7) To save changes to a different reply template, type the name of the reply template in the text field and click **Save**.
8) Click **OK** in the confirmation dialog box.

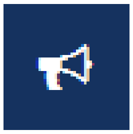
To delete a personal reply template

1) Click **Tools > Email**.
2) In the **Reply Template** editor, click the **Browse** button.
   A list of personal reply templates displays.
3) From the list of personal reply templates, select the reply template you want to delete and click **Delete**.
4) Click **OK** in the confirmation dialog box.

Feedback (WEB)

The Feedback button enables you to submit feedback and suggestions to Mitel. (See the following figure.) For information about submitting feedback, see *"Posting feedback and viewing our forums (WEB)"*.

Figure 10: Feedback button



Posting feedback and viewing our forums (WEB)

Mitel has partnered with UserVoice, a third-party service, to host customer suggestions on https://micontactcenter.uservoice.com. When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Our forums enable you to send feedback directly to the people building the product. While we cannot comment on every suggestion, feedback is analyzed and considered for future releases.

NOTE: Please do not use the forums to submit product defects. To submit product defects, please contact your administrator or dealer.

To post feedback and view our forums

- Click the **Feedback** button

  OR

  Access the following URL: https://micontactcenter.uservoice.com.

Handling Active and Ongoing Interactions

Handling multimedia interactions in Ignite

NOTE: To retain the integrity of Excel charts pasted in Ignite, first copy the Excel table to Word and then copy/paste it in Ignite.

Multimedia Contact Center supports skills-based routing. When an agent is available, they receive interactions based on the following criteria

1) Highest queue priority (optional)
2) Highest skill priority (optional)
3) Longest idle

Agents can handle multiple interactions at a time. However, an employee's Workload determines the number and type of media interactions that can be pushed to an agent at any one time. For example, agents may not be permitted to receive voice and chat interactions concurrently. Or, agents may be permitted to receive a maximum of five emails and two chats at one time.

When traffic levels necessitate, supervisors with appropriate licensing can log into Ignite and alleviate congestion by handling interactions. Emails can be configured to overflow to a supervisor after a specified length of time in queue. If a supervisor primarily uses Contact Center Client, they can minimize Ignite and be notified when they receive an overflow email.

If you are not being pushed interactions, it may be that you have reached the maximum number of interactions your Workload permits you to handle. For more information on viewing your Workload status, see *"The Status bar (DESKTOP)"*.

Note also that agents who have reached their Workload maximum for a media type can pick items out of queue and can receive transferred interactions of that type.

To provide context on how interactions reach queues and agents, this section explains

- Overflowing and interflowing interactions
- Routing models in Multimedia Contact Center
- Receiving notifications of new interactions

- Receiving information in screen pops

In addition, the following sections explain general interaction handling procedures, including

- Reviewing interaction history
- Tagging interactions with Account Codes
- Sending interactions back to the queue

For information on procedures specific to handling different media types, see *"Handling calls in Ignite"*, *"Handling emails in Ignite"*, and *"Handling chats in Ignite"*.

Transition from one interaction type to other can be done. For more information on Transition to other type, See *"Transitioning from one conversation type to another (WEB)"*.

Overflowing and interflowing interactions

The following section explains the concepts of overflow and interflow for multimedia interactions.

Once an interaction has reached a queue, it is offered to an agent group. Agents in the group are responsible for accepting the interaction. Interactions wait in queue until an agent from an assigned agent group accepts them. Overflow and interflow are two routing methods designed to reduce the length of time that interactions wait in queue

Overflowing interactions

Overflow is the process of offering an interaction, already offered to one agent group, to additional agent groups after the interaction has been waiting in queue past a set time. The amount of time before an interaction overflows is determined by an administrative configuration, and the system overflows the interaction without agent intervention.

Interflowing interactions

Interflow is the process of taking an interaction out of one queue and routing it to a different answer point, such as another queue or an external email address. Interflow is an administrative configuration occurring under specified queue conditions, and occurs without agent intervention.

Viewing and organizing Interactions in Ignite (WEB)

Agents can view, organize, and search for current interactions in Inbox and Queues. Agents can view and search for historical interactions in History.

In Inbox, agents can view interactions they are handling or are currently ringing them. For Queues, agents can view interactions sent to the queues for which the agents answer.

Employees licensed as Advanced supervisors or System Administrators may search all interactions in the History tab of Ignite. This search capability does not require the supervisor be licensed to handle multimedia.

For more information on Inbox, History, and Queues, see *"Inbox (WEB)"*, *"History (WEB)"*, and *"Queues (WEB)"*.

Selecting multiple email and SMS interactions in Ignite (WEB)

You can select multiple email and SMS interactions in Ignite to perform a single action on several items at once. For example, a supervisor can select multiple emails in queue and classify them all as ‘Junk’.

You can multi-select email and SMS interactions using either the Ignite (WEB) UI or Windows’ CTRL+ or SHIFT+ functionality.

Once multi-select is invoked, handling options and the option to select all items display.

NOTE: The option to multi-select displays only on the History and Queues pages.

The following procedures explain how to:

- Select multiple email and SMS interactions
- Select all email and SMS interactions on the page
- Deselect all email and SMS interactions on the page

To select multiple email and SMS interactions

1) Select either **History** or **Queues**.
2) Hover over the item avatar and select the check mark that displays. Repeat this step for any additional items.
3) Once multiple items are selected, at the top of the items list choose an action to perform.

   NOTE: On the History page you may only perform an action across items that failed to route.

To select all email and SMS interactions on the page

1) Select either **History** or **Queues**.
2) Hover over the item avatar and select the check mark that displays.
3) At the top of the items list, click the 'master' check mark.
4) Once multiple items are selected, at the top of the items list choose an action to perform.

   NOTE: On the History page you may only perform an action across items that failed to route.

To deselect all email and SMS;interactions on the page

1) Once multi-select is active, at the top of the items list, select the ‘master’ check mark. If all items are selected, disregard this step.
2) Once all items are selected, at the top of the items list, select the 'master' check mark.

Searching email, chat, and SMS history

Building a case history is an essential part of investigating situations that result from a customer complaint or a customer commendation. Searching email, chat, SMS, and open media history helps you to follow the trail of activity, enabling you to react appropriately in an informed way.

See *"Searching Ignite’s folders"* and *"Reviewing contact history"* for more information.

Accessing real-time monitors in Ignite (WEB)

Real-time monitoring of employees, agents, queues, and callback requests is available via the dashboards in Ignite (WEB).

For more information, see *"Configuring Ignite (WEB) dashboards"*, *"Accessing real-time information with (WEB)"*, and *"Interacting with agent presence to improve service levels"*.

Handling calls in Ignite

In addition to email, chat, SMS, and open media handling, you can handle calls in Ignite.

MiCollab Client is recommended for performing advanced call handling functions. For information about handling voice Interactions in MiCollab Client, see the *MiContact Center Business User Guide* .

The following procedures explain how to

- View call information
- Pick calls out of queue
- Answer and end calls
- Make calls
- Perform in-call actions

To perform other call handling functions such as conferencing and supervised transfers, agents must use Contact Center Softphone, PhoneSet Manager, MiCollab, or a hard set. See the appropriate sections in the *MiContact Center Business User Guide* for more information on Contact Center Softphone and PhoneSet Manager.

DESKTOP—For important information about logging on to and out of Ignite in conjunction with Contact Center Softphone, PhoneSet Manager, orhard sets, see *"Logging in and out of Ignite (DESKTOP)"*.

WEB—For important information about signing in and out of Ignite for voice agents, see *"Signing into and out of Ignite (WEB)"*.

NOTE:

- DESKTOP - Ignite provides call control for Inbound ACD interactions only. Agents must make outbound calls using Contact Center Softphone, PhoneSet Manager, or a hard set or use Web Ignite.
- DESKTOP - If your contact center focuses on voice interaction handling, we recommend that you implement the MiCollab Client and Ignite integration described in the .
- Ignite’s phone functionality does not support multiple lines.
- Ignite’s phone controls are not supported for External Hot Desking Agents.

Native call and Ignite interaction

Ignite does not support all call handling actions for native calls. Native calls are calls that bypass MiContact Center Business routing and Ignite, such as by an agent calling another agent directly using their desk phone or an external caller directly calling an employee extension. Native calls have full visibility for real-time monitoring and reporting in MiContact Center Business applications if an employee has their voice agent logged in while handling the native call.

The following table details what actions are available in Ignite depending on the action taken on a desk phone while handling a contact center routed call.

Table 4: Call control actions by desk phone for contact center routed calls

Call control action by phone	Actions displayed in Ignite						
	Hold	Remove Hold	Hang Up	Transfer	New Call	Invite for more People	Merge
Hold		X					
Remove Hold	X		X	X	X	X	
Hang Up							
Answer / Make Call	X	X	X		X	X	
Blind Transfer	X		X				
Supervised Transfer	X		X	X			
Conference							

NOTE: Using a desk phone's Park function with contact center routed calls will place the call on hold in Ignite.

The following table details what actions are available in Ignite depending on the actions taken on a desk phone while handling a native call.

Table 5: Call control actions by desk phones for native calls (Sheet 1 of 2)

Call control action by phone	Actions displayed in Ignite						
	Hold	Remove Hold	Hang Up	Transfer	New Call	Invite for more People	Merge
Hold							
Remove Hold	X		X				
Hang Up							
Answer / Make Call	X		X				

Table 5: Call control actions by desk phones for native calls (Continued) (Sheet 2 of 2)

Call control action by phone	Actions displayed in Ignite						
	Hold	**Remove Hold**	**Hang Up**	**Transfer**	**New Call**	**Invite for more People**	**Merge**
Blind Transfer							
Supervised Transfer	X		X				
Conference	X		X				

NOTE: Using a desk phone's Park function with native calls will remove the native call from Ignite's Inbox.

Viewing call information

You can view basic call information in Ignite before picking a call out of queue or handling it from the Inbox. Note that information displayed may vary based on administrative configuration.

The following explains how to

- View information for calls in queue
- View information for calls in the Inbox

To view information for calls in queue (DESKTOP)

1) In the **Folders** pane, select a queue.
2) In the **List** pane, select a call.
   Call information displays in the Preview pane.

To view information for calls in queue (WEB)

1) Click **Queues** and select the appropriate queue.
2) Select a call from the queue.

To view information for calls in the Inbox (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select a call.
   Call information displays in the Preview pane.

To view information for calls in the Inbox (WEB)

- Click **Inbox** and select a call.

Picking calls out of queue

Agents can pick calls out of queue and send them to the Inbox. Once ringing in the Inbox, the call can be answered.

NOTE:

- Agents cannot pick or pick and reply to interactions from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to interactions from the queue if they have the appropriate permissions.

To pick a call from the queue (DESKTOP)

1) From the **Folders** pane, select the queue from which a call will be picked.
2) From the **List** pane, select a call from the queue and, from the **Action** bar, click the **Pick** button.
   The call is transferred to your Inbox.
3) Pick up your desk phone to answer the call.
4) Answer the call using MiCollab Client.
5) To answer the call, select **Inbox** and, in the **List** pane, select the call and click **Reply**.
   NOTE: Additional handling options display in the Action bar. For more information, see the appropriate procedures in this section.

To pick a call from the queue (WEB)

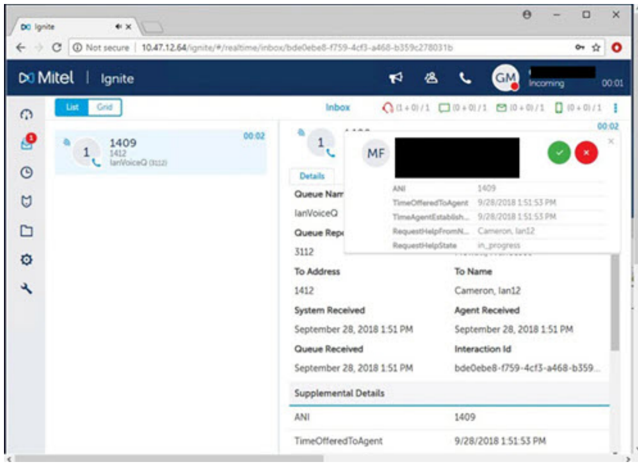
1) Click **Queues** and select the appropriate queue.
2) Select a call from the queue or hover over the item avatar and click **Pick**.
   The call is transferred to your Inbox.

Answering and ending calls

NOTE:

- You cannot explicitly decline a ringing call.
- Agents can request help from other agents, as well as from supervisors. When you answer an incoming request for help, the Ignite toaster displays "Request Help" and the name of the person requesting help. Accepted requests are entered in Silent Monitor mode. Supervisors must use Contact Center Client or their headsetto escalate to Coach mode.
- When supervisor receives an ACD help request and chooses to answer the call through Web Ignite, the call will be directly connected to the agent and the supervisor can coach the agent. Supervisor do not need to specifically press the **Coach** button on the desk phone to coach an agent.

For more information on silent monitoring, see the *MiContact Center Business User Guide*. For more information on the Request Help feature, see the appropriate section in this guide.



You can answer incoming calls from Ignite. Ignite displays a toaster for each incoming call and allows you to accept the call from the toaster.

When you answer a call, Ignite displays call information.

To answer a call (DESKTOP)

- In the Ignite toaster, click **Accept**, select the call in the **List** pane and, in the **Action** bar, click **Reply**.

To answer a call

- In the Ignite toaster, click **Accept**. Alternatively, select the call or hover over the item avatar and click **Accept**.

You can end calls from Ignite.

To end a call (DESKTOP)

- In the **Action** bar, click **Hang Up**.

  *Alternatively, in the **Conversation** window, in the bottom toolbar, click the **Hang Up** button.*

To end a call (WEB)

- Click **Inbox** and select a call or hover over the item avatar and click **Hang Up**.

Making calls

DESKTOP - We recommend you use MiCollab Client to make calls, although you can make calls using Contact Center Softphone or Contact Center PhoneSet Manager. This recommendation applies to internal and external destination calls, and calls to dialable queues.

DESKTOP — You can place a call in Ignite by either searching for a destination or entering the destination in the dial pad.

WEB — You can place a call in Ignite by searching for a destination.

To make a call (DESKTOP)

1) In the **Action** bar, click **New Call**.
2) In the **New Call** window, in the **Search** field, type the dialable number or the name of the employee to call. You can also click the dial pad button to enter numbers. Only voice-enabled employees can be searched for by name.

NOTE: The system supports partial matching on names and numbers. For example, if you type ‘12’, the system returns a list of employees whose IDs start with ‘12’.

3) In the **New Call** window, to the right of the destination, click the **phone** button to place the call. Note that the phone icon is disabled if the contact is an agent who is in DND.

   If the destination is available, the system places the call. The call is transferred to your Inbox and your desk phone rings. Answering the call connects you to the destination.

   If the call fails, a failure message displays in the New Call window.

To make a call (WEB)

1) Click **Contacts**.
2) If the destination is not a recent contact, type its name or number in the **Search** field.

   NOTE: You can also create external contacts or import contacts from the Contacts page. For more details, see "Contacts (WEB)" in this document.

3) Hover over the destination’s avatar and click **Call**.If applicable, hover over multiple Call avatars to select the appropriate dialable number. For calls to agents, a colored dot on the avatar indicates its availability.

   NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

Optionally, you can also make a call using the New Call button (Phone icon). You can choose the name and number that should be displayed on the external phone when making a call to an external destination.

To specify name and number when making calls

1) Click **New Call**, the **Voice Contacts** page is displayed.
2) Click the **From** button. The **From** page is displayed with all the CLIP (Calling Line Identification Presentation) numbers. The number with a bold font is your reporting number or the line URI.

   NOTE: The outbound CLIP numbers are populated from the DNIS device list in YourSite Explorer.

3) Select the number from the list. The customer sees the selected name and number on their display when they are contacted.

Performing in-call actions

While on active calls you can:

- Put calls on hold and retrieve calls from hold
- Tag calls with Account Codes.
- Tag calls with Classification Codes
- Transfer calls (DESKTOP)
- Initialize Conference calls
- Transition to alternate interaction types
- Merge calls (DESKTOP)
- Contact agents before transferring calls and requesting help

Putting calls on hold and retrieving calls from hold

At times, agents may have to put a call on hold. Ignite displays a paused icon over calls on hold so they can be easily identified.

NOTE: Calls on hold may not be transferred until hold is removed.

The following explains how to

- Put a call on hold
- Retrieve a call from hold

To put a call on hold (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select the active call.
3) In the **Action** bar, click the **Hold** button.

To put a call on hold in the Conversation window (DESKTOP)

- In the **Conversation** window, click **Hold**.

To put a call on hold (WEB)

- Click **Inbox** and select a call, or hover over the item avatar, and click **Hold**.

To put a call on hold (MiCollab Client)

- Click **Inbox** and select a call, or hover over the item avatar, and click **Hold**.

To retrieve a call from hold (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select the call on hold.
3) In the **Action** bar, click **Remove Hold**.

To retrieve a call from hold in the Conversation window (DESKTOP)

- In the **Conversation** window, click the **Remove Hold** button.

To retrieve a call from hold (WEB)

- Click **Inbox** and select a call or hover over the item avatar and click **Remove Hold**.

Tagging calls with Account Codes

Account Codes identify services, departments, or other elements of the contact center. They are numerical codes with predefined meanings that are used for reporting purposes. You can apply multiple Account Codes during an interaction. The duration of each Account Code is measured from when the Account Code is entered until either the end of the call or the time a new Account Code is entered. Agents tag calls with Account Codes in Ignite to indicate in reports what the interaction segment was about.

For example, an agent handling calls for three catalog companies enters an Account Code of ‘01’ to indicate the customer is inquiring about Company A. Later in the interaction, the agent enters an Account Code of ‘06’ to indicate that the customer is now inquiring about Company A’s mail-out services.

Agents can tag calls with multiple Account Codes. Account Codes must be entered during the call and cannot be entered after the call has ended.

NOTE:

- Ignite (WEB) enables agents to filter Account Codes rather than sorting them by categories.

To tag a call with an Account Code (WEB)

1) Select a call or hover over the item avatar and click **Classify**.
2) Select an Account Code. You can type the name or number of a Code in the **Search** field.

   NOTE: If you enter a number in the search field, you can apply the Code by pressing ‘Enter’ when prompted.

Tagging calls with Classification Codes

Classification Codes are a type of Account Code but differ in the following ways:

- You can apply multiple Classification Codes, and this can be done at any point during the (call or interaction) or its Work Timer. All Classification Codes applied to a call are pegged with the full call duration, from the time the call arrives until the call ends. This includes transfer time. It also includes Work Timer duration if 'Include queue work timer as part of handling time' is enabled on the queue. If the same code is entered twice, it is not double pegged in reporting statistics.
- Classification Codes can be ‘forced’, meaning the agent must enter a Classification Code either during the call or when in Work Timer to remain within compliance.
- Account Codes can only be entered during a call, but Classification Codes can be entered during or after a call (while in Work Timer). There are often scenarios within which you set single or multiple Account Codes during a call and then set a Classification Code when the call terminates.

NOTE: Classification Codes are only supported for ACD voice (calls or interactions).

NOTE: During a call, apply Classification Codes as you would Account Codes, using the list of Account Codes in the ‘Set Account Code’ rolling panel in the Sidebar or in the 'History and Account Code' section of the Preview pane.

To tag a call with a Classification Code after a call ends (DESKTOP)

1) In the **Sidebar**, click the **Classify** button to open the **Classify** rolling panel.

   When the call ends, the Classify button displays (and flashes if forced Classification Codes are enabled) and Work Timer is activated.

2) Select the applicable Classification Code from the list that displays and click **Apply**.

   NOTE: If you are handling more than one item in the Inbox, for example, one email and one call, and you apply a Classification Code during the call, it will be applied to the call regardless of which item is currently selected in the Inbox. If you apply a Classification Code after the call when in Work Timer, the voice interaction stays in your Inbox and you must use the ‘Classify’ button in the Sidebar to apply a Classification Code to the voice interaction.

3) If Work Timer has not been configured to automatically cancel after entering a Classification Code, cancel Work Timer by clicking the **Remove Work Timer** button in the **Sidebar**.

   NOTE: Forced Classification Codes prevent canceling Work Timer until a Code is entered. Failing to enter a Classification Code before Work Timer expires or is removed by entering Busy/Make Busy or DND can result in a default Classification Code of ‘-1 Non-Compliant’ applied automatically.

To tag a call with a Classification Code after a call ends (WEB)

NOTE: During a call, apply Classification Codes as you would Account Codes, but select 'Classification' in the Classify dialog window.

1) Click **Enter a Classification Code**.
2) Select a Classification Code. You can type the name or number of a Code in the **Search** field.

   NOTE: If you enter a number in the search field, you can apply the Code by pressing 'Enter' when prompted.

Transferring calls (DESKTOP)

You can transfer calls to internal and external destinations. Internal transfer destinations include destinations programmed in the voice media server or in a cluster of voice media servers. External transfer destinations include dialable numbers not programmed in the voice media server or in the cluster of voice media servers. For example, agents in the Support queue receiving calls concerning account renewals can transfer these calls internally to the Sales queue, or agents can transfer calls externally to a supervisor's cell phone.

To receive transfers devices must be enabled to handle the interaction's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred calls, but the call can be transferred to their voicemail. Agents who are either in Busy/Make Busy or at their call Workload limit can receive transferred calls.

Call transfers in Ignite are always blind transfers. In blind transfers, there is no communication with transfer destinations before sending calls. Calls are transferred immediately, and the system does not monitor the outcome.

To perform a supervised transfer, you must use MiCollab Client, Contact Center Softphone, Contact Center PhoneSet Manager or Ignite Web. See the *MiContact Center Business User Guide* for more information.

NOTE:

- You cannot transfer calls on hold. Hold must be removed before the call can be transferred.
- You may only transfer interactions if you have the appropriate permissions.

The following procedures explain how to

- Blind transfer calls to a voice-enabled employee or queue
- Blind transfer calls to a dialable number

  NOTE: This option is only available with Click to Call. For more information, see "Contacting agents before transferring calls".
- Perform a supervised transfer using Merge (DESKTOP)
- Perform a supervised transfer using Click to Call and Merge (DESKTOP)

  NOTE: This option is only available with Click to Call. For more information, see "Contacting agents before transferring calls".

To blind transfer a call to a voice-enabled employee or queue (DESKTOP)

1) When on a call, in the **Action** bar, click **Transfer**.
2) Select the **Internal Transfer** radio button and select a voice-enabled employee or queue. Expand the device list if necessary. You can search for an internal transfer destination by typing the name of a voice-enabled employee or queue in the ‘Search’ field.
3) Click **Transfer**.

To blind transfer a call to a dialable number (DESKTOP)

1) When on a call, in the **Action** bar, click **Transfer**.
2) Select the **External Transfer** radio button and, in the **Transfer To:** field, type a dialable number. Enter this number as you would on a phone, including any digits required for outbound dialing.

   NOTE: Invalid entries return an error message. Re-type a valid entry and click ‘Transfer’.
3) Click **Transfer**.

Transferring calls (WEB)

You can perform either a blind or a supervised transfer of a voice call from Web Ignite. To perform either type of transfer, you make a consultation call to another party (the available queues, employees, external, or Active Directory contacts) and then decide whether you want to transfer the call immediately (blind transfer) or wait to talk to the other party before you transfer the call (supervised transfer). You can also modify the call to make it a conference while talking to the consultative party.

Transition to alternate conversation types

During an interaction, agents can transition to an alternate interaction type if the agent is associated with that media type and if the customer’s relevant contact details are available. Agents can also edit contact information during an interaction.

See the *"Transitioning from one conversation type to another (WEB)"* section in this guide.

Requesting help

You can request help from other voice-enabled employees by clicking the Request Help Call Control button in the Sidebar. When you click the button, you can enter either a valid DN in the free form text box or select an employee from a pre-populated list. The system dials the DN, and the employee is added to the call when they accept.

Employees who accept requests for help join the call in Silent Monitor mode and are not audible unless they escalate to Coach or Barge.

Help requests to queues or to external numbers are not supported

The Request Help button is available as soon as a call is delivered to your Inbox. You can send multiple requests for help during a call, but you can only send one request at a time. Requests sent to employees in unavailable states fail.

The Request Help button is not available when a call is on hold.

To request help on a call (Desktop)

1) In the **Sidebar**, click the **Request Help** button

   Ignite displays a list of voice-enabled employees and enables you to look up contacts in the Active Directory (AD)

2) In the **Request Help** window, do one of the following:
   - Select a voice-enabled employee from the list
   - In the Search box, enter a voice-enabled employee or AD contact's dialable number
   - In the Search box, enter the name of a voice-enabled employee or AD contact

3) Click **Call**.

   NOTE: You cannot cancel requests in progress. The Request Help button is disabled (turns gray) while the call is being established. Hover over the button with your mouse to view the connection status in a tool tip.
   - If the request is answered within 180 seconds, notification that the request help is established is displayed, and the **Request Help** icon is displayed next to the caller's icon and on the Inbox item. The **Request Help Call Control** button is no longer available until the employee that answered the Request Help call hangs up.
   - If the request is declined or times out, a notification that the request help was declined is displayed. The **Request Help Call Control** button is available, and the employee can make a new Request Help call.

To request help on a call (WEB)

1) Click the **Request Help** icon in the handling icons.

   Ignite displays a list of voice-enabled employees and their ACD status.

2) In the **Request Help** window, do one of the following:
   - Select a voice-enabled employee from the list
   - In the text box, enter a voice-enabled employee's dialable number
   - In the **Search** box, type the name or dialable number of a voice-enabled employee

3) Click **Call**.

   NOTE: You cannot cancel requests in progress.
   - If the request is answered within 180 seconds, a notification that the request help is established is displayed, the **Request Help** icon is displayed next to the caller's icon and on the **Inbox** item. The **Request Help** icon is no longer available till the employee that answered the Request Help call hangs up
   - If the request for help is not answered within 180 seconds, the request times out and you can make another request for help.

NOTE: The length of time a request help call rings for is defined in the Ignite configuration. By default, duration is set to 180. See the KB article SO3146 in Mitel Knowledge Management System for information on how to change this, and how it interacts with the Agent COS.

Contacting agents before transferring calls

You can choose to instant message or call other employees(DESKTOP and WEB) to alert them of an incoming transfer.

DESKTOP - The Click to Call option is not displayed when agents are in Do Not Disturb or absent from their agent groups.

NOTE:

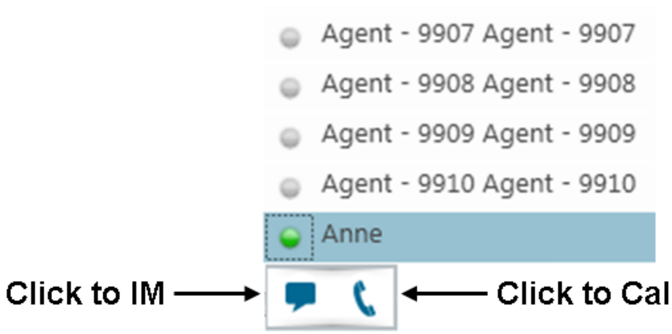
- If an agent has multiple voice agents, Ignite provides call control for the number associated with the currently active voice agent
- DESKTOP - Click to IM does not support group IM sessions.

To Click to Call or Click to IM (DESKTOP)

1) In the **Transfer** window, select an available agent.
2) Select **Click to IM** to initiate an IM session or select **Click** to Call to initiate a voice call. See the following figure

NOTE: The recipient's presence displays, advising of their availability to receive your call or instant message.

Figure 11: Click to IM and Click to Call



To Click to Call (WEB)

1) Click **Contacts**.
2) If the destination is not a recent contact, type its name or number in the **Search** field.
3) Hover over the destination's avatar and click **Call**.

Handling calls using the Active Call window (WEB)

When on a call, agents can use the Active Call window for basic call handling options.

For procedures on specific call handling actions supported in the Active Call window, see the appropriate sections of this guide.

For procedures on using Contacts to reach another person, see the appropriate sections of this guide.

To handle a call using the Active Call window

1) When on a call, click the **Phone** button.
2) Choose a call handling option.
3) To close the Active Call window, click the **Phone** button.

Putting calls on hold and retrieving calls from hold

At times, agents may have to put a call on hold. Ignite displays a paused icon over calls on hold so they can be easily identified.

NOTE: Calls on hold may not be transferred until hold is removed.

The following explains how to

- Put a call on hold
- Retrieve a call from hold

To put a call on hold (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select the active call.
3) In the **Action** bar, click the **Hold** button.

To put a call on hold in the Conversation window (DESKTOP)

- In the **Conversation** window, click **Hold**.

To put a call on hold (WEB)

- Click **Inbox** and select a call, or hover over the item avatar, and click **Hold**.

To put a call on hold (MiCollab Client)

- Click **Inbox** and select a call, or hover over the item avatar, and click **Hold**.

To retrieve a call from hold (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select the call on hold.
3) In the **Action** bar, click **Remove Hold**.

To retrieve a call from hold in the Conversation window (DESKTOP)

- In the **Conversation** window, click the **Remove Hold** button.

To retrieve a call from hold (WEB)

- Click **Inbox** and select a call or hover over the item avatar and click **Remove Hold**.

Tagging calls with Account Codes

Account Codes identify services, departments, or other elements of the contact center. They are numerical codes with predefined meanings that are used for reporting purposes. You can apply multiple Account Codes during an interaction. The duration of each Account Code is measured from when the Account Code is entered until either the end of the call or the time a new Account Code is entered. Agents tag calls with Account Codes in Ignite to indicate in reports what the interaction segment was about.

For example, an agent handling calls for three catalog companies enters an Account Code of ‘01’ to indicate the customer is inquiring about Company A. Later in the interaction, the agent enters an Account Code of ‘06’ to indicate that the customer is now inquiring about Company A’s mail-out services.

Agents can tag calls with multiple Account Codes. Account Codes must be entered during the callb and cannot be entered after the call has ended.

NOTE:

- Ignite (WEB) enables agents to filter Account Codes rather than sorting them by categories.

To tag a call with an Account Code (WEB)

1) Select a call or hover over the item avatar and click **Classify**.
2) Select an Account Code. You can type the name or number of a Code in the **Search** field.

   NOTE: If you enter a number in the search field, you can apply the Code by pressing 'Enter' when prompted.

Tagging calls with Classification Codes

Classification Codes are a type of Account Code but differ in the following ways:

- You can apply multiple Classification Codes, and this can be done at any point during the (call or interaction) or its Work Timer. All Classification Codes applied to a call are pegged with the full call duration, from the time the call arrives until the call ends. This includes transfer time. It also includes Work Timer duration if 'Include queue work timer as part of handling time' is enabled on the queue. If the same code is entered twice, it is not double pegged in reporting statistics.
- Classification Codes can be 'forced', meaning the agent must enter a Classification Code either during the call or when in Work Timer to remain within compliance.
- Account Codes can only be entered during a call, but Classification Codes can be entered during or after a call (while in Work Timer). There are often scenarios within which you set single or multiple Account Codes during a call and then set a Classification Code when the call terminates.

NOTE: Classification Codes are only supported for ACD voice (calls or interactions).

NOTE: During a call, apply Classification Codes as you would Account Codes, using the list of Account Codes in the 'Set Account Code' rolling panel in the Sidebar or in the 'History and Account Code' section of the Preview pane.

To tag a call with a Classification Code after a call ends (DESKTOP)

1) In the **Sidebar**, click the **Classify** button to open the **Classify** rolling panel.

   When the call ends, the Classify button displays (and flashes if forced Classification Codes are enabled) and Work Timer is activated.
2) Select the applicable Classification Code from the list that displays and click **Apply**.

   NOTE: If you are handling more than one item in the Inbox, for example, one email and one call, and you apply a Classification Code during the call, it will be applied to the call regardless of which item is currently selected in the Inbox. If you apply a Classification Code after the call when in Work Timer, the voice interaction stays in your Inbox and you must use the 'Classify' button in the Sidebar to apply a Classification Code to the voice interaction.
3) If Work Timer has not been configured to automatically cancel after entering a Classification Code, cancel Work Timer by clicking the **Remove Work Timer** button in the **Sidebar**.

   NOTE: Forced Classification Codes prevent canceling Work Timer until a Code is entered. Failing to enter a Classification Code before Work Timer expires or is removed by entering Busy/Make Busy or DND can result in a default Classification Code of '-1 Non-Compliant' applied automatically.

To tag a call with a Classification Code after a call ends (WEB)

NOTE: During a call, apply Classification Codes as you would Account Codes, but select 'Classification' in the Classify dialog window.

1) Click **Enter a Classification Code**.
2) Select a Classification Code. You can type the name or number of a Code in the **Search** field.

   NOTE: If you enter a number in the search field, you can apply the Code by pressing 'Enter' when prompted.

Transferring calls (DESKTOP)

You can transfer calls to internal and external destinations. Internal transfer destinations include destinations programmed in the voice media server or in a cluster of voice media servers. External transfer destinations include dialable numbers not programmed in the voice media server or in the cluster of voice media servers. For example, agents in the Support queue receiving calls concerning account renewals can transfer these calls internally to the Sales queue, or agents can transfer calls externally to a supervisor's cell phone.

To receive transfers devices must be enabled to handle the interaction's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred calls, but the call can be transferred to their voicemail. Agents who are either in Busy/Make Busy or at their call Workload limit can receive transferred calls.

Call transfers in Ignite are always blind transfers. In blind transfers, there is no communication with transfer destinations before sending calls. Calls are transferred immediately, and the system does not monitor the outcome.

To perform a supervised transfer, you must use MiCollab Client, Contact Center Softphone, Contact Center PhoneSet Manager or Ignite Web. See the *MiContact Center Business User Guide* for more information.

NOTE:

- You cannot transfer calls on hold. Hold must be removed before the call can be transferred.
- You may only transfer interactions if you have the appropriate permissions.

The following procedures explain how to

- Blind transfer calls to a voice-enabled employee or queue
- Blind transfer calls to a dialable number

  NOTE: This option is only available with Click to Call. For more information, see *"Contacting agents before transferring calls"*.
- Perform a supervised transfer using Merge (DESKTOP)
- Perform a supervised transfer using Click to Call and Merge (DESKTOP)

  NOTE: This option is only available with Click to Call. For more information, see *"Contacting agents before transferring calls"*.

To blind transfer a call to a voice-enabled employee or queue (DESKTOP)

1) When on a call, in the **Action** bar, click **Transfer**.
2) Select the **Internal Transfer** radio button and select a voice-enabled employee or queue. Expand the device list if necessary. You can search for an internal transfer destination by typing the name of a voice-enabled employee or queue in the 'Search' field.
3) Click **Transfer**.

To blind transfer a call to a dialable number (DESKTOP)

1) When on a call, in the **Action** bar, click **Transfer**.
2) Select the **External Transfer** radio button and, in the **Transfer To:** field, type a dialable number. Enter this number as you would on a phone, including any digits required for outbound dialing.

   NOTE: Invalid entries return an error message. Re-type a valid entry and click 'Transfer'.
3) Click **Transfer**.

To perform a blind transfer

1) Click **Inbox** and select a call or hover over the item avatar and click **Accept**.
2) Select the call or hover over the item avatar and click **Transfer**.

   Transfer window lists all the numbers from available queues, employees, external, or Active Directory contacts.
3) To select a contact to transfer the call, hover over the contact. This enables the Blind Transfer and Consultation Call buttons.
4) Hover over the Blind Transfer button to list the dialable numbers associated with the contact.
   – If the contact has only one associated dialable number, you can select the dialable number or click on the transfer button to transfer the call.
   – If the contact has more than one dialable number, select a dialable number to transfer the call.

The call is now ringing the other party and you are disconnected. The conversation will stay in your inbox if a Work Timer applies to it.

To perform a supervised transfers

1) Click **Inbox** and select a call or hover over the item avatar and click **Accept**.
2) Select the call or hover over the item avatar and click **Transfer**.

   Transfer window lists all the numbers from available queues, employees, external, or Active Directory contacts.
3) To select a contact to transfer the call, hover over the contact. This enables the Blind Transfer and Consultation Call buttons.
4) Hover over the Consultation Call button to list the dialable numbers associated with the contact.
   – If the contact has only one associated dialable number, you can select the dialable number or click on the Consultation Call button to transfer the call.
   – If the contact has more than one dialable number, select a dialable number to transfer the call.

   The call now is ringing the other party and the caller is placed on hover.

5) Before the other party accepts the transfer, you can do the following:
   - Click **Cancel Transfer** to cancel the call with the other party whom you consulted and connect back to the caller.
   - Click **Complete Transfer** to complete the transfer.

6) After the other party accepts the transfer, you can do one of the following:
   - Click **Cancel Transfer** to cancel the call with the other party whom you consulted and connect back to the caller.
   - Click **Complete Transfer** to complete the transfer.
   - Click **Conference** to connect the three parties together.
   - Click **Swap** to swap the hold. (Applicable to MiVB only).
   - Click **Hold** to put both parties on hold. (Applicable to SIP Only).
   - Click **RemoveHold** to remove hold. (Applicable to SIP Only).

   After you leave the call, the conversation will stay in your inbox if a Work Timer applies to it.

Initialize Conferencing calls

While you are on a call with a customer, you can invite other parties into the call to create a conference. You cannot transfer a call that is in a conference. You can hang up to leave the conference or put the call on hold, muting the person who puts it on hold, and keeps them from hearing the conference. Other parties in the conference can also invite others to the conference.

You can initiate a conference through a supervised transfer. See the “Transfer calls” section for details.

To conference a call (DESKTOP)

1) When on a call, in the **Conversation** window, click the Invite More People button
2) Type the name or number of the participant you want to invite.
3) Select a participant and click the **Invite** button.

   The system calls the specified participant. When the participant answers, they are added to the call.
4) To invite additional participants, repeat the above steps.

To create a conference call (WEB)

1) While on a call, click the **Invite** button. The **Invite** window opens.
2) In the **Invite** window, you can search and filter to find the required contacts from the available queues, employees, or external or Active Directory contacts.
3) Click the avatar. You can include up to five parties in a conference call.

   *The first agent who answered the call will be in ACD state during the conference and if the call was transferred to another agent, the second agent will be in Non ACD state. You can view all the participants of the conference under the **Participants** list in Ignite.*

Conferencing calls

While you are on a call with a customer, you can invite other parties into the call to create a conference. You cannot transfer a call that is in a conference. You can hang up to leave the conference or put the call on hold, muting the person who puts it on hold, and keeps them from hearing the conference. Other parties in the conference can also invite others to the conference.

You can invite other participants into an existing call to create a multi-party conference call. You can leave a conference call after initiating it without ending the call for the other participants.

To create a conference call (WEB)

1) While on a call, click the **Invite** button. The **Invite** window opens.
2) In the **Invite** window, you can search and filter to find the required contacts from the available queues, employees, or external or Active Directory contacts.
3) Click the **avatar**. You can include up to five parties in a conference call.

   *The first agent who answered the call will be in ACD state during the conference and if the call was transferred to another agent, the second agent will be in Non ACD state. You can view all the participants of the conference under the **Participants** list in Ignite.*

Transition to alternate conversation types

During an interaction, agents can transition to an alternate interaction type if the agent is associated with that media type and if the customer's relevant contact details are available. Agents can also edit contact information during an interaction.

See the *"Transitioning from one conversation type to another (WEB)"* section in this guide.

Requesting help

You can request help from other voice-enabled employees by clicking the Request Help Call Control button in the Sidebar. When you click the button, you can enter either a valid DN in the free form text box or select an employee from a pre-populated list. The system dials the DN, and the employee is added to the call when they accept.

Employees who accept requests for help join the call in Silent Monitor mode and are not audible unless they escalate to Coach or Barge.

Help requests to queues or to external numbers are not supported

The Request Help button is available as soon as a call is delivered to your Inbox. You can send multiple requests for help during a call, but you can only send one request at a time. Requests sent to employees in unavailable states fail.

The Request Help button is not available when a call is on hold.

To request help on a call (Desktop)

1) In the **Sidebar**, click the **Request Help** button

   Ignite displays a list of voice-enabled employees and enables you to look up contacts in the Active Directory (AD)
2) In the **Request Help** window, do one of the following:
   – Select a voice-enabled employee from the list
   – In the Search box, enter a voice-enabled employee or AD contact's dialable number
   – In the Search box, enter the name of a voice-enabled employee or AD contact
3) Click **Call**.

NOTE: You cannot cancel requests in progress. The Request Help button is disabled (turns gray) while the call is being established. Hover over the button with your mouse to view the connection status in a tool tip.

– If the request is answered within 180 seconds, notification that the request help is established is displayed, and the **Request Help** icon is displayed next to the caller's icon and on the Inbox item. The **Request Help Call Control** button is no longer available until the employee that answered the Request Help call hangs up.
– If the request is declined or times out, a notification that the request help was declined is displayed. The **Request Help Call Control** button is available, and the employee can make a new Request Help call.

To request help on a call (WEB)

1) Click the **Request Help** icon in the handling icons.

   Ignite displays a list of voice-enabled employees and their ACD status.

2) In the **Request Help** window, do one of the following:
   – Select a voice-enabled employee from the list
   – In the text box, enter a voice-enabled employee's dialable number
   – In the **Search** box, type the name or dialable number of a voice-enabled employee

3) Click **Call**.

   NOTE: You cannot cancel requests in progress.
   – If the request is answered within 180 seconds, a notification that the request help is established is displayed, the **Request Help** icon is displayed next to the caller's icon and on the **Inbox** item. The **Request Help** icon is no longer available till the employee that answered the Request Help call hangs up
   – If the request for help is not answered within 180 seconds, the request times out and you can make another request for help.

NOTE: The length of time a request help call rings for is defined in the Ignite configuration. By default, duration is set to 180. See the KB article SO3146 in Mitel Knowledge Management System for information on how to change this, and how it interacts with the Agent COS.

Contacting agents before transferring calls

You can choose to instant message or call other employees(DESKTOP and WEB) to alert them of an incoming transfer.

DESKTOP - The Click to Call option is not displayed when agents are in Do Not Disturb or absent from their agent groups.

NOTE:

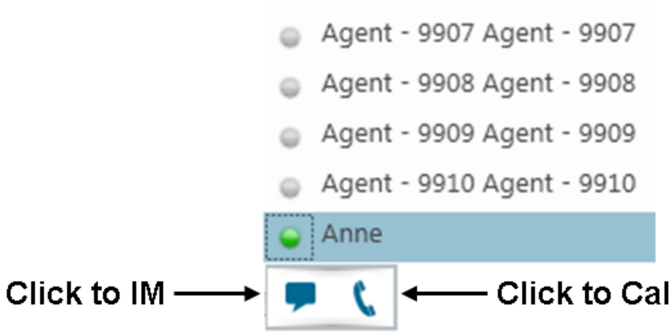
- If an agent has multiple voice agents, Ignite provides call control for the number associated with the currently active voice agent
- DESKTOP - Click to IM does not support group IM sessions.

To Click to Call or Click to IM (DESKTOP)

1) In the **Transfer** window, select an available agent.
2) Select **Click to IM** to initiate an IM session or select **Click** to Call to initiate a voice call. See the following figure

NOTE: The recipient's presence displays, advising of their availability to receive your call or instant message.

Figure 12: Click to IM and Click to Call



To Click to Call (WEB)

1) Click **Contacts**.
2) If the destination is not a recent contact, type its name or number in the **Search** field.
3) Hover over the destination's avatar and click **Call**.

Handling calls using the Active Call window (WEB)

When on a call, agents can use the Active Call window for basic call handling options.

For procedures on specific call handling actions supported in the Active Call window, see the appropriate sections of this guide.

For procedures on using Contacts to reach another person, see the appropriate sections of this guide.

To handle a call using the Active Call window

1) When on a call, click the **Phone** button.
2) Choose a call handling option.
3) To close the Active Call window, click the **Phone** button.

Handling emails in Ignite

Handling emails in Ignite mirrors common email client behavior, offering agents and supervisors a familiar and user-friendly environment. Ignite supports both HTML and plain text emails.

NOTE: Removing or otherwise altering case and ticket numbers in subject lines before handling emails can interfere with preferred agent routing. Agents should contact their supervisors or system administrators before editing case and ticket numbers in email subject lines.

The following explains how to

- Preview emails

- Preview drafted content for emails in queue (DESKTOP)
- Pick emails out of queue
- Reply to emails
- Forward emails
- Add attachments to emails
- Insert images in emails
- Preview and save attachments
- Transfer emails to internal and external destinations
- Decline emails
- Mark emails as ‘No Reply’ and ‘Junk’
- Place emails on hold and retrieve emails from hold
- Transition to alternate interaction types
- Correct spelling in email responses
- Create personal reply templates
- Apply personal reply templates to emails
- Apply reply templates to emails
- Apply personalized signatures to emails
- Apply quick reply templates to emails
- Reroute Failed emails
- Handle oversized emails
- Handle bounced emails
- Send outbound emails

NOTE: DESKTOP - To complete the following procedures, you must be in Ignite’s My Folder’s View.

Previewing emails

If administrative configurations permit, agents can preview interactions before picking them out of queue or handling them.

The following explains how to

- Preview emails in queue
- Preview emails in the Inbox

To preview an email in queue (DESKTOP)

1) In the **Folders** pane, select a queue.
2) In the **List** pane, select an email.

To preview an email in queue (WEB)

1) Click **Queues** and select a queue.
2) Select an email to preview.

To preview an email in the Inbox (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select an email.

To preview an email in the Inbox (WEB)

- Click **Inbox** and select an email to preview. In addition to handling options, you can quickly access the case details, notes, calls, all the participants of the case, and other cases from the same customer. This can save time when you are interacting with a customer.

To preview emails in Cases (WEB)

- Click **Cases** and select the email to preview.

Previewing drafted content for emails in queue (DESKTOP)

If administrative configurations permit previewing emails in the Preview Pane before picking emails out of queue, agents can also choose to preview content drafted by other agents in requeued emails.

Normally agents only see the original content of the email interaction when viewing emails in the List pane or the Preview pane. Requeued emails, however, may contain content drafted by employees for use by other agents in the contact center. Agents can choose to filter the List pane's contents for a queue to only show the emails in queue that have drafted content from other agents and include the drafted contents in the List pane and in the Preview pane. If agents navigate away from the queue to another queue, the filter is removed.

NOTE: Previewing drafted content for emails in queue in Ignite requires agent previews to be enabled on the media server. See *"Configuring Advanced options for media servers"* for more information.

The following procedures explain how to

- Preview drafted content for emails in queue
- Revert to viewing all emails in queue

To preview drafted content for emails in queue

1) In the **Folders** pane, right-click the email queue for which you want to preview drafted content.
2) Select **Drafts**.

   The List pane displays the requeued emails in queue that have drafted content. The Folder pane displays the queue name in orange and italics.

To revert to viewing all emails in queue

1) In the **Folders** pane, right-click the email queue.
2) Select the queue name.

   The List pane displays all emails in queue. Drafted content is not displayed.

Picking emails out of queue

Pick behavior occurs in the following ways: First, agents can pick interactions out of queue and send them to the Inbox. When the interactions ring in the Inbox, agents can handle them. Second, agents can choose to pick and reply to an interaction. Choosing to pick and reply to an interaction sends the interaction to the agent's Inbox from where the agents can handle the interaction. Cc'd recipients are included in the reply.

Emails picked out of queue ring in the agent’s Inbox until the interaction is put into reply mode. For more information on ringing behavior, see *"Ringing states in Ignite"*.

NOTE:

- Agents cannot pick or pick and reply to interactions from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to interactions from the queue if they have the appropriate permissions.

The following procedures explain how to

- Pick an email out of queue and handle the email
- Pick and automatically reply to an email

To pick an email out of queue and handle the email (DESKTOP)

1) From the **Folders** pane, select the queue from which the email will be picked.
2) From the **List** pane, select an email from the queue and, from the **Action** bar, click the **Pick** button.

   The email is transferred to your Inbox.
3) To handle the email, select **Inbox** and, in the **List** pane, select the email.

   NOTE: Additional handling options display in the Action bar. For information on handling the email, see the appropriate procedures in this section.

To pick an email out of queue and handle the email (WEB)

1) Click **Queues** and select the appropriate queue.
2) Select an interaction or hover over the item avatar and click **Pick > Pick**.

   The email is transferred to your Inbox.
3) To handle the email, click **Inbox** and select the email or hover over the item avatar.
4) Select either **Reply** or **Reply all**.

To pick and automatically reply to an email (DESKTOP)

NOTE: This action functions as 'reply all' if there are recipients Cc’d on the original email.

1) In the **Folders** pane, select the queue from which an email will be picked.
2) In the **List** pane, select an email from the queue and, from the **Action** bar, click the **Pick & Reply** button.

   The email is transferred to your Inbox and opens in reply mode, with all recipients copied.

   NOTE:

   – Additional handling options display in the Action bar. For information on handling the email, see the appropriate procedures in this section.

   – If the email to which you are replying has an existing draft, the To:, CC:, and BCC: fields are cleared and refilled with the default addresses based on the reply type selected.

To pick and automatically reply to an email (WEB)

1) Click **Queues** and select the appropriate queue.
2) Select an interaction or hover over the item avatar and click **Pick > Pick and Reply**.

The interaction is transferred to your Inbox and opens in reply mode with all recipients copied.

Replying to emails

Once an email is in the Inbox, agents can write and send a response. Agents can reply to the email's sender only, reply to all email recipients, insert additional addresses in their email's To: field, and, if enabled for the email queue, select a From address from one of the email queues they handle. Agents can also copy and blind-copy other email addresses on replies.

NOTE: When replying to an email, you can select the **Paste as Text** button to paste the content into the email message as plain text. When you click **Paste as Text** for the first time, Ignite displays the message, "Paste is now in plain text mode. Contents will now be pasted as plain text until you toggle this option off. The latest state of the toggle button is saved to your profile.

DESKTOP - Emails to which an agent has replied display under 'Handled', in the Folders pane.

Formatted URLs entered by agents in email responses will become links when the agent sends the email reply.

Note that, by default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.

To reply to an email (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select an email and, in the **Action** bar, click **Reply or Reply All.**

   NOTE: If the email to which you are replying has an existing draft, the To:, CC:, and BCC: fields are cleared and refilled with the default addresses based on the reply type selected.
3) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4) If enabled for this queue, you can select a different From address by clicking **From** and selecting the email address.

   By default, From is set to the email address of the last queue the email was handled from.
5) Type the email's contents and, in the **Action** bar, click **Send** . An icon displays over the Preview pane, indicating the email is being sent.

   NOTE: Additional handling options display in the Action bar. For more information, see the appropriate procedures in this section.

To reply to an email (WEB)

1) Click **Inbox** and select an email or hover over the item avatar.
2) Click **Reply** and select either **Reply or Reply All**.

   NOTE: If the email to which you are replying has an existing draft, the To:, CC:, and BCC: fields are cleared and refilled with the default addresses based on the reply type selected.
3) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.

NOTE: If you want to initiate an email to multiple customers without manually entering the addresses, select the interaction in Inbox, in the preview pane, click **Participants** tab, click the avatars of the desired contacts, a check mark is displayed against the selected contacts, now click the email icon next to the

Contacts Selected text. A new draft with all the selected customer email addresses in the **To** field is initiated.

4) If enabled for this queue, you can select a different From address by clicking **From** and selecting the email address.

   By default, From is set to the email address of the last queue the email was handled from.

5) Type the email's contents and click **Send**.

Forwarding emails

You can forward emails to multiple parties with additional recipients copied and blind-copied on forwarded mails.

DESKTOP - You can forward emails from the My History folder and its subfolders, the History folder and its subfolders, and the Failed folders. Forwards in progress are housed in the agent's personal Drafts folder, in the Forward subfolder. When forwarding an email that failed to route, the options to reroute or junk the email will not be available.

WEB - You can forward emails from the History page. Forwards in progress are housed as drafts in the Inbox.

Agents cannot forward emails from reply mode. Instead, agents can transfer emails to internal and external destinations. For more information, see *"Transferring emails to internal and external destinations"* and *"Replying to emails"*.

NOTE: When replying to an email, you can select the **Paste as Text** button to paste the content into the email message as plain text. When you click **Paste as Text** for the first time, Ignite displays the message, “Paste is now in plain text mode. Contents will now be pasted as plain text until you toggle this option off. The latest state of the toggle button is saved to your profile.

The following procedures explain how to

- Forward an email
- Discard forwards in progress

To forward an email (DESKTOP)

1) In the **My Folders** view, expand the **Folders** pane.
2) In the **Folders** pane, select either the **History**, **My History**, the **Failed** folder, or their subfolders.
3) In the List pane, select the email and, in the **Action** bar, click **Forward**.
4) Insert addresses in the **To**: field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
5) Click **Send**.

To forward an email (WEB)

1) Click **History** and, optionally, select a **Filter:**.
2) Select an email or hover over the item avatar and click **Forward**.
3) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4) Click **Send**.

NOTE: When you forward an email to an external email address, the contact information is automatically added to the associated case and in the database. Also, the state of the case is updated to "Waiting for customer".

To discard a forward in progress (DESKTOP)

1) In the **My Folders** view, expand the **Folders** pane .
2) In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3) Expand the **Drafts** folder and select **Forward**.
4) In the **List** pane, select the email and, in the Action bar, click **Discard Draft**.

To discard a forward in progress (WEB)

- Click **Inbox** and either select the forward in progress or hover over the item avatar and click **Discard**.

Adding attachments to emails

When replying to or forwarding an email, agents can add attachments. Agents can either drag and drop attachments into emails or add attachments by following the steps below. When dragging and dropping attachments, you must drop the attachment into the area of the User Interface that displays the **To:**, **CC:**, and **Bcc:** fields. Note that files attached by drag-and-drop are not embedded in the body of the email. To embed an image in the body of an email, see *"Inserting images in emails"*.

Note that, by default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.

To add an attachment to an email (DESKTOP and WEB)

1) When replying to an email, click the **Add attachment** icon. This icon displays as a paperclip.
2) Navigate to the file and click **Open**. You can select multiple files.
3) To remove an attachment, click the **X** button beside the attachment.

Inserting images in emails

You can insert images in emails using Ignite's Insert Image button, or can drag-and-drop or copy/paste images into email responses.

Inserting an image into an email embeds the image in the body of the email at the cursor point. Dragging and dropping an image adds the image as an attachment. Copying and pasting an image into an email embeds the image in the body of the email.

50 inserted images will be visible in Ignite email responses. After 50 the images will show as an X in Ignite, but will display to the recipient in full.

Note that, by default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.

To insert images in emails (DESKTOP and WEB)

1) When replying to an email, click the **Insert picture** icon.
2) Navigate to the image and click **Open**. You can select multiple files.
3) To remove an image from an email, select the image and press the **Delete** key.

Previewing, saving, and removing attachments

NOTE: Previewing and saving attachments are currently available in Ignite desktop only. The Ignite web client allows for downloading attachments only.

Agents can preview the following attachments on incoming emails: PDF, Word, Excel, and Windows Media files (.wma). Note that these applications are not included with Ignite and must be installed on the agent's desktop for previewing to function. Agents can also save attachments to their hard drives, and remove attachments from received emails.

The following procedures explain how to

- Preview PDF, Word, Excel, and Windows Media files attachments
- Save attachments
- Remove attachments

To preview an attachment (DESKTOP)

1) In the **Preview** pane, click the attachment and select **Open**.

   NOTE: If the list of attachments exceeds two lines, use the scroll bar to navigate attachments.

To save an attachment (DESKTOP)

1) In the **Preview** pane, click the attachment and select **Save**. If the list of attachments exceeds two lines, use the scroll bar to navigate attachments.
2) Browse to a save location and click **Save**.

   NOTE: Save dialog options may vary depending on your operating system. If more information is required, please consult Microsoft Windows documentation.

To remove attachments (DESKTOP and WEB)

1) To remove an attachment, click the **X** button beside the attachment.
2) To remove all attachments, to the right of the attachments, click the **Remove All Attachments** button.

Transferring emails to internal and external destinations

Agents can transfer emails to both internal and external destinations. For example, agents in the Support queue receiving requests for account renewals can transfer these contacts to the Sales queue. Transfers include any email attachments.

Agents transfer emails internally to other agents and to queues. To receive transfers, devices must be enabled to handle the interaction's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred emails. Agents who are either in Busy/Make Busy or at their email Workload limit can receive transferred emails.

When agents transfer emails from their Inbox, the email retains any text entered. This enables agents receiving transferred mails to see and build on responses other agents have drafted.

NOTE:

- You may only transfer interactions if you have the appropriate permissions.

- If you are transferring an email with drafted content, the To:, CC:, and BCC: fields will be cleared and replaced by the default addresses when another agent chooses to Reply or Reply All to the email.

The following explains how to

- Transfer emails to an agent or queue
- Transfer emails to an external address

To transfer an email to an agent or queue (DESKTOP)

1) In the **Folders** pane, click **Inbox**.

   NOTE: To transfer directly from the queue, select the email from the queue and, in the Action bar, click ‘Transfer’. Follow steps 4 onward.
2) In the **List** pane, select an email and, in the **Action** bar, click **Reply**.
3) In the **Action** bar, click **Transfer**.
4) Select the **Internal Transfer** radio button and select an agent or queue. Expand the device list if necessary. You can search for an internal transfer destination by typing the name of an agent or queue in the ‘Search’ field.
5) Click **Transfer**.

To transfer an email to an agent or queue (WEB)

1) Click **Inbox** and select an email or hover over the item avatar and click **Accept**.

   *To transfer directly from the queue, click **Queues**.*

   *To transfer from the **Cases** page, under **Interactions** tab, select the inqueue or inbox email and click **Goto** icon. The Queues page is displayed. You can now transfer the email from the **Queues** page. Follow steps 4 onward.*
2) Click **Reply** and select either **Reply or Reply All**.
3) Click **Transfer**.
4) Select the email or hover over the item avatar and click **Transfer** icon.

NOTE: Optionally you can select multiple emails from the **Inbox** or the **Queues** page and click **Transfer**. The Transfer window is displayed. The list of available Employees and Queues are displayed in the **Results** section.

5) To transfer to an agent, in the **Transfer** window click **Employees** and select an employee from the list.
6) To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list.
7) In the **Transfer** window, click **Employees** and type an email address. Separate multiple addresses with semi-colons.
8) To transfer the email, select the name of the appropriate agent or queue.

To transfer an email to an external address (DESKTOP)

1) In the **Folders** pane, click **Inbox**.

   NOTE: To transfer directly from the queue, select the email from the queue and, in the Action bar, click ‘Transfer’. Follow steps 4 onward.
2) In the **List** pane, select an email and, in the **Action** bar, click **Reply**.

3) In the **Action** bar, click **Transfer**.
4) Select the **External Transfer** radio button and, in the **Transfer To:** field, type an email address. Separate multiple addresses with semi-colons.

   NOTE: Invalid entries return an error message. Re-type a valid entry and click 'Transfer'.
5) Click **Transfer**.

To transfer an email to an external address (WEB)

1) Click **Inbox** and select an email or hover over the item avatar and click **Accept**.

   *To transfer directly from the queue, click **Queues**,*

   *To transfer from the **Cases** page, under **Interactions** tab, select the inqueue or inbox email and click **Goto** icon. The Queues page is displayed. You can now transfer the email from the **Queues** page. Follow steps 4 onward.*
2) Click **Reply** and select either **Reply** or **Reply All**
3) Click **Transfer**.
4) Select the email or hover over the item avatar and click **Transfer** icon.

NOTE: Optionally you can select multiple emails from the **Inbox** or the **Queues** page and click **Transfer**. The Transfer window is displayed. The list of available Employees and Queues are displayed in the **Results** section.

5) To transfer to an agent, in the **Transfer** window click **Employees** and select an employee from the list.
6) To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list.
7) In the **Transfer** window, click **Employees** and type an email address. Separate multiple addresses with semi-colons.
8) To transfer the email, select the appropriate email address(es).

Declining emails

Agents can decline offered emails, sending interactions back to the queue as the longest waiting.

NOTE: When an agent declines an interaction, they are automatically put into Busy/Make Busy across all media capabilities. A System Make Busy and a requeue count is registered for the employee . For more information, see *"Setting and removing Busy/Make Busy in Ignite"*.

To decline an email (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select an email and, in the **Action** bar, click **Decline**.

To decline an email (WEB)

- Click **Inbox** and select an email or hover over the item avatar and click **Decline**.

Marking emails as No Reply and Junk

Occasionally emails requiring no reply, like an out of office message, and junk mail, like spam, reach queues and agents' Inboxes. Agents can mark these emails either as requiring no reply or as junk.

Agents can also junk emails directly from 'Failed' rather than attempting to reroute them.

Marking interactions as No Reply and Junk removes the interactions from Ignite. If the item is in queue or the Inbox, responses in progress are deleted.

NOTE:

- Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- Agents may only Junk interactions if they have the appropriate permissions.

To mark an email as No Reply or Junk (DESKTOP)

1) In the **Folders** pane, either click **Inbox**, select the queue in which the email is waiting, or select a **Failed** folder.
2) In the **List** pane, select an email and, in the **Action** bar, click either **No Reply** or **Junk**.

To mark an email as No Reply or Junk from the Inbox (WEB)

- Click **Inbox** and select an email or hover over the item avatar and click either **No Reply** or **Junk**.

To mark an email as No Reply or Junk from the queue (WEB)

1) Click **Queues** and select an email queue.
2) Select an email or hover over the item avatar and click either **No Reply** or **Junk**.

Placing emails on hold and retrieving emails from hold

Agents may have to stop working on one email in order to work on other items. In these cases, agents can put the active email on hold. Interactions on hold are marked with a 'pause' icon.

Note that administrative configurations may limit how long interactions may be on hold before being requeued and a System Make Busy is registered for the employee. For information on this limit, contact your supervisor or system administrator.

The following procedures explain how to

- Place an email on hold
- Retrieve an email from hold

To place an email on hold (DESKTOP)

- When replying to an email, click the **Hold** button.

To place an email on hold (WEB)

- Click **Inbox** and select an email, or hover over the item avatar, and click **Hold**.

To retrieve an email from hold (DESKTOP)

1) In the **Folders** pane, click **Inbox** and, in the **List** pane, select the email on hold.
2) In the **Action** bar, click **Remove Hold**.

To retrieve an email from hold (WEB)

- Click **Inbox** and select an email on hold or hover over the item avatar and click **Remove Hold**.

Transition to alternate conversation types

During an interaction, agents can transition to an alternate interaction type if the agent is associated with that media type and if the customer's relevant contact details are available. Agents can also edit contact information during an interaction.

See the *"Transitioning from one conversation type to another (WEB)"* section in this guide.

Correcting spelling in email responses

Ignite provides automatic spell checking of email responses. Incorrectly spelled words are underlined in red and can be corrected via a right-click menu.

Ignite's spell check button is located in the formatting toolbar, along with additional formatting options. Ignite's spell checking function assists agents in sending polished responses to customers.

NOTE:

- Russian and Mandarin Chinese are not supported.
- Grammar checking is not supported.

The following explains how to

- Correct spelling in email responses
- Ignore flagged words
- Undo spell checking changes
- Change the dictionary's language
- Add words to your personal dictionary
- Clear additions to your personal dictionary
- Toggle spell checking on or off

To correct spelling in an email response

- Right-click an underlined word and select the correct spelling from the list provided.

To ignore flagged words

- Right-click an underlined word and select **Ignore**.

To undo spell checking changes

NOTE: This function reverts words to their original spelling. It does not clear additions made to the dictionary.

- In the Ignite formatting toolbar, click the **Undo** button.

To change the dictionary's language

- In the Ignite formatting toolbar, from the dictionary language drop-down list, select a language. See the following figure.

  NOTE: Ignite remembers this selection for future replies.

To add words to your personal dictionary

- Right-click an underlined word and select **Add to personal dictionary**.

To clear additions to your personal dictionary

NOTE: This option clears all additions to your personal dictionary.

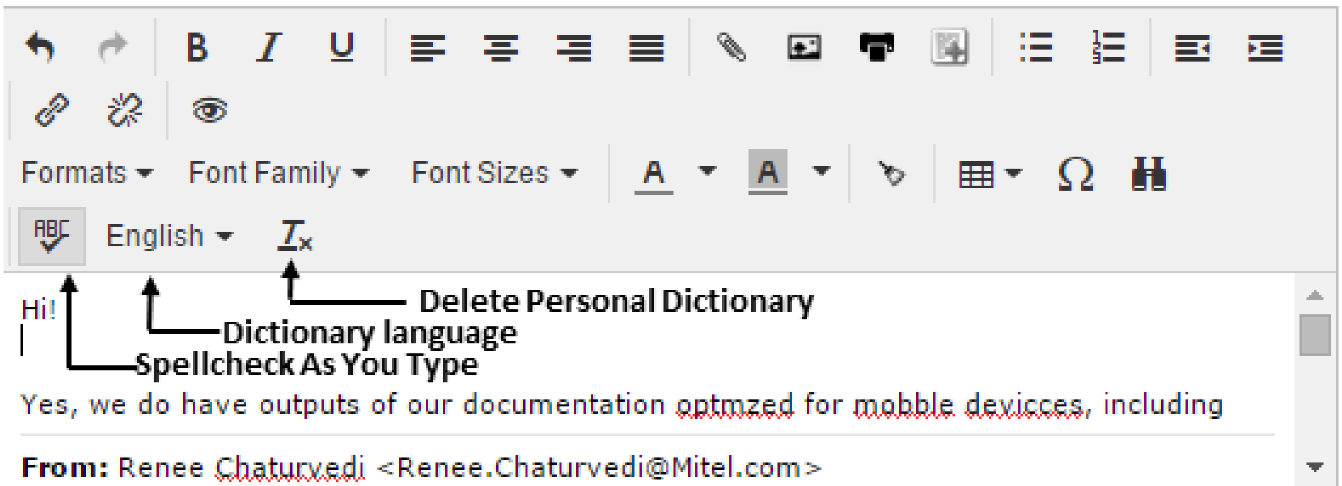
1) In the Ignite formatting toolbar, click the **Delete Personal Dictionary** button. (See the following figure.)
2) Either refresh the page or log out of Ignite and log back in for the changes to take effect.

To toggle spell checking on or off

- Click the **Spellcheck As You Type** button. (See the following figure.)

  NOTE: Ignite remembers this selection for future replies.

Figure 13: Spell check options



Applying reply templates to emails

Agents can apply reply templates to emails, providing standardized responses to common questions and requests. Once applied, responses can be edited as required. Also, click refresh to view and apply the recently created reply templates.

The following procedures explain how to

- Apply reply templates to emails using file name or predictive text
- Apply reply templates by browsing and selecting

To apply reply templates to emails using file name or predictive text

1) When an email is in reply mode, place the cursor in the body of the email response.
2) On the formatting toolbar, click the **Insert Reply Template** button.
3) In the **Insert Reply Template** window, begin typing the file name or the text that the template contains. Templates matching the file name or the text will display.
4) To insert the template, in the **Insert Reply Template** window, click the template you want to insert and click **Insert**. The text is inserted in the email, at the cursor point.
5) Optionally, delete the text from the window and repeat the above steps.

To apply reply templates by selecting the templates from the list (WEB)

1) When an email is in reply mode, place the cursor in the body of the email response.
2) On the formatting toolbar, click the **Insert Reply Template** button.
3) From the **Insert Reply Templates** window, select the reply template you want to apply from the list and click **Insert** button.
4) Reply template is inserted in the email, at the cursor point.
5) Optionally, delete the text from the window and repeat the above steps.

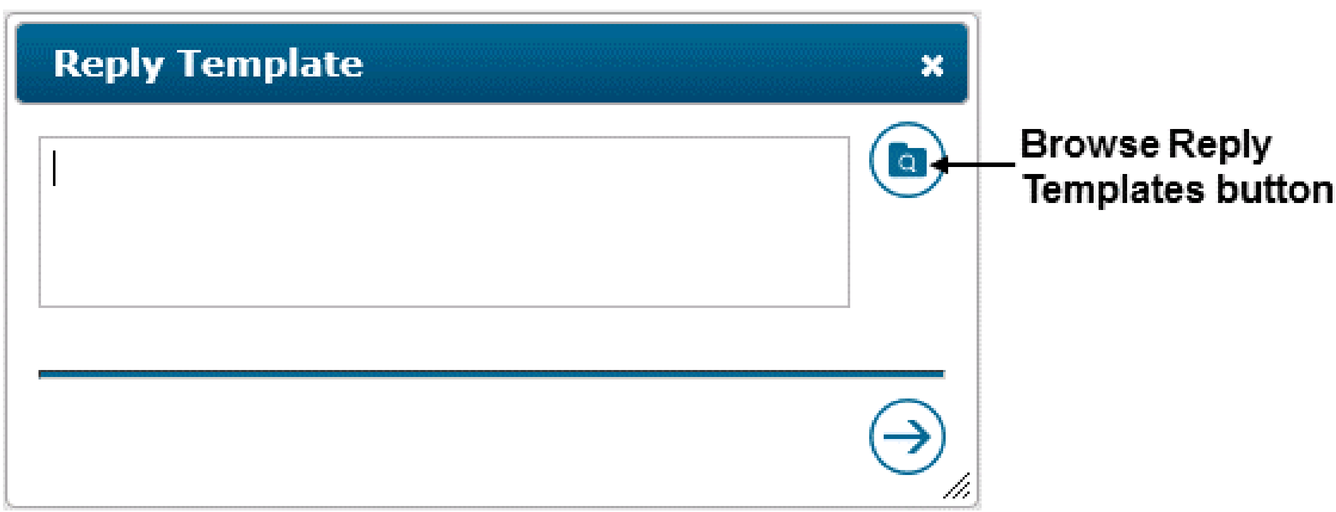
To apply reply templates by browsing and selecting (DESKTOP)

1) When an email is in reply mode, place the cursor in the body of the email response.
2) On the formatting toolbar, click the **Reply Template** button.
3) In the **Reply Template** window, click the **Browse Reply Templates** button.
   See the following figure.
4) From the **Browse Reply Templates** window, select the template from the options listed.
5) To insert the text, in the **Reply Template** window, click the **check mark** icon. The text is inserted in the email, at the cursor point.
6) Optionally, delete the text from the window and repeat the above steps.

NOTE:

- The image must be in .jpg format while using a messaging file in the reply template.
- The Chat reply templates must be saved in UTF-8 encoding or Unicode encoding.

Figure 14: Browse Reply Templates button



Applying personal reply templates to emails

Applying personal reply templates to emails enables you to provide standardized responses to common questions and requests. For information on creating a personal reply template, see *"Tools (WEB)"*

To apply reply templates to emails

1) When an email is in reply mode, place the cursor in the body of the email response.
2) On the formatting toolbar, click the **Insert Reply Template** button.
3) In the **Insert Reply Template** window, from the list of reply templates, type to search for a reply template that you want to insert, or, click the reply template you want to select from the list.
4) Optionally, click **Preview** to preview the selected reply template before inserting.
5) Click **Insert**.

   The reply template is inserted in the email, at the cursor point.

Applying personalized signatures to emails

If allowed, agents can apply personalized signatures to emails. Personalized signatures can be created as templates, which can then be applied to email responses. For more information, see *"Applying reply templates to emails"*. Once applied, signatures can be edited as required. Agents can also cut-and-paste signatures into emails.

NOTE: Creating templates is an administrative configuration. For information on whether personalized signatures are allowed, contact your supervisor or system administrator.

Applying quick reply templates to emails

When responding to an email interaction, you can quickly access an existing reply template used. When using Ignite from the desktop, you can select from the five most recently used templates. When using Ignite from a hand-held device, only the three most recently used templates are available.

To apply a recently used template to an email response

1) Click **Inbox**, select an email, or hover over the item avatar, and click **Reply** or **Reply All**.

   The most recently used templates display at the bottom of the window.
2) Click the reply template you want to insert into the email response.

To disable quick reply templates

1) Click **Options > Email**.
2) Under **Quick reply templates**, toggle the switch to gray.

   NOTE: Quick reply templates is enabled by default, The **Clear quick reply templates view after insert** is disabled when you disable the quick reply templates.

Rerouting failed emails

If emails fail to route, they are stored in Ignite’s Failed folder (DESKTOP) or in the History page under Failed (WEB). Ignite’s Reroute button removes emails from these locations and attempts to transfer them back to the queue.

Agents may also mark these emails as Junk or forward the email. Forwarding emails from Failed does not remove the original copy from these locations. Forwards in progress are housed in the agent's personal Drafts folder (DESKTOP), in the Forward subfolder (DESKTOP) or in the Inbox (WEB). If you reroute an email that has existing forward drafts, the drafts will be deleted.

For information on handling bounced and oversized emails, see *"Handling bounced emails"* and *"Handling oversized emails"*.

We recommend that agents and supervisors check Ignite frequently in order to reroute emails that failed to route.

- DESKTOP - Under Processed, supervisors may see all emails that failed to route. Agents may only see emails sent to the queues for which they answer.
- WEB - In History > Failed, supervisors will see all emails that failed to route. Agents may only see emails sent to the queues for which they answer.
- While rerouting emails removes them from Failed immediately, there may be a delay before the emails are transferred back to the queue.
- Agents may only Junk interactions if they have the appropriate permissions.

To reroute emails in the Failed folder (DESKTOP)

1) In the **My Folders** view, expand the **Folders** pane.
2) In the **Folders** pane, select a **Failed** folder.
3) In the **List** pane, select an email and, in the **Action** bar, click **Reroute**. Alternatively, click **Junk** to mark the email as Junk and remove it from the Failed folder or click **Forward** to send the email to a recipient.

To reroute emails from Failed (WEB)

1) Click **History > Failed**.
2) Select an email or hover over the item avatar and click either **Reroute**, **Junk**, or **Forward**.

   If you select 'Forward,' the interaction is delivered to the Inbox where you can specify recipients.

Handling oversized emails

Depending on administrative settings, an error message displays if you attempt to send an email that exceeds the maximum message size. You can then edit the email to reduce its size and attempt to resend the email.

If administrative settings do not match the limits of your organization's mail server, you may not receive the error message. Subsequently, Ignite displays the following behavior:

- DESKTOP - The email fails to send and displays in the Failed to Send subfolder (contained in the Failed folder), where it can be selected, edited to reduce its size, and re-sent. Failed to Send emails also display in the supervisor's Failed to Send folder, where they can optionally edit and resend them if the associated agent is inactive.
- When there are items in the Failed to Send subfolder, the font color of this folder name, and of the parent Failed folder, display in red, followed by a number indicating how many active items currently reside in the folder.
- WEB - The email fails to send and displays in the Inbox where it can be selected, edited to reduce its size, and re-sent. Items that fail to send are marked in red and a failure message displays. Supervisors can also view these items in History.

Handling bounced emails

Depending on administrative settings, you may be required to handle bounced emails. These are sent emails that failed to route due to out of office auto-responses, lack of space in the receiver's inbox, delays caused by the mail server, and invalid addresses.

If your system is configured to support bounced email detection, and you have one or more bounced emails pending, Ignite displays the following behavior:

- DESKTOP - The number of bounced items displays beside your Auto Replies/Failed Delivery subfolder (contained in the Failed folder). The font color of this folder name, and of the parent Failed folder, displays in red. You can select an item and either Junk or forward it.
- WEB - Bounced items display in the Inbox and are marked in red, with 'Auto-Reply' text. You can select an item and either Junk or forward it. Supervisors can also view these items in History.

Sending outbound emails

NOTE:

- Real-time and reporting statistics are not available for outbound email activity at this time. We recommend instead that agents put themselves into Busy/Make Busy, with an 'Outbound email' Reason Code applied, when drafting outbound emails. Make Busy reports and real-time queue statistics will then display time spent drafting outbound emails.
- If contact centers use preferred agent routing, we recommend that agents do not adjust case and ticket numbers in email subject lines. Removing or otherwise altering case and ticket numbers in subject lines can interfere with preferred agent routing.

DESKTOP - Outbound emails in progress are housed in the agent's personal Drafts folder, in the New Emails subfolder. This functionality is available to employees with email agents answering for queues. Agents can only send outbound emails from the email queues for which they answer.

WEB - Outbound emails in progress are housed in the Inbox, marked as 'Draft'.

By default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.

Queue signatures are automatically inserted in outbound emails, if signatures are configured for the queue. Queue signatures are inserted each time a queue is selected as the 'From' address.

If you are permitted to use personalized signatures in outbound emails, see *"Applying personalized signatures to emails"*.

Agents can perform common email functions when sending outbound emails, including inserting images, attachments, and applying reply templates to email drafts. See the appropriate topics in this guide for applicable procedures.

Outbound email functionality supports preferred agent routing, to enable ongoing interactions between agents and email recipients.

The following procedures explain how to

- Send outbound emails
- Discard outbound emails in progress
- Search for outbound emails

To send an outbound email (DESKTOP)

NOTE: Account codes are not supported for outbound emails.

1) In the **My Folders** view, expand the **Folders** pane.
2) In the **Action** bar, click **New Email**.
3) In the **Preview** pane, click **From…** and select an email queue.

   NOTE: Queue signatures are inserted each time a queue is selected as the 'From' address.
4) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
5) Type the email's contents and, in the **Action** bar, click **Send** . An icon displays over the Preview pane, indicating the email is being sent.

   The email queue signature is inserted in the draft email.

To send an outbound email (WEB)

1) Click **Contacts**.
2) If the email destination is not a recent contact, type the email address in the **Search** field.
3) Hover over the appropriate address and click the **Email** icon. For emails to agents, a colored dot on the avatar indicates its availability.

   *The system checks if the selected contact is associated with any open cases and if there is an existing open case, the **Reusable case found** dialog is displayed with the details of the most recent open case for that contact. You can view the case information such as Case ID, subject and the email body and decide if you want to reuse the existing Case ID for this email. To reuse the Case ID, click **Yes**, else, click **No**.*

NOTE: If you do not wish to search for reusable cases in future, click the **Disable searching for reusable cases in the future** check box. You can enable or disable the option to search for reusable cases on the **Options > Customization** page.

4) In the new draft, click **From…** and select an email queue.

   NOTE: Queue signatures are inserted each time a queue is selected as the 'From' address. Agents are responsible for deleting non-applicable queue signatures from outbound email drafts.
5) You can alternatively search for contacts and their associated email addresses by clicking the **To:**, **CC:**, or **Bcc:** buttons. In the Contacts dialog box, select the required contacts, the email address are auto-entered in the appropriate fields.
6) Type the email's contents and click **Send**.

   NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

To discard an outbound email in progress (DESKTOP)

1) In the **My Folders** view, expand the **Folders** pane.
2) In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3) Expand the **Drafts** folder and select **New Emails**
4) In the **List** pane, select the outbound email and, in the **Action** bar, click **Discard Draft**.
5) To search for an outbound email in the Drafts folder, see the procedure below.

To discard an outbound email in progress (WEB)

NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

- Click **Inbox** and select a draft or hover over the item avatar and click **Discard**.

To search for an outbound email in the Drafts folder (DESKTOP)

NOTE: The Drafts folder contains the agent's emails in progress. To search for sent outbound emails, search the Sent folder.

1) In the **My Folders** view, expand the **Folders** pane.
2) In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3) Expand the **Drafts** folder and select **New Emails**.
4) If required, in the **Search** field, click the **x** button to clear the pane.
5) In the **Search** field, type keywords over the ghost text.

   See "Searching Ignite" for detailed search information and procedures.

To search for an outbound email (WEB)

1) Click **History** and select **Sent**.
2) In the search field, type keywords over the ghost text.

   See "Performing keyword searches" for detailed search information and procedures.

Handling SMS in Ignite

Handling SMS in Ignite mirrors common instant messaging applications, providing a familiar and user-friendly experience.

SMS sessions are initiated by customers using contact information or, optionally, through the contact center’s SMS request page or corporate website. SMS interactions are then routed to appropriate queues.

Interactions are automatically sent to your Inbox if you are the longest idle agent or the agent with the highest skill level in your agent group, if your agent group uses skill levels. Agents can also pick SMS interactions out of queue.

NOTE:

- SMS agent responses cannot contain more than 320 characters.
- Preferred agent routing is not supported.

The following explains how to:

- Preview SMS interactions
- Pick SMS interactions out of queues
- Join an SMS session
- Reply to SMS interactions
- Decline SMS interactions
- Correct spelling in SMS responses
- Apply reply templates to SMS responses
- Place SMS sessions on hold and retrieve SMS sessions from hold
- Transition to alternate interaction types

- Join the longest waiting active SMS session (DESKTOP)
- Transfer SMS interactions
- End SMS sessions
- Forward SMS transcripts
- Remove Failed SMS transcripts from Ignite
- Mark SMS interactions as No Reply and Junk
- Send outbound SMS interactions

NOTE: DESKTOP - To complete the following procedures, you must be in Ignite's My Folder's View.

Previewing SMS interactions

If administrative configurations permit, agents can preview interactions before picking them out of queue or handling them.

The following explains how to

- Preview SMS interactions in the Inbox
- Preview SMS interactions in queue

To preview an SMS interaction in the Inbox (DESKTOP)

1) From the **Folders** pane, click **Inbox**.
2) From the **List** pane, select the SMS interaction to preview.
   The SMS interaction displays in the Preview pane.

To preview an SMS interaction in the Inbox (WEB)

- Click **Inbox** and select an SMS to preview.

To preview an SMS interaction in queue (DESKTOP)

1) From the **Folders** pane, click a queue.
2) From the **List** pane, select the SMS interaction to preview.
   The SMS interaction displays in the Preview pane.

To preview an SMS interaction in queue (WEB)

1) Click **Queues** and select a queue.
2) Select an SMS to preview.

Picking SMS interactions out of queue

Pick behavior occurs in the following ways:

First, agents can pick interactions out of queue and send them to the Inbox. When the interactions ring in the Inbox, agents can handle them.

Second, agents can choose to pick and reply to an interaction. Choosing to pick and reply to an interaction sends the interaction to the agent's Inbox from where the agents can handle the interaction.

SMS interactions picked out of queue ring in the Inbox until the interaction is accepted. For more information on ringing behavior, see *"Ringing states in Ignite"*.

NOTE:

- Agents cannot pick or pick and reply to interactions from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to interactions from the queue if they have the appropriate permissions.

The following procedures explain how to

- Pick an SMS interaction out of queue and handle the SMS
- Pick and automatically reply to an SMS

To pick an SMS out of queue and handle the SMS (DESKTOP)

1) From the **Folders** pane, select the queue from which an interaction will be picked.
2) From the **List** pane, select an SMS interaction from the queue and, from the **Action** bar, click the **Pick** button.

   The SMS interaction is transferred to your Inbox.
3) To handle the SMS interaction, select **Inbox** and, in the **List** pane, select the SMS interaction.

   NOTE: Additional handling options display in the Action bar. For information on handling the SMS interaction, see the appropriate procedures in this section.

To pick an SMS out of queue and handle the SMS (WEB)

1) Click **Queues** and select the appropriate queue.
2) Select an interaction or hover over the item avatar and click **Pick > Pick**.

   The SMS is transferred to your Inbox.
3) To handle the SMS, click **Inbox** and select the SMS or hover over the item avatar.

To pick and automatically reply to an SMS (DESKTOP)

1) In the **Folders** pane, select the queue from which an SMS interaction will be picked.
2) In the **List** pane, select an SMS interaction from the queue and, from the **Action** bar, click the **Pick & Reply** button.

   The SMS interaction is transferred to your Inbox.
3) In the **Preview** pane, agents can respond to the SMS interaction, transfer the SMS interaction to another destination, or put the SMS interaction on hold.

   NOTE: Additional handling options display in the Action bar. For information on handling the SMS interaction, see the appropriate procedures in this section.

To pick and automatically reply to an SMS (WEB)

1) Click **Queues** and select the appropriate queue.
2) Select an interaction or hover over the item avatar and click **Pick > Pick and Reply**.

   The SMS is transferred to your Inbox and opens in reply mode.

Joining SMS sessions

When an SMS interaction arrives in an agent’s Inbox, agents can join the session and start responding to the interaction.

Agents can join sessions via Ignite's toaster or UI.

To join an SMS session (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select an SMS interaction and, in the **Action** bar, click **Reply**.
3) In the **Preview** pane, agents can respond to the SMS interaction, transfer the SMS interaction to another destination, or put the SMS session on hold.

   NOTE: Additional handling options display in the Action bar. For information on handling the SMS interaction, see the appropriate procedures in this section.

To join an SMS session (WEB)

- Click **Inbox** and select an SMS session or hover over the item avatar and click **Accept**.

Replying to SMS interactions

Once an SMS interaction is in the Inbox, agents can reply to or otherwise handle it.

After you join an SMS session, Ignite goes into Reply mode and the Input pane displays, enabling you to reply to the interaction. Send responses using the arrow button.

Declining SMS interactions

Agents can decline an offered SMS interaction, sending the interaction back to the queue where it retains its queue priority.

Agents can decline sessions via Ignite's toaster or UI.

NOTE: When an agent declines an interaction, they are automatically put into Busy/Make Busy across all media capabilities. A System Make Busy and a requeue count is registered for the employee . For more information, see *"Setting and removing Busy/Make Busy in Ignite"*.

To decline an SMS interaction (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select an SMS interaction and, in the **Action** bar, click **Decline**.

To decline an SMS interaction (WEB)

- Click **Inbox** and select an SMS interaction or hover over the item avatar and click **Decline**.

Correcting spelling in SMS responses

Ignite provides automatic spell checking of SMS responses, assisting agents in sending polished, professional, and consistent content to customers. Incorrectly spelled words are underlined in red and can be corrected using a right-click menu.

The spell check button is located in the formatting toolbar, along with additional formatting options.

NOTE:

- Russian and Mandarin Chinese are not supported.
- Grammar checking is not supported.

The following explains how to

- Correct spelling in SMS responses

- Ignore flagged words
- Undo spell checking changes
- Change the dictionary's language
- Add words to your personal dictionary
- Clear additions to your personal dictionary
- Toggle spell checking on or off

To correct spelling in an SMS response

- Right-click an underlined word and select the correct spelling from the list provided.

To ignore flagged words

- Right-click an underlined word and select **Ignore**.

To undo spell checking changes

NOTE: This function reverts words to their original spelling. It does not clear additions made to the dictionary.

- In the Ignite formatting toolbar, click the **Undo** button.

To change the dictionary's language

- In the Ignite formatting toolbar, from the dictionary language drop-down list, select a language. See the following figure.

  NOTE: Ignite remembers this selection for future SMS sessions.

To add words to your personal dictionary

- Right-click an underlined word and select **Add to personal dictionary**.

To clear additions to your personal dictionary

NOTE: This option clears all additions to your personal dictionary.

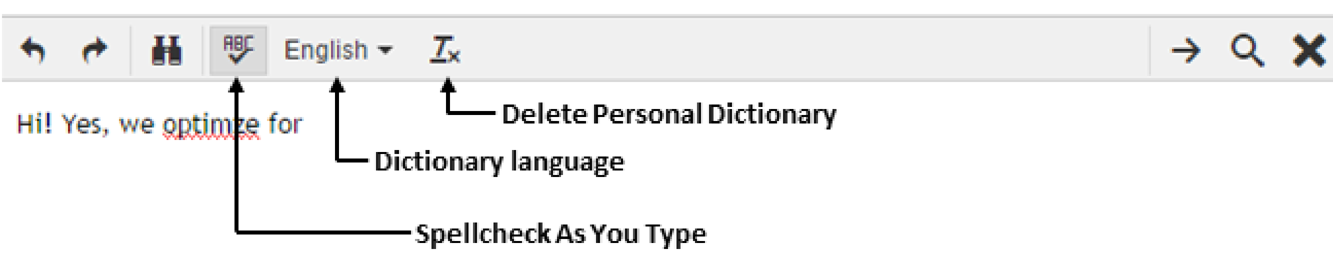
1) In the Ignite formatting toolbar, click the **Delete Personal Dictionary** button. (See the following figure.)
2) Either refresh the page or log out of Ignite and log back in for the changes to take effect.

To toggle spell checking on or off

- Click the **Spellcheck As You Type button**. (See the following figure.)

  NOTE: Ignite remembers this selection for future SMS sessions.

Figure 15: Spell check options in the Input pane



Applying reply templates to SMS responses

Agents can apply templates to their SMS responses, providing standardized responses to common questions and requests.

To apply a reply template to an SMS response

1) When an SMS interaction is in reply mode, place the cursor in the body of the response.
2) Click the **Browse Reply Templates** button.
   The Browse Reply Template button displays as a magnifying glass in the formatting toolbar.
3) Type the text that the template contains.
   Templates matching the text display.
4) Select a template text from the list provided.
5) Press **Enter** and click **Insert Template**.
   Template mode changes back to Reply mode.
6) Click **Send Message** to send the message with the template.

Placing SMS sessions on hold and retrieving SMS sessions from hold

At times, agents may have to stop participating in an SMS session in order to work on other items. In these cases, agents can put the active SMS session on hold. Interactions on hold are marked with a 'pause' icon.

Note that administrative configurations may limit how long interactions may be on hold before being requeued and a System Make Busy is registered for the employee. For information on this limit, contact your supervisor or system administrator.

The following procedures explain how to

- Place an SMS session on hold
- Retrieve an SMS from hold

To place an SMS session on hold (DESKTOP)

- When participating in an SMS session, click the **Hold** button.

To place an SMS session on hold (WEB)

- Click **Inbox** and select the SMS or hover over the item avatar and click **Hold**.

To retrieve an SMS session from hold (DESKTOP)

NOTE: You can also retrieve a session from hold by sending a response.

1) Select the **Inbox** and, in the **List** pane, select the SMS interaction on hold.
2) In the **Action** bar, click **Remove hold**.

To retrieve an SMS session from hold (WEB)

NOTE: You can also retrieve a session from hold by sending a response.

- Click **Inbox** and select an SMS on hold or hover over the item avatar and click **Remove Hold**.

Transition to alternate conversation types

During an interaction, agents can transition to an alternate interaction type if the agent is associated with that media type and if the customer's relevant contact details are available. Agents can also edit contact information during an interaction.

See the *"Transitioning from one conversation type to another (WEB)"* section in this guide.

Joining the longest waiting active SMS session (DESKTOP)

Agents can switch between active SMS sessions according to how long the customer has been waiting for a response by using the 'Next Longest' button in the Action bar. The 'Next Longest' button applies to all active interactions in the agent's Inbox, directing agents to the SMS session that has been open and unfinished the longest.

For example, an agent is handling three different SMS sessions. Clicking 'Next Longest' highlights the active SMS session that has been waiting the longest for a response and switches that interaction back into the Active Contact pane.

When switching between active interactions, the SMS session indicates that the agent is joining and leaving the SMS session as appropriate.

To reply to the longest waiting active SMS session

1) In the **Folders** pane, select **Inbox**.
2) In the **List** pane, select an active SMS session.

   An active SMS session is one that is no longer ringing and has been joined.
3) In the **Action** bar, click **Next Longest**.

   The system takes you to the next longest waiting active SMS session in the Inbox.

Transferring SMS interactions

SMS interactions can be transferred to agents and queues. For example, agents in the Support queue receiving inquiries about a product invoice can transfer these interactions to the Sales queue. To receive transfers, devices must be enabled to handle the interaction's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is unknown cannot receive transferred SMS interactions. Agents who are either in Busy/Make Busy or at their SMS Workload limit can receive transferred SMS interactions.

NOTE: You may only transfer interactions if you have the appropriate permissions.

To transfer an SMS interaction (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select an SMS interaction and, in the **Action** bar, click **Reply**.
3) In the **Action** bar, click **Transfer**.
4) Select an agent or a queue.

NOTE: You can search for a transfer destination by typing the name of an agent or queue in the **Search** field.

5) Click **Transfer**.

To transfer an SMS interaction (WEB)

1) Click **Inbox** and select an SMS interaction or hover over the item avatar and click **Accept**.

   To transfer directly from the queue, click Queues.

   *To transfer from the **Cases** page, under **Interactions** tab, select the inqueue or inbox SMS and click **Goto** icon. The Queues page is displayed. You can now transfer the SMS from the **Queues** page. Follow steps 3 onward.*

2) Select the SMS or hover over the item avatar and click **Transfer** icon.

NOTE: Optionally you can select multiple SMS from the **Inbox** or the **Queues** page and click **Transfer**. The Transfer window is displayed. The list of available Employees and Queues are displayed in the **Results** section.

3) To transfer to an agent, in the **Transfer** window click **Employees**, select an employee from the list and proceed to step 5.
4) To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list.
5) To transfer the SMS interaction, select the name of the appropriate person or queue.

Ending SMS sessions

When an agent is finished handling an interaction, the agent can end the SMS session.

To end an SMS session (DESKTOP and WEB)

1) When participating in an active SMS session, click the **End Your Session** button.

   The 'End Your Session' button displays as an X.

2) When prompted, click **Yes**.

Forwarding SMS transcripts

You can forward SMS transcripts to multiple parties as an email with additional recipients copied and blind-copied.

Forwards in progress are housed in the agent's personal Drafts folder (DESKTOP), in the Forward subfolder (DESKTOP) or in the Inbox (WEB).

DESKTOP - You can only forward SMS transcripts from the My History folder and its Handled subfolder, from the History folder and its Handled subfolder, and from the Failed folders.

WEB - You can forward SMS transcripts from the History page.

The following procedures explain how to

- Forward an SMS transcript
- Discard forwards in progress

To forward an SMS transcript (DESKTOP)

1) In the **Folders** pane, select either **History**, **My History**, one of the **Handled** subfolders, or one of the **Failed** folders.
2) In the **List** pane, select an SMS transcript and, in the **Action** bar, click **Forward**.
3) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.

4) Click **Send**. An icon displays over the Preview pane, indicating the transcript is being sent.

NOTE: If you attempt to forward a transcript and receive a warning that the email address is invalid, the queue that handled the SMS interaction may not have been configured for sending transcripts. Contact your supervisor or system administrator.

To forward an SMS transcript (WEB)

1) Click **History** and, optionally, select a **Filter:**.
2) Select an SMS transcript or hover over the item and click **Forward**.
3) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4) Click **Send**.

To discard a forward in progress (DESKTOP)

NOTE: You can also discard forwards in progress by clicking ‘Discard Draft’ in the Action bar instead of ‘Send’.

1) In the **My Folders** view, expand the **Folders** pane.
2) In the **Folders** pane, click **Drafts.** If necessary, expand the **My Folders** folder first.
3) Expand the **Drafts** folder and select **Forward**.
4) In the **List** pane, select the transcript and, in the **Action** bar, click **Discard Draft**.

To discard a forward in progress (WEB)

- Click **Inbox** and either select the forward in progress or hover over the item avatar and click **Discard**.

Removing failed SMS transcripts from Ignite

Occasionally, SMS transcripts may route to 'Failed' in Ignite. You can remove these transcripts using Ignite’s Junk button.

NOTE: Agents may only Junk interactions if they have the appropriate permissions.

To remove a failed SMS transcript from Ignite (DESKTOP)

1) In the **Folders** pane, select a Failed folder.
2) In the **List** pane, select an SMS transcript and, in the **Action** bar, click either **Forward** or **Junk**.
3) To remove a failed SMS transcript from Ignite (WEB)
4) Click **History > Failed**.
5) Select an SMS transcript or hover over the item avatar and click either **Junk** or **Forward**.

   If you select 'Forward,' the interaction is delivered to the Inbox where you can specify recipients.

Marking SMS interactions as No Reply and Junk

Occasionally, SMS interactions requiring no reply reach queues and agents’ Inboxes. Agents can mark these SMS interactions either as requiring no reply or as junk.

Agents can also junk SMS interactions directly from 'Failed', rather than attempting to reroute them.

Marking interactions as No Reply and Junk removes the interactions from Ignite. If the item is in queue or the Inbox, responses in progress are deleted.

NOTE:

- Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- Agents may only Junk interactions if they have the appropriate permissions.

To mark an SMS interaction as No Reply or Junk (DESKTOP)

1) In the **Folders** pane, either click **Inbox**, select the queue in which the SMS message is waiting, or select a **Failed** folder.
2) In the **List** pane, select an SMS message and, in the **Action** bar, click either **No Reply** or **Junk**.

To mark an SMS interaction as No Reply or Junk from the Inbox (WEB)

- Click **Inbox** and select an SMS interaction or hover over the item avatar and click either **No Reply** or **Junk**.

To mark an SMS interaction as No Reply or Junk from the queue (WEB)

1) Click **Queues** and select an SMS queue.
2) Select an SMS interaction and click either **No Reply** or **Junk**.

Sending outbound SMS interactions

Agents can send outbound SMS interactions in Ignite. When an agent sends an outbound SMS interaction, they may not be the agent who receives the customer response.

- You cannot send an SMS to multiple recipients.
- Account codes are not supported for outbound SMS interactions.
- Real-time and reporting statistics are not available for outbound SMS activity. We recommend instead that agents put themselves into Busy/Make Busy, with an ‘Outbound SMS’ Reason Code applied, when drafting outbound SMS interactions. Make Busy reports and real-time queue statistics will then display time spent drafting outbound SMS interactions.

WEB– Outbound SMS interactions in progress are housed in the Inbox, marked as 'Draft'.

To send an outbound SMS interaction (DESKTOP)

1) In the **My Folders** view, expand the **Folders** pane.
2) In the **Action** bar, click **New SMS**.
3) After **From**, select an SMS queue.
4) After **To**, type the recipient’s number.
5) Type the SMS interaction's contents and click **Send**.

To send an outbound SMS interaction (WEB)

1) Click **Contacts**
2) If the destination is not a recent interaction, type its name or number in the **Search** field.
3) Hover over the destination's avatar and click the **SMS** icon. For SMS;interactions to agents, a colored dot on the avatar indicates its availability.
4) Under **From (queue)**, select an SMS queue.

NOTE: Queue signatures are inserted each time a queue is selected as the 'From' address. Agents are responsible for deleting non-applicable queue signatures from outbound SMS drafts.

5) Type the SMS interaction's contents and click **Send**.

A new case is automatically created and assigned with "Waiting For Customer" state.

NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

To discard an outbound SMS interaction in progress (WEB)

NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

- Click **Inbox** and select a draft or hover over the item avatar and click **Discard**.

Handling chats in Ignite

NOTE: If you are using Contact Center Messenger Chat, for more information see *"Handling Contact Center Messenger in Ignite"*

Handling chats in Ignite mirrors common instant messaging applications, providing a familiar and user-friendly experience. Chat sessions are initiated by customers via your contact center's chat request page or corporate website.

Interactions are automatically sent to your Inbox if you are the longest idle agent, the preferred agent, or the agent with the highest skill level in your agent group, if your agent group uses skill levels. Agents can also pick chat interactions out of queue.

The following explains how to:

- Preview chat interactions
- Pick chat requests out of queues
- Join chat sessions
- Decline chat interactions
- Chat with customers
- Transition to alternate interaction types
- Correct spelling in chat responses
- Apply reply templates to chat responses
- Place chat sessions on hold and retrieve chat sessions from hold
- Join the longest waiting active chat session (DESKTOP)
- Transfer chats
- Leave chat sessions
- Forward chat transcripts
- Remove Failed chat transcripts from Ignite

NOTE: DESKTOP - To complete the following procedures, you must be in Ignite's My Folder's View.

Previewing chat interactions

If administrative configurations permit, agents can preview interactions before picking them out of queue or handling them.

The following explains how to

- Preview chat interactions waiting in the Inbox
- Preview chats waiting in queue

To preview a chat interaction in your Inbox (DESKTOP)

1) From the **Folders** pane, click **Inbox**.
2) From the **List** pane, select the chat interaction to preview.
   The chat interaction displays in the Preview pane.

To preview a chat interaction in your Inbox (WEB)

- Click **Inbox** and select a chat to preview.

To preview a chat interaction waiting in queue (DESKTOP)

1) From the **Folders** pane, click a queue.
2) From the **List** pane, select the chat interaction to preview.
   The chat interaction displays in the Preview pane.

To preview a chat interaction waiting in queue (WEB)

1) Click **Queues** and select a queue.
2) Select a chat interaction to preview.

Picking chat requests out of queue

Pick behavior occurs in the following ways: First, agents can pick interactions out of queue and send them to the Inbox. When the interactions ring in the Inbox, agents can handle them. Second, agents can choose to pick and reply to an interaction. Choosing to pick and reply to an interaction sends the interaction to the agent's Inbox from where the agents can handle the interaction.

Chat interactions picked out of queue ring in the Inbox until the interaction is accepted. For more information on ringing behavior, see *"Ringing states in Ignite"*.

NOTE:

- Agents cannot pick or pick and reply to interactions from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to interactions from the queue if they have the appropriate permissions.

The following procedures explain how to

- Pick a chat request out of a queue
- Pick and automatically join a chat session

To pick a chat request out of a queue (DESKTOP)

1) From the **Folders** pane, select the queue from which an interaction will be picked.
2) From the **List** pane, select a chat from the queue and, from the **Action** bar, click the **Pick** button.
   The chat is transferred to your Inbox.
3) To handle the chat, select **Inbox** and, in the **List** pane, select the chat.

NOTE: Additional handling options display in the Action bar. For information on handling the chat, see the appropriate procedures in this section.

To pick a chat request out of a queue (WEB)

1) Click **Queues** and select a queue.
2) Select an interaction or hover over the item avatar and click **Pick > Pick**.

   The chat is transferred to your Inbox.
3) To handle the chat, click **Inbox** and select the chat or hover over the item avatar.

To pick and automatically join a chat session (DESKTOP)

1) In the **Folders** pane, select the queue from which a chat will be picked.
2) In the **List** pane, select a chat from the queue and, from the **Action** bar, click the **Pick & Reply** button.

   The chat is transferred to your Inbox.
3) In the **Preview** pane, agents can respond to the chat, transfer the chat to another destination, or put the chat session on hold.

   NOTE: Additional handling options display in the Action bar. For information on handling the chat, see the appropriate procedures in this section.

To pick and automatically join a chat session (WEB)

1) Click **Queues** and select a queue.
2) Select an interaction or hover over the item avatar and click **Pick > Pick and Reply**.

   The interaction is transferred to your Inbox and opens in reply mode.

Joining chat sessions

When a chat session arrives in an agent's Inbox, agents can join the session and start responding to the interaction.

Agents can join sessions via Ignite's toaster or UI.

To join a chat session (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select a chat session and, in the **Action** bar, click **Reply**.
3) In the **Preview** pane, agents can respond to the chat, transfer the chat to another destination, or put the chat session on hold.

   NOTE: Additional handling options display in the Action bar. For information on handling the chat, see the appropriate procedures in this section.

To join a chat session (WEB)

- Click **Inbox** and select a chat session or hover over the item avatar and click **Accept**.

Declining chat interactions

Agents can decline a chat interaction in their Inbox, sending the chat back to the queue where it retains its queue priority.

Agents can decline sessions via Ignite's toaster or UI.

NOTE: When an agent declines an interaction, they are automatically put into Busy/Make Busy across all media capabilities. A System Make Busy and a requeue count is registered for the employee . For more information, see *"Setting and removing Busy/Make Busy in Ignite"*.

To decline a chat interaction (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select a chat and, in the **Action** bar, click **Decline**.

To decline a chat interaction(WEB)

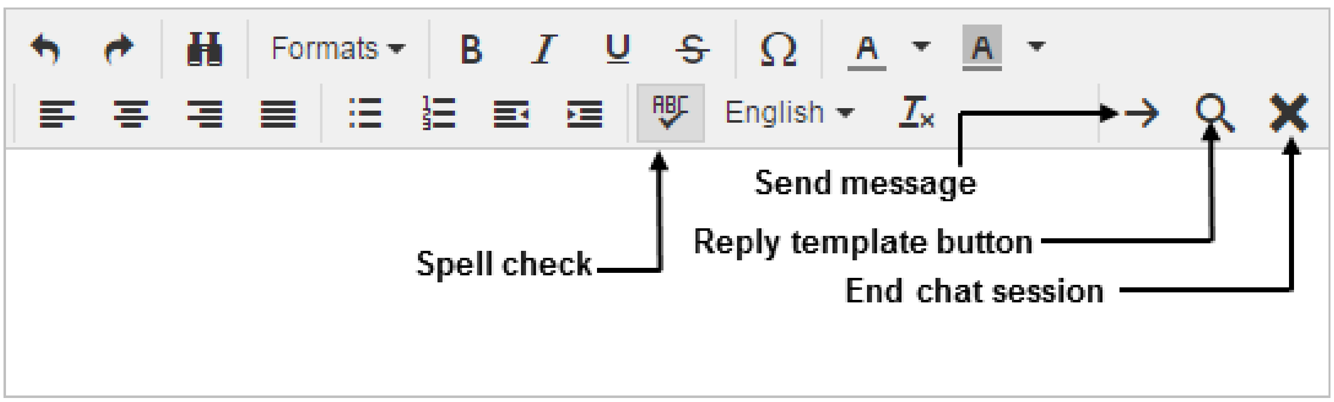
- Click **Inbox** and select a chat or hover over the item avatar and click **Decline**.

Chatting with customers

After you join a chat session, Ignite goes into Reply mode and the Input pane appears, enabling you to chat with the customer.

The following figure presents the Input pane during a chat session.

Figure 16: Chat Input pane



Ignite indicates to agents and customers that the other is typing a response. Ignite indicates that customers have sent a response in an active chat as follows:

- DESKTOP - When the Inbox is not in focus and a customer sends a message in an active chat, an orange indicator alerts agents and displays a number listing how many interactions are waiting for replies.
- WEB - When Ignite is not in focus, a notification indicates that the customer has entered a response. When Ignite is in focus but the active chat is not selected, an exclamation mark displays beside the interaction and a notification displays. Clicking a notification takes you to the relevant interaction.

  NOTE: Internet Explorer does not pop notifications when Ignite is not in focus.

Ignite permits content to be copied and pasted from other sources and turns URLS into hyperlinks.

Ignite supports embedding content from Google Maps in chat sessions. However, this requires the use of embed maps URL, available from Google Maps, to embed a Google map, such as:

```
<iframe
src="https://www.google.com/maps/embed?pb=!1m18!1m12!1m3!1d2804.50097880
3945!2d-
75.90911198444678!3d45.3386984790996!2m3!1f0!2f0!3f0!3m2!1i1024!2i768!4f
13.1!3m3!1m2!1s0
x4cd1fff1517da8a9%3A0xe6bc8a721e90f2a5!2sMitel+Networks!5e0!3m2!1sen!2su
s!4v144553122 7487" width="600" height="450" frameborder="0"
style="border:0" allowfullscreen&gt;&lt;/iframe>
```

Ignite also supports the 'Share' link from the following websites. Cutting and pasting URLs from the following sites embeds the content in a chat session.

- https://twitter.com/
- https://soundcloud.com
- http://www.youtube.com

If your message fails to send, a red icon displays beside the unsent message. To resend the message, you can copy and paste the message from your chat window or you can retype it.

To chat with an interaction (DESKTOP and WEB)

- Type a message in the **Input** pane and either press **Enter** or click the **Send Message** button.

Transition to alternate conversation types

During an interaction, agents can transition to an alternate interaction type if the agent is associated with that media type and if the customer's relevant contact details are available. Agents can also edit contact information during an interaction.

See the *"Transitioning from one conversation type to another (WEB)"* section in this guide.

Correcting spelling in chat responses

Ignite provides automatic spell checking of chat responses. Incorrectly spelled words are underlined in red and can be corrected via a right-click menu.

Ignite's spell check button is located in the formatting toolbar, along with additional formatting options. Ignite's spell checking function assists agents in sending polished responses to customers.

NOTE:

- Russian and Mandarin Chinese are not supported.
- Grammar checking is not supported

The following explains how to

- Correct spelling in chat responses
- Ignore flagged words
- Undo spell checking changes
- Change the dictionary's language
- Add words to your personal dictionary
- Clear additions to your personal dictionary
- Toggle spell checking off or on

To correct spelling in a chat response

- Right-click an underlined word and select the correct spelling from the list provided.

To ignore flagged words

- Right-click an underlined word and select **Ignore**.

To undo spell checking changes

NOTE: This function reverts words to their original spelling. It does not clear additions made to the dictionary.

- In the Ignite formatting toolbar, click the **Undo** button.

To change the dictionary's language

- In the Ignite formatting toolbar, from the dictionary language drop-down list, select a language. (See the following figure.)

  NOTE: Ignite remembers this selection for future chat sessions.

To add words to your personal dictionary

- Right-click an underlined word and select **Add to personal dictionary**.

To clear additions to your personal dictionary

NOTE: This option clears all additions to your personal dictionary.

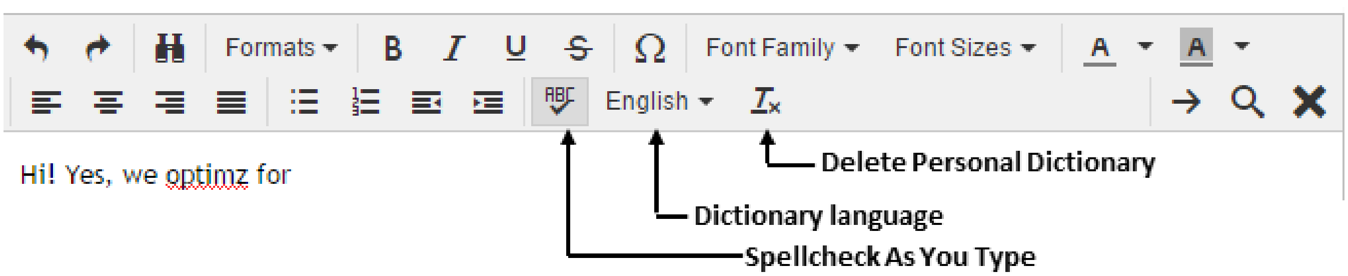
- In the Ignite formatting toolbar, click the **Delete Personal Dictionary** button. (See the following figure.)
- Either refresh the page or log out of Ignite and log back in for the changes to take effect.

To toggle spell checking on or off

- Click the **Spellcheck As You Type button**. (See the following figure.)

  NOTE: Ignite remembers this selection for future chat sessions.

Figure 17: Spell check options in the Input pane



Applying reply templates to chat responses

Agents can apply templates to their chat responses, providing standardized responses to common questions and requests.

To apply a reply template to a chat response

1) When a chat is in reply mode, place the cursor in the body of the chat response.
2) Click the **Reply Template** button.

3) Type the text that the template contains.

   Templates matching the text display.

4) Select a template text from the list provided.

5) Press **Enter**.

   Template mode changes back to Reply mode.

6) Click **Reply** to send the message with the template.

Placing chat sessions on hold and retrieving chat sessions from hold

Agents may have to stop participating in one chat session in order to work on other items. In this case, agents can put the active chat session on hold. Interactions on hold are marked with a 'pause' icon.

Note that administrative configurations may limit how long interactions may be on hold before being requeued and a System Make Busy is registered for the employee. For information on this limit, contact your supervisor or system administrator.

The following procedures explain how to

- Place a chat session on hold
- Retrieve a chat session from hold

To place a chat session on hold (DESKTOP)

- When participating in a chat session, in the **Action** bar, click the **Hold** button.

To place a chat session on hold (WEB)

- Click **Inbox** and select the chat or hover over the item avatar and click **Hold**.

To retrieve a chat session from hold (DESKTOP)

NOTE: You can also retrieve a session from hold by sending a response.

1) Select your **Inbox** and, in the **List** pane, select the chat on hold.

2) In the **Action** bar, click **Remove Hold**.

   The chat session becomes active again.

To retrieve a chat session from hold (WEB)

NOTE: You can also retrieve a session from hold by sending a response.

- Click **Inbox** and select a chat on hold or hover over the item avatar and click **Remove Hold**.

Joining the longest waiting active chat session (DESKTOP)

Agents can switch between active chat sessions according to how long they have been waiting for a response by using the ‘Next Longest’ button in the Action bar. The ‘Next Longest’ button applies to all active interactions in the agent’s Inbox, directing agents to the chat session that has been open and unfinished the longest.

For example, an agent is handling three different chat sessions. Clicking ‘Next Longest’ highlights the active chat session to the chat session that has been waiting the longest for an agent response and switches that interaction back into the Active Contact pane.

When switching between active interactions, the chat session indicates that the agent is joining and leaving the chat session as appropriate.

To reply to the longest waiting chat session

1) In the **Folders** pane, select **Inbox**.
2) In the **List** pane, select an active chat.
   An active chat is one that is no longer ringing and has been joined.
3) In the **Action** bar, click **Next Longest**.
   The system takes you to the next longest waiting active chat session in the Inbox.

Transferring chats

Chat sessions can be transferred to other destinations within a contact center. For example, agents in the Support queue receiving enquiries about a product invoice can transfer these interactions to the Sales queue.

Agents transfer chat sessions to other agents and to queues. To receive transfers, devices must be enabled to handle the interaction's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is unknown cannot receive transferred chats. Agents who are either in Busy/Make Busy or at their chat Workload limit can receive transferred chats.

NOTE: You may only transfer interactions if you have the appropriate permissions.

To transfer a chat (DESKTOP)

1) In the **Folders** pane, click **Inbox**.
2) In the **List** pane, select a chat and, in the **Action** bar, click **Reply**.
3) In the **Action** bar, click **Transfer**.
4) Select an agent or a queue.
   NOTE: You can search for a transfer destination by typing the name of an agent or queue in the Search field.
5) Click **Transfer**.

To transfer a chat (WEB)

1) Click **Inbox** and select a chat or hover over the item avatar and click **Accept**.
   *To transfer directly from the queue, click **Queue**.*
   *To transfer from the **Cases** page, under **Interactions** tab, select the inqueue or inbox chat and click **Goto** icon. The Queues page is displayed. You can now transfer the chat from the **Queues** page.*
2) Select the chat or hover over the item avatar and click **Transfer** icon.

NOTE: Optionally you can select multiple interactions from the **Queues** page and click **Transfer**. The Transfer window is displayed. The list of available Employees and Queues are displayed in the Results section.

3) To transfer to an agent, in the **Transfer** window click **Employees**, select an employee from the list.
4) To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list.
5) To transfer the chat, select the name of the appropriate person or queue.

Leaving chat sessions

When an agent is finished with an interaction, the agent can end the chat session. When an agent leaves a chat session, a message is sent in the chat session stating that the session is complete.

To leave a chat session (DESKTOP AND WEB)

1) When participating in an active chat session, click the **End Your Session** button.

   The End Your Session button displays as an X.

2) When prompted, click **Yes**.

Forwarding chat transcripts

You can forward chat transcripts to multiple parties as an email with additional recipients copied and blind-copied.

Forwards in progress are housed in the agent's personal Drafts folder (DESKTOP), in the Forward subfolder (DESKTOP) or in the Inbox (WEB).

The following procedures explain how to

- Forward a chat transcript
- Discard forwards in progress

To forward a chat transcript (DESKTOP)

1) In the **Folders** pane, select either **History**, **My History**, one of the **Handled** subfolders, or one of the **Failed** folders.
2) In the **List** pane, select a chat transcript and, in the **Action** bar, click **Forward**.
3) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4) Click **Send**. An icon displays over the Preview pane, indicating the transcript is being sent.

   NOTE: If you attempt to forward a transcript and receive a warning that the email address is invalid, the queue that handled the chat may not have been configured for sending transcripts. Contact your supervisor or system administrator.

To forward a chat transcript (WEB)

1) Click **History** and, optionally, select a **Filter:**.
2) Select a chat transcript or hover over the item avatar and click **Forward**.
3) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4) Click **Send**.

To discard a forward in progress (DESKTOP)

NOTE: You can also discard forwards in progress by clicking ‘Discard Draft’ in the Action bar instead of ‘Send’.

1) In the **My Folders** view, expand the **Folders** pane.
2) In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3) Expand the **Drafts** folder and select **Forward**.

4) In the **List** pane, select the transcript and, in the **Action** bar, click **Discard Draft**.

To discard a forward in progress (WEB)

- Click **Inbox** and either select the forward in progress or hover over the item avatar and click **Discard**.

Removing failed chat transcripts from Ignite

Occasionally, chat transcripts may route to 'Failed' in Ignite. You can remove these transcripts from Failed using Ignite's Junk and Forward buttons.

NOTE: Agents may only Junk interactions if they have the appropriate permissions.

To remove a failed chat transcript from Ignite (DESKTOP)

1) In the Folders pane, select a Failed folder.
2) In the **List** pane, select a chat transcript and, in the **Action** bar, click either **Junk** or **Forward**.

To remove a failed chat transcript from Ignite (WEB)

1) Click **History > Failed**.
2) Select a chat transcript or hover over the item avatar and click either **Junk** or **Forward**.
   If you select Forward, the interaction is delivered to the Inbox where you can specify recipients.

Handling Contact Center Messenger in Ignite

Contact Center Messenger simplifies the deployment of chat support in Contact Centers' web sites.

Handling Contact Center Messenger is similar as legacy Chat.

The agent will get similar notification for the incoming chat as in the legacy chat. If the agent accepts the incoming chat, both agent and customer will see a system message that the agent has joined.

NOTE:

- Agents are not allowed to use desktop Ignite if Contact Center Messenger is configured for the chat.
- Administrator must enable contact center messenger for the agent to accept incoming chats.

As with any normal chat, an agent or supervisors can transfer chats from the Web Ignite and from the Interaction Visual Queue.

Logging in to and Logging out from Ignite

- You can log in to **Web Ignite** using either basic authentication or Windows authentication and then use Contact Center Messenger.
- If the log in fails, **Web Ignite** displays an error message and chat presence will be disabled. But agents will still be allowed to use all other media types.
- If agents are configured to use Contact Center Messenger for chat, then the agents will not be able to log in to desktop Ignite. If they try to connect to desktop Ignite, an error message will be displayed recommending them to use Web Ignite.
- If the agent accepts the incoming chat, both agent and customer will see a system message that the agent has joined.

Logging out of Contact Center Messenger is same as legacy Chat.

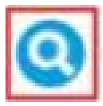
Reply Templates

Agent can create, edit, delete personal chat reply templates using a Reply Template editor.

NOTE: Reply template editor is visible only if Contact Center Messenger is enabled.

1) To create new templates, go to **Tools** > **Chat Personal reply template editor**.
2) Enter the reply content in the text box and click **Save**.
3) If you want to use an existing template to create a new template, then click **Insert reply template**.
4) Choose the existing template that you would like to use, the content will appear in the editor, you can make the required changes and click **Save**.
5) To edit or delete an existing template, click **Browse** and choose the template you want to edit or delete from the list of templates.

Searching Reply Templates

You can accept a chat and click  icon to insert a reply template to the chat window.

- You can toggle **Use reply template** button to use the last reply template to the new chat; otherwise the agent can select a template form the Reply Templates list.
- The Chat reply template is inserted into the chat dialogue line. Agents can preview the message before sending the conversation.

Ending a Chat

For Contact Center Messenger Chats, an End Session icon is added to the left of the Hold button.

The Chat UI component is replaced with the entire chat transcript during worktimer or after you end or transfer a chat.

Handling open media interactions

Open media interactions are automatically sent to your Inbox if you are the longest idle agent or the agent with the highest skill level in your agent group, if your agent group uses skill levels. Agents can also pick open media interactions out of queue.

When an open media item is routed to the desktop and accepted by an agent, depending on the settings for the variables used for the API request (TargetUri and TargetUriEmbedded), one of the following occurs:

- A URL launches as an external tab
- An HTTP interface is embedded into Ignite

The following explains how to

- Preview open media interactions
- Pick open media interactions out of queue
- Reply to open media interactions
- Transfer open media interactions

- Decline open media interactions
- Mark open media interactions as No Reply and Junk
- Place open media interactions on hold and retrieve open media interactions from hold

Previewing open media contacts

If administrative configurations permit, agents can preview interactions before picking them out of queue or handling them. The information available when previewing items in the queue depends on the Preview Url settings used for the API request.

The following explains how to

- Preview open media interactions in queue
- Preview open media interactions in the Inbox

To preview an open media interaction in queue

1) Click **Queues** and select a queue.
2) Select an open media interaction to preview.

To preview an open media interaction in the Inbox

- Click **Inbox** and select an open media interaction to preview.

Picking open media contacts out of queue

Pick behavior occurs in the following ways: First, agents can pick interactions out of queue and send them to the Inbox. Once ringing in the Inbox, the interaction can be accepted. Second, agents can choose to pick and reply to an interaction in one motion. Choosing to pick and reply sends the interaction to the agent's Inbox and immediately opens the interaction in reply mode.

For more information on ringing behavior, see *"Ringing states in Ignite"*.

NOTE:

- Agents cannot pick or pick and reply to interactions from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to interactions from the queue if they have the appropriate permissions.

The following procedures explain how to

- Pick an open media interaction out of queue and handle the open media interaction
- Pick and automatically reply to an open media interaction

To pick an open media interaction out of queue and handle the open media interaction

1) Click **Queues** and select the appropriate queue.
2) Select an interaction or hover over the item avatar and click **Pick**.

   The open media interaction is transferred to your Inbox.
3) To handle the open media interaction, click **Inbox** and select the open media interaction or hover over the item avatar.

To pick and automatically reply to an open media interaction

1) Click **Queues** and select the appropriate queue.
2) Select an interaction or hover over the item avatar and click **Pick and Reply**.
   The interaction is transferred to your Inbox and opens in reply mode.

Replying to open media contacts

Once an open media interaction is in the Inbox, agents can reply to or otherwise handle it.

To reply to an open media interaction

- Click **Inbox** and select an open media interaction or hover over the item avatar and click **Accept**.

Transferring open media contacts

Open media interactions can be transferred to queues or other agents within a contact center.

To receive transfers, devices must be enabled to handle the interaction's media type. Agents who are logged out, in DND, Offline (WEB), or whose presence is unknown cannot receive transferred open media interactions. Agents who are either in Busy/Make Busy or at their open media Workload limit can receive transferred open media interactions.

NOTE: You may only transfer interactions if you have the appropriate permissions.

To transfer an open media interaction

1) Click **Inbox** and select an open media interaction or hover over the item avatar and click **Accept**.
   *To transfer directly from the queue, click **Queues**,*
   *To transfer from the **Cases** page, under **Interactions** tab, select the inqueue chat and click **Goto** icon. The Queues page is displayed. You can now transfer the chat from the **Queues** page.*
2) Select the open media interaction or hover over the item avatar and click **Transfer** icon.

NOTE: Optionally you can select multiple interactions from the **Inbox** or the **Queues** page and click **Transfer**. The Transfer window is displayed. The list of available Employees and Queues are displayed in the Results section.

3) To transfer to an agent, in the **Transfer** window click **Employees**, select an employee from the list and proceed to step 5.
4) To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list.
   *To search queues, type the name of the queue in the **Search** field.*
5) To transfer the open media interaction, select the name of the appropriate person or queue.

Declining open media contacts

Agents can decline offered open media interactions, sending the interaction back to the queue as the longest waiting.

NOTE: When an agent declines an interaction, they are automatically put into Busy/Make Busy across all media capabilities. A System Make Busy and a requeue count is registered for the employee. For more information, see *"Setting and removing Busy/Make Busy in Ignite"*.

To decline an open media interaction

- Click **Inbox** and select an open media interaction or hover over the item avatar and click **Decline**.

Marking open media contacts as No Reply and Junk

Occasionally, open media interactions requiring no reply reach queues and agents' Inboxes. Agents can mark these open media interactions either as requiring no reply or as junk.

Agents can also junk open media interactions directly from 'Failed', rather than attempting to reroute them.

Marking interactions as No Reply and Junk removes the interactions from Ignite. If the item is in queue or the Inbox, responses in progress are deleted.

NOTE:

- Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- Agents may only Junk interactions if they have the appropriate permissions.

To mark an open media interaction as No Reply or Junk from the Inbox

- Click **Inbox** and select an open media interaction or hover over the item avatar and click either **No Reply** or **Junk**.

To mark an open media interaction as No Reply or Junk from the queue

1) Click **Queues** and select an open media queue.
2) Select an open media interaction and click either **No Reply** or **Junk**.

Placing open media contacts on hold and retrieving open media contacts from hold

Agents may have to stop working on one open media interaction in order to work on other items. In these cases, agents can put the active open media item on hold. Interactions on hold are marked with a 'pause' icon.

Note that administrative configurations may limit how long interactions may be on hold before being requeued and a System Make Busy is registered for the employee. For information on this limit, contact your supervisor or system administrator.

The following procedures explain how to

- Place an open media interaction on hold
- Retrieve an open media interaction from hold

To place an open media interaction on hold

- Click **Inbox** and select an open media interaction, or hover over the item avatar, and click **Hold**.

To retrieve an open media interaction from hold

- Click **Inbox** and select an open media interaction on hold or hover over the item avatar and click **Remove Hold**.

Accessing real-time information with Ignite (WEB)

Ignite (WEB) enables real-time monitoring of employees, agents, queues, and callback requests. The Ignite (WEB) real-time monitors do not duplicate those available in Contact Center Client but, instead, offer a succinct set of the most essential statistics in the highly accessible online format of Ignite (WEB).

The following real-time monitors are available in Ignite (WEB):

- Employee State
- Agent State
- Queue Now
- Callback Requests

To access the real-time monitors in Ignite (WEB)

1) In Ignite (WEB), click **Dashboards**.
2) Click the down arrow and select the dashboard from the list that contains the monitor you want to display.

NOTE:

- Alarms are not supported for real-time monitors in Ignite (WEB).
- Access to real-time monitors is determined by administrator-set security roles.

To learn how to add and configure settings for real-time monitors in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Monitoring employee state in Ignite (WEB)

The Employee State monitor available in Ignite (WEB) enables you to view activity and, if enabled for Interactive Contact Center, adjust presence for individual employees in your contact center.

You can view the following real-time employee information:

- Employee name, reporting number, and avatar
- ACD availability and state (with colored state icon)
- Busy duration for the day
- Do Not Disturb duration for the day
- Number of interactions handled for the day (voice, email, chat, SMS, open media as applicable)
- Date/Time of first login
- Total shift duration

NOTE: Only one employee at a time can display in the Employee State monitor but you canoptionally add several employee monitors to a dashboard to access information for multiple employees.

The Employee State monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard, To learn how to add and configure settings for the Employee State monitor in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Monitoring agent state in Ignite (WEB)

The Agent State monitor available in Ignite (WEB) enables you to view the real-time state of agents in your contact center and, if enabled for Interactive Contact Center, adjust agent presence.

Each column lists agents in order of time in state, with the longest in state at the top. For example, the agent at the top of the Idle column is the next longest idle agent and should receive the next inbound interaction.

The following table lists and describes real-time agent state information that displays in the Agent State monitor in Ignite (WEB).

Table 6: Agent State monitor statistics - Ignite (WEB)

STATISTIC	DESCRIPTION
ACD	includes agents in ACD and ACD Hold
Idle	includes agents who are available for ACD but currently not handling any interactions
Non ACD	includes agents in Non ACD, Non ACD Hold, Outbound, and Outbound Hold
Unavailable	includes agents in Do Not Disturb, Busy, Work Timer, and Reseize Timer
Not Present	includes agents who are logged in as an agent but not present in any agent groups
Offline	includes agents who are logged in as an ACD agent

The Agent State monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard, To learn how to add and configure settings for the Agent State monitor in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Monitoring queues in Ignite (WEB)

The Queue Now monitor available in Ignite (WEB) enables supervisors to view queue or queue group statistics and a summary of current agent states for each queue or queue group in real time.

Queue statistics include Offered, Service Level %, Interactions Waiting, Requeued, and Longest Waiting. Handled, Interflowed, and Abandoned counts can also be accessed by hovering over ‘Offered’ for each queue or queue group.

The following table lists and describes queue statistics that display in the Queue Now monitor in Ignite (WEB).

Table 7: Queue Now monitor statistics - Ignite (WEB) (Sheet 1 of 2)

STATISTIC	DESCRIPTION
Offered	the total number of interactions offered to the queue or queue group
Service Level %	for a queue, this is the percentage of interactions handled within the queue’s Service Level Time value over the day for a queue group, this is the lowest percentage of interactions handled within the queue’s Service Level Time value over the day across all queues
Contacts Waiting	the current number of interactions in queue waiting for a member to become available, including those listening to silence, music, or recorded announcements
Requeued	the total number of ACD interactions requeued **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'
Longest Waiting	the current duration, in minutes and seconds, of the interaction waiting the longest in queue or queue group
Handled	the total number of ACD interactions handled by members
Interflowed	the total number of ACD interactions interflowed interflow is a mechanism that directs an interaction waiting in queue to another answer point **NOTE:** If an interaction waiting in queue is redirected before the queue's short abandoned time has elapsed, the queue is pegged with a Queue Unavailable count rather than an interflowed count. In order for the Interflowed peg to occur, the redirection must occur after the short abandoned time has elapsed

Table 7: Queue Now monitor statistics - Ignite (WEB) (Continued) (Sheet 2 of 2)

STATISTIC	DESCRIPTION
Abandoned	the total number of interactions abandoned before being answered by members **NOTE:** Abandoned does not peg short abandons as abandoned interactions in the Queue Now monitor. The Abandoned column in the Interactive Visual Queue monitor displays all abandoned interactions. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors

The current number of agents, by state, also displays for each queue or queue group for the following agent states:

- **Idle**: includes agents who are available for ACD but not currently handling any interactions
- **ACD**: includes agents in ACD and ACD Hold
- **Non-ACD**: includes agents in Non ACD, Non ACD Hold, Outbound, and Outbound Hold
- **Unavailable**: includes agents in Do Not Disturb, Busy, and Work Timer

The Queue Now monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard, To learn how to add and configure settings for the Queue Now monitor in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Viewing and managing callbacks in Ignite (WEB)

When licensed for IVR, the Callback Requests monitor, available in Ignite (WEB), enables you to interact with callbacks and monitor their state in real time.

The Callback Requests monitor enables users to requeue, reject, and delete callbacks from within the monitor. Requeued callbacks are re-entered into their queue. Rejected callbacks are removed from the queue and will not be offered to employees. Deleted callbacks are removed from the monitor, but are not removed from the system.

To requeue, reject, or delete a callback

- In the row of the call you want to interact with, in the **Actions** column, left-click either **Requeue**, **Reject**, or **Delete**.

The following table lists and describes the statistics available in the Callback Requests monitor.

Table 8: Callback Requests monitor statistics - Ignite (WEB) (Sheet 1 of 2)

STATISTIC	DESCRIPTION
Name	the name of the caller
Number	the phone number provided by the caller

Table 8: Callback Requests monitor statistics - Ignite (WEB) (Continued) (Sheet 2 of 2)

STATISTIC	DESCRIPTION
Status	the status of the callback
Offer At	the specific time the callback will be executed
Received	the specific time the caller submitted the callback request
Preferred Time	the time the caller is available to receive the callback (if the caller does not enter a preferred time, this column will be blank)
Destination	the queue, agent, and extension for which the callback is intended
# of Attempts	the number of times the callback has been attempted
Last Attempted	the specific time the last callback attempt to the caller was made
Actions	within this column, you can choose to requeue, reject, or delete a callback

The Callback Requests monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard, To learn how to add and configure settings for the Callback Requests monitor in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Employee and Agent control

Using Interactive Contact Center and Contact Center Client, you can control agents on the following monitors:

- Agent State by Position and Employee State by Position
- Agent State by Time and Employee State by Time
- Agent Shift

Agent control gives you control over individual agents. Monitor control gives you control over all of the agents on a monitor. All of the agents on the monitor are affected simultaneously by the action you take.

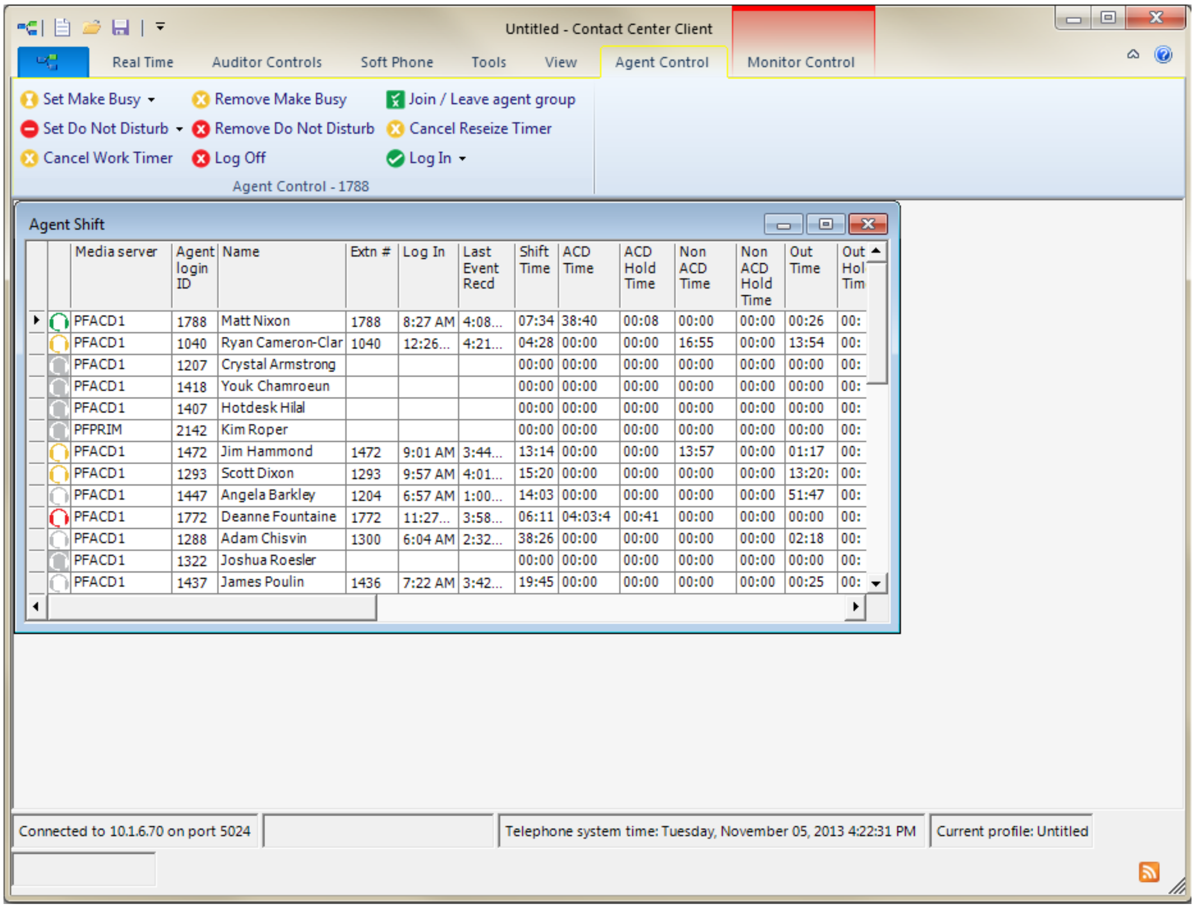
If you have Context Sensitivity enabled for monitors, the Agent Control and Monitor Control tabs display in the Contact Center Client ribbon when you have any of the above monitors open. You can perform actions using either a right-click and select method within the monitor or by selecting an agent or an empty cell (monitor control) and accessing the action menu in the Agent or Monitor Control tab views. (See the following figure.)

Using Interactive Contact Center and Ignite (WEB), you can control agents and employees in the following monitors:

- Employee State
- Agent State

NOTE: Context sensitivity and monitor control are not supported with Ignite (WEB). You can only alter the state for one employee or agent at a time.

Figure 18: Agent Shift - Agent Control tab options



Interactive Contact Center

Interactive Contact Center is a feature that enables supervisors to control the availability of agents, extensions, and queues, and enables agents to control their own availability.

Access to Interactive Contact Center abilities is determined by security role settings. Employees must be associated with the 'May control my real-time status in Interactive Contact Center' security role setting in order to change their state using applicable MiContact Center Business client applications.

Supervisors and Interactive Contact Center

Using Interactive Contact Center, supervisors can

- Control the availability of agents and ACD queues
- Log agents on and off of the system

- Have agents leave their agent groups and join other agent groups. Agent groups are assigned to queues so, in this way, agents can be moved from one queue to another as needed
- Have extensions leave their Ring Groups and join other Ring Groups
- Place agents in Make Busy
- Place agents in Do Not Disturb
- Place extensions into Do Not Disturb
- Place queues in Do Not Disturb
- Cancel Work Timer
- Cancel Reseize Timer

An employee's agent can be assigned to multiple agent groups, which can be associated to multiple queues. In order to move the agent from one queue to another queue, the supervisor has the agent leave one agent group and join another agent group.

Agents and Interactive Contact Center

Using Interactive Contact Center, agents can

- Log themselves on and off of the system
- Remove themselves from agent groups and place themselves into other agent groups. Agent groups are assigned to queues so, in this way, agents can move themselves from one queue to another as needed
- Place themselves in Make Busy
- Place themselves in Do Not Disturb

Every time agents leave their desks they must set themselves into either Make Busy or Do Not Disturb and apply the applicable reason code. This enables supervisors to track agents' Do Not Disturb and Make Busy activity in reports.

Logging on an agent - Ignite (WEB)

When you log on an agent in Ignite (WEB), you make them available to receive voice interactions.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To log on a voice agent

1) In the monitor, select the agent you want to log on.
2) Click **State > Available**.
3) Enter the agent’s extension and PIN (if enabled) and click **Login**.

   NOTE: This step is not required if the agent is set to automatically log in when the ‘Available’ state is selected.

Logging off an agent - Ignite (WEB)

When you log off an agent in Ignite (WEB), you make them unavailable to receive all media interactions, including voice, email, chat, SMS, and open media.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To log off an agent

1) In the monitor, select the agent you want to log off.
2) Click **State > Offline**.

Joining and leaving agent groups - Ignite (WEB)

After signing into Ignite (WEB) and logging into their phone, agents can use interactive Contact Center to control their presence in agent groups. Optionally, supervisors can use Interactive Contact Center to control the presence status of agents in specific agent groups from within the Agent and Employee State monitors in Ignite (WEB).

The following procedures take place in either an Agent State or Employee State monitor in Ignite (WEB).

To join an agent to an agent group

1) In the monitor, select the agent for which you want to modify agent group presence.
2) Click **Agent Groups**.
3) Hover over the agent group's avatar and select **Join All**.
4) Click **Update**.

To remove an agent from an agent group

1) In the monitor, select the agent for which you want to modify agent group presence.
2) Click **Agent Groups**.
3) Hover over the agent group's avatar and select **Leave All**.
4) Click **Update**.

To join an agent to or remove an agent from all agent groups

1) In the monitor, select the agent for which you want to modify agent group presence.
2) Click **Agent Groups**.
3) To join an agent to all agent groups, click **Join All > Update**.
4) To remove an agent from all agent groups, click **Leave All > Update**.

To make an agent available or unavailable to answer interactions of a specific media type

1) In the monitor, select the agent for which you want to modify agent group presence.
2) Click **Agent Groups**.
3) To become available to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in blue.
4) To become unavailable to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in grey.
5) Click **Update**.

Placing employees in Busy - Ignite (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the

Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing an employee into Busy places them in Busy across all media types for which they answer interactions. While in Busy, they can receive transferred multimedia interactions, however, inbound multimedia interactions will not be routed to them. They can also receive Non ACD voice interactions and pick interactions waiting in queue.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To place an employee in Busy

1) In the monitor, select the employee you want to place in Busy.
2) Click **State > Busy…**.
3) Choose a Busy code.

Removing employees from Busy - Ignite (WEB)

Removing employees from Busy re-enables them to answer inbound multimedia interactions and ACD calls.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Busy

1) In the monitor, select the employee you want to remove from Busy.
2) Under **State**, select an alternate state, or, click **X** button next to **Busy...** to remove the busy code.

   NOTE: Select **Available** if you want to make them available to receive interactions.

Placing employees in Do Not Disturb - Ignite (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing an employee into Do Not Disturb places them in Do Not Disturb across all media types for which they answer interactions. While in Do Not Disturb, they are unable to receive inbound multimedia interactions and internal voice interactions, including transfers.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To place an employee in Do Not Disturb

1) In the monitor, select the employee you want to place in Do Not Disturb.
2) Under **State**, click **Do Not Disturb….**
3) Choose a DND code.

Removing employees from Do Not Disturb - Ignite (WEB)

Removing employees from Do Not Disturb re-enables them to receive interactions for all applicable media types.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Do Not Disturb

1) In the monitor, select the employee you want to remove from Do Not Disturb.
2) Under **State**, select an alternate state, or, click **X** button next to **Do Not Disturb...** to remove the DND Reason code.

   NOTE: Select **Available** if you want to make them available to receive interactions.

Accessing real-time information with Ignite (WEB)

Ignite (WEB) enables real-time monitoring of employees, agents, queues, and callback requests. The Ignite (WEB) real-time monitors do not duplicate those available in Contact Center Client but, instead, offer a succinct set of the most essential statistics in the highly accessible online format of Ignite (WEB).

The following real-time monitors are available in Ignite (WEB):

- Employee State
- Agent State
- Queue Now
- Callback Requests

To access the real-time monitors in Ignite (WEB)

1) In Ignite (WEB), click **Dashboards**.
2) Click the down arrow and select the dashboard from the list that contains the monitor you want to display.

NOTE:

- Alarms are not supported for real-time monitors in Ignite (WEB).
- Access to real-time monitors is determined by administrator-set security roles.

To learn how to add and configure settings for real-time monitors in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Monitoring employee state in Ignite (WEB)

The Employee State monitor available in Ignite (WEB) enables you to view activity and, if enabled for Interactive Contact Center, adjust presence for individual employees in your contact center.

You can view the following real-time employee information:

- Employee name, reporting number, and avatar
- ACD availability and state (with colored state icon)
- Busy duration for the day
- Do Not Disturb duration for the day
- Number of interactions handled for the day (voice, email, chat, SMS, open media as applicable)
- Date/Time of first login
- Total shift duration

NOTE: Only one employee at a time can display in the Employee State monitor but you canoptionally add several employee monitors to a dashboard to access information for multiple employees.

The Employee State monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard, To learn how to add and configure settings for the Employee State monitor in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Monitoring agent state in Ignite (WEB)

The Agent State monitor available in Ignite (WEB) enables you to view the real-time state of agents in your contact center and, if enabled for Interactive Contact Center, adjust agent presence.

Each column lists agents in order of time in state, with the longest in state at the top. For example, the agent at the top of the Idle column is the next longest idle agent and should receive the next inbound interaction.

The following table lists and describes real-time agent state information that displays in the Agent State monitor in Ignite (WEB).

Table 9: Agent State monitor statistics - Ignite (WEB)

STATISTIC	DESCRIPTION
ACD	includes agents in ACD and ACD Hold
Idle	includes agents who are available for ACD but currently not handling any interactions
Non ACD	includes agents in Non ACD, Non ACD Hold, Outbound, and Outbound Hold
Unavailable	includes agents in Do Not Disturb, Busy, Work Timer, and Reseize Timer
Not Present	includes agents who are logged in as an agent but not present in any agent groups
Offline	includes agents who are logged in as an ACD agent

The Agent State monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard, To learn how to add and configure settings for the Agent State monitor in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Monitoring queues in Ignite (WEB)

The Queue Now monitor available in Ignite (WEB) enables supervisors to view queue or queue group statistics and a summary of current agent states for each queue or queue group in real time.

Queue statistics include Offered, Service Level %, Interactions Waiting, Requeued, and Longest Waiting. Handled, Interflowed, and Abandoned counts can also be accessed by hovering over ‘Offered’ for each queue or queue group.

The following table lists and describes queue statistics that display in the Queue Now monitor in Ignite (WEB).

Table 10: Queue Now monitor statistics - Ignite (WEB) (Sheet 1 of 2)

STATISTIC	DESCRIPTION
Offered	the total number of interactions offered to the queue or queue group
Service Level %	for a queue, this is the percentage of interactions handled within the queue’s Service Level Time value over the day for a queue group, this is the lowest percentage of interactions handled within the queue’s Service Level Time value over the day across all queues
Contacts Waiting	the current number of interactions in queue waiting for a member to become available, including those listening to silence, music, or recorded announcements
Requeued	the total number of ACD interactions requeued **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'
Longest Waiting	the current duration, in minutes and seconds, of the interaction waiting the longest in queue or queue group
Handled	the total number of ACD interactions handled by members
Interflowed	the total number of ACD interactions interflowed interflow is a mechanism that directs an interaction waiting in queue to another answer point **NOTE:** If an interaction waiting in queue is redirected before the queue's short abandoned time has elapsed, the queue is pegged with a Queue Unavailable count rather than an interflowed count. In order for the Interflowed peg to occur, the redirection must occur after the short abandoned time has elapsed

Table 10: Queue Now monitor statistics - Ignite (WEB) (Continued) (Sheet 2 of 2)

STATISTIC	DESCRIPTION
Abandoned	the total number of interactions abandoned before being answered by members **NOTE:** Abandoned does not peg short abandons as abandoned interactions in the Queue Now monitor. The Abandoned column in the Interactive Visual Queue monitor displays all abandoned interactions. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors

The current number of agents, by state, also displays for each queue or queue group for the following agent states:

- **Idle**: includes agents who are available for ACD but not currently handling any interactions
- **ACD**: includes agents in ACD and ACD Hold
- **Non-ACD**: includes agents in Non ACD, Non ACD Hold, Outbound, and Outbound Hold
- **Unavailable**: includes agents in Do Not Disturb, Busy, and Work Timer

The Queue Now monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard, To learn how to add and configure settings for the Queue Now monitor in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Viewing and managing callbacks in Ignite (WEB)

When licensed for IVR, the Callback Requests monitor, available in Ignite (WEB), enables you to interact with callbacks and monitor their state in real time.

The Callback Requests monitor enables users to requeue, reject, and delete callbacks from within the monitor. Requeued callbacks are re-entered into their queue. Rejected callbacks are removed from the queue and will not be offered to employees. Deleted callbacks are removed from the monitor, but are not removed from the system.

To requeue, reject, or delete a callback

- In the row of the call you want to interact with, in the **Actions** column, left-click either **Requeue**, **Reject**, or **Delete**.

The following table lists and describes the statistics available in the Callback Requests monitor.

Table 11: Callback Requests monitor statistics - Ignite (WEB) (Sheet 1 of 2)

STATISTIC	DESCRIPTION
Name	the name of the caller
Number	the phone number provided by the caller

Table 11: Callback Requests monitor statistics - Ignite (WEB) (Continued) (Sheet 2 of 2)

STATISTIC	DESCRIPTION
Status	the status of the callback
Offer At	At the specific time the callback will be executed
Received	the specific time the caller submitted the callback request
Preferred Time	the time the caller is available to receive the callback (if the caller does not enter a preferred time, this column will be blank)
Destination	the queue, agent, and extension for which the callback is intended
# of Attempts	the number of times the callback has been attempted
Last Attempted	the specific time the last callback attempt to the caller was made
Actions	within this column, you can choose to requeue, reject, or delete a callback

The Callback Requests monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard, To learn how to add and configure settings for the Callback Requests monitor in Ignite (WEB), see *"Configuring Ignite (WEB) dashboards"*.

Work Timer

NOTE:

- When agents are in Work Timer, Interactions remain in the Inbox until Work Timer is removed .
- Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

DESKTOP - Interactions in Work Timer are marked with yellow.

WEB - Interactions in Work Timer are marked with yellow and a clock icon.

If administrative configurations permit, agents are placed in a Work Timer state after completing an interaction. During Work Timer agents can complete after-contact work, such as speaking with a supervisor, without having this downtime affect their performance statistics.

Work Timer counts against an agent’s Workload, and can determine whether agents are pushed interactions. If agents are in a Work Timer state for the maximum number of interactions they can handle for a media type, they are not offered another interaction of that media type until Work Timer expires or is removed. For example, an agent permitted to handle two emails at a time is in Work Timer for both. Until one Work Timer state expires or is removed, the agent is not offered another inbound email. However, this agent will be pushed chat interactions, unless they are also in Work Timer for the maximum number of chat interactions their Workload permits them to receive.

Ignite displays Workload statistics, including the number of Work Timer states the agent is in for each media type. See *"The Status bar (DESKTOP)"* for more information. See *"Viewing agent handling statistics (WEB)"*. For more information on Workload, see *"Handling multimedia contacts in Ignite"*.

The duration of Work Timer is configured on a queue-by-queue basis. To determine this duration, contact your supervisor or system administrator.

When Work Timer is the overriding state, agents can remove Work Timer and put themselves back into an overriding state across all media capabilities. Once agents have removed Work Timer, they cannot put themselves back into this state.

The following procedures explain how to remove Work Timer.

To remove Work Timer (DESKTOP)

- In the **Sidebar**, click the **Remove Work Timer** button.

  NOTE: Alternatively, remove Work Timer via the Action bar.

To remove Work Timer (WEB)

- Click **Clear Work Timer**.

  *Alternatively, click your avatar, select **State**, and choose an alternate state.*

Canceling Work Timer for employees - Ignite (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Work Timer

1) In the monitor, select the employee you want to remove from Work Timer.
2) Click **State** and select an alternate state.

   NOTE: Select **Available** if you want to make them available to receive interactions.

Managing agent group presence and agent states

Agent group presence refers to whether an ACD agent is present in or absent from an agent group.

Agents present in an agent group can receive interactions in the Inbox, pick interactions out of queue, and be sent interactions from a supervisor. Agents absent from an agent group cannot handle interactions for the queue.

Agent states refers to an agent's availability to receive ACD interactions. Examples of agent states include Available, Busy/Make Busy and Do Not Disturb. An agent's state determines Ignite handling options available to them.

WEB - An agent in the Offline state is logged into Ignite but their ACD agents are not logged into the system. In this state interactions cannot be handled for the queue.

NOTE: When you configure Agent Group Presence for agents who use an ACD softphone, you must set the default presence to **Absent**. If the presence is set to **Present**, agents will receive ACD calls when they log in to MiCollab, without logging in to Ignite.

Viewing Agent Group Presence in Ignite

Agents can view the agent groups of which they are members. Viewing Agent Group Presence helps agents verify that they are able to handle interactions for the appropriate queues.

Agents can view Agent Group Presence on a group-by-group basis across media types. If administrative configurations permit, agents may also make themselves present in and absent from agent groups and the media types that the group handles.

To view Agent Group Presence (DESKTOP)

- In the **Sidebar**, click the **Agent Group Presence** button.

  Check marks display beside agent groups to which the agent is present. Media types that an agent is present in handle display a blue background. Media types that an agent is not present in handle display a white background.

To view Agent Group Presence (WEB)

- Click your avatar and select **Agent Groups**.

  Media types that an agent is present in handle display in blue. Media types that an agent is not present in handle display in grey.

Setting and removing Busy/Make Busy in Ignite

When agents must become temporarily unavailable for inbound multimedia interactions, they can put themselves into Busy/Make Busy and choose a code indicating why they are unavailable.

Setting Busy/Make Busy for one agent capability applies a Busy/Make Busy status status to all of the employee's agents. Inbound multimedia interactions are not routed to the agent; however, agents in Busy/Make Busy can receive transferred interactions. While in Busy/Make Busy, voice agents are able to receive Non ACD voice interactions without being removed from Busy/Make Busy and can pick interactions waiting in queue.

Entering Busy/Make Busy while handling interactions ensures that agents are not offered more once finished. However, existing voice, email, chat, SMS, and open media interactions continue until one of the parties ends the interaction.

Agents also enter Reseize Timer when they decline an interaction, fail to answer a ringing interaction within the allotted time, and place an item on hold for longer than is permitted. In each instance, the agent is automatically put into Busy/Make Busy across all media capabilities, and a System Make Busy is registered for the employee. For information on the time allotted to answer a ringing interaction and the duration for which interactions can be on hold, contact your supervisor or system administrator.

The following procedures explain how to

- Set Busy/Make Busy and change Busy/Make Busy codes

- Remove Busy/Make Busy

  NOTE: Agents must remove Busy/Make Busy to become available to receive inbound multimedia interactions and internal voice interactions.
- Change to a Do Not Disturb (DND) state while in Busy/Make Busy

To set Make Busy and change Make Busy codes (DESKTOP)

1) In the **Sidebar**, click the **Make Busy** button.
2) Select a MKB code and click **Apply**.

   NOTE: Agents cannot program MKB codes and can only select from the list provided.
3) To change a Make Busy code assigned to you, follow the above steps.

To set Busy and change Busy codes (WEB)

1) Click your avatar.
2) Under **State**, click **Busy**.
3) Choose a Busy code.

To remove Make Busy (DESKTOP)

- In the **Status** bar, click the **X** button.

To remove Busy (WEB)

1) Click your avatar.
2) Under **State**, click the **X** button next to **Busy**.

To change to a Do Not Disturb state while in Make Busy (DESKTOP)

NOTE: Do Not Disturb and Busy/Make Busy states layer. If an agent in Busy/Make Busy changes their state to Do Not Disturb, the agent will remain in Busy/Make Busy once Do Not Disturb is removed. This prevents agents from receiving interactions when switching states between Busy/Make Busy and Do Not Disturb.

1) In the **Sidebar**, click the **Do Not Disturb** button.
2) Select a DND code and click **Apply**.

NOTE: To remove DND and revert to Make Busy, click your avatar, click the **X** button next to **Do Not Disturb**

To change to a Do Not Disturb state while in Make Busy (WEB)

NOTE: Do Not Disturb and Busy/Make Busy states layer. If an agent in Busy/Make Busy changes their state to Do Not Disturb, the agent will remain in Busy/Make Busy once Do Not Disturb is removed. This prevents agents from receiving contacts when switching states between Busy/Make Busy and Do Not Disturb.

1) Click your avatar.
2) Under **State**, click **Do Not Disturb**.
3) Select a Do Not Disturb reason code.
4) To remove DND and revert to Make Busy, click your agent name and click **X** button next to **Do not Disturb**.

Setting and removing Do Not Disturb in Ignite

When agents must become temporarily unavailable for receiving inbound multimedia interactions and internal voice interactions, including transfers, they can put themselves into Do Not Disturb (DND) and choose a code indicating why they are unavailable.

Agents in DND can receive external voice interactions, and existing chat and inbound/internal voice interactions continue until one of the parties ends the interaction.

Setting DND for one agent capability applies a DND status to all of the employee's agents.

The following procedures explain how to

- Set DND and change DND codes
- Remove DND

  NOTE: Agents must remove DND to become available to receive inbound multimedia interactions or internal voice interactions
- Change to a Busy/Make Busy (MKB) state while in DND

To set DND and change DND codes (DESKTOP)

1) In the **Sidebar**, click the **Do Not Disturb** button.
2) Select a DND code and click **Apply**.

   NOTE: Agents cannot program DND codes and can only select from the list provided.
3) To change a DND code, follow the above steps.

To set DND and change DND codes (WEB).

1) Click your avatar.
2) Under **State**, click **Do Not Disturb …**.
3) Choose a DND code.

To remove DND (DESKTOP)

- In the **Status bar**, click the **X** button.

To remove DND (WEB)

1) Click your avatar.
2) Under **State** , click the **X** button next to **Do Not Disturb …**.

To change to a MKB state while in DND (DESKTOP)

NOTE: If an agent changes their DND state to MKB, the agent remains in DND until this state is removed.

1) In the **Sidebar**, click the **Make Busy** button.
2) Select a Make Busy code and click **Apply**.
3) In the **Status** bar, click the X button to remove yourself from DND and enter MKB.

To change to a Busy state while in DND (WEB)

NOTE: If an employee applies a MKB state while in DND, the employee remains in DND until the DND state is removed.

1) Click your avatar.
2) Under **State** choose **Busy...**.
3) Choose a Busy code.
4) Click your avatar.
5) Under **State**, click the **X** button next to **Do Not Disturb**.

Interacting with customer interactions to improve service levels

Interactive Visual Queue is a Contact Center Client real-time monitor that works in conjunction with YourSite Explorer and Interactive Contact Center to enable supervisors to both monitor and control the content in contact center queues. With Interactive Visual Queue monitors open, supervisors can monitor the contents of queues and queue groups, easily move interactions between queues, assign interactions to agents, and proactively remove unwanted interactions from the queues.

Interactive Visual Queue is comprised of a Queued media grid and, for voice media, an Abandoned media grid and a Callback to be processed grid. The Interactive Visual Queue Queued media grid displays all types of media interactions that are currently queued. It does not display items that have already been offered to agents or are currently being handled by agents.

Using a drag-and-drop operation, supervisors can balance traffic by moving interactions from busy queues to less active queues and ensure optimum customer service by directing high priority interactions to experienced agents. Supervisors can pick interactions from the queue and handle them, and can tag email interactions as junk or no reply needed to remove them from the queue. Supervisors can also preview email interactions.

For information on using Interactive Visual Queue with voice media, see *"Interactive Visual Queue"*.

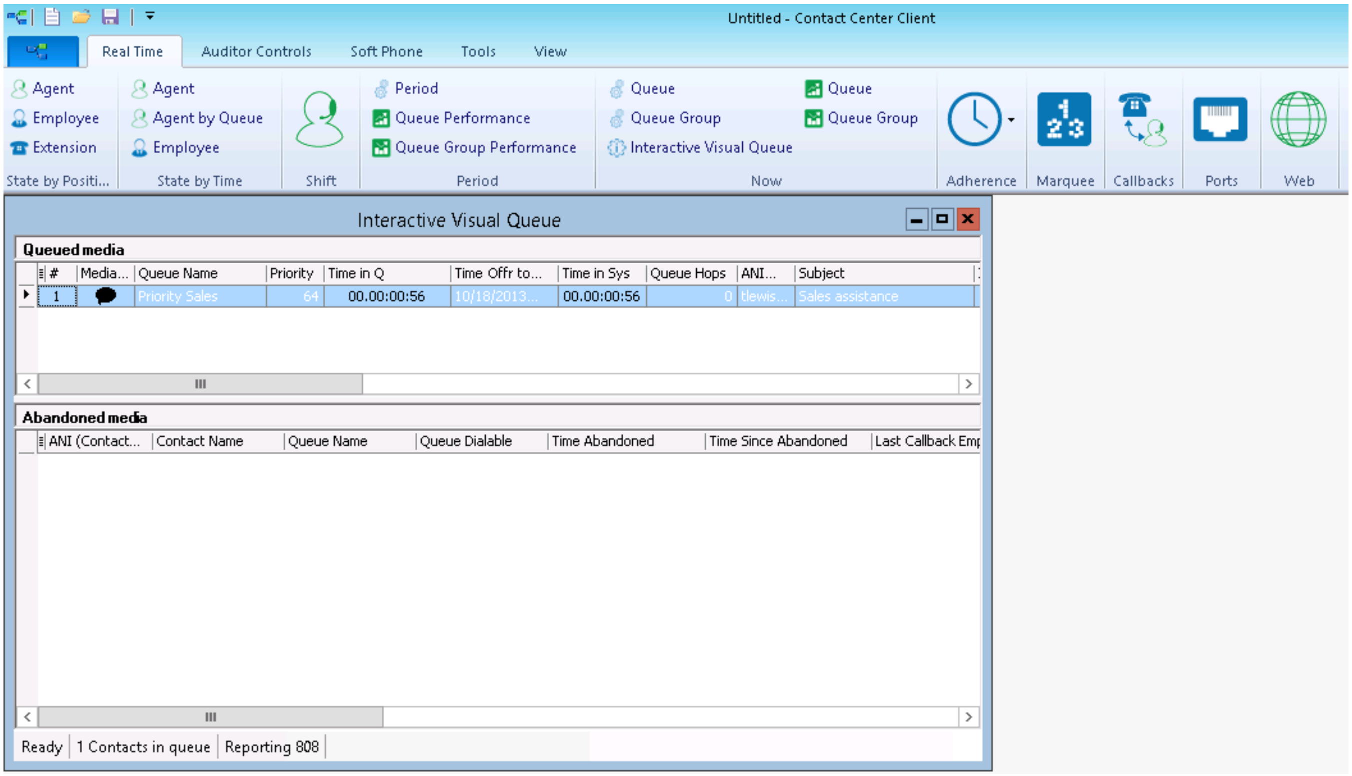
Opening Interactive Visual Queue

You access Interactive Visual Queue by logging on to Contact Center Client and then opening the Real-time toolbar.

To open an Interactive Visual Queue monitor

1) Log on to Contact Center Client.
2) In the Contact Center Client ribbon, click **Real Time**.
3) Click **Interactive Visual Queue**.
   The Add/Remove device IDs window opens.
4) Select the queue group(s) or queue(s) that you want to monitor and click **OK**.
   See the following figure.
   NOTE:
   – Virtual,Reporting, and Unified Queue Groups are shown in the Queue groups list.

Figure 19: Interactive Visual Queue monitor



Accessing queue and interaction information and statistics

To access detailed multimedia queue information, including voice, refer to the Interactive Visual Queue Queued media grid. Here you will find the statistics you need to make informed decisions to ensure interactions are being handled efficiently within your business.

The following list provides descriptions of the column headings available in the Queued media grid:

- *Position (#)* displays the answer position relative to other interactions in the queue
- *Media icon* displays the media type
- Queue Name displays the name of the queue
- Queue Dialable displays:
  - Voice—the dialable number of the queue
  - Chat—Queue Auto Response User Name
  - SMS—the dialable number of the queue
  - Email—Email address of the queue
- *Priority* is the priority of the interaction in the queue (the lower the number, the higher the priority)
- *Time in Queue* is the interaction's total time in the current queue
- *Time Offered to System* is the time the interaction first entered the system
- *Time in System* is the interaction's total time in the system
- *Queue Hops* is the number of times an interaction has changed queues
- *ANI (Contact ID)* displays:

- Voice—caller # / ANI
- Chat—Chat email address from pre-chat form
- SMS—From mobile number
- Email—From email address

- Subject displays
  - Voice—blank
  - Chat—Chat subject from pre-chat form
  - SMS—blank
  - Email—Email subject
- *Is Callback* indicates if the queued media is a callback request (voice only)
- *Service level countdown* provides a countdown in seconds when the contact will exceed the target time to meet the service level
- *Contact Name* is the name associated with the contact (if available)
  - Voice—caller ID
  - Chat—Chat name from pre-chat form
  - SMS—blank
  - Email—Email “From” name, if available
- *Time Offered to Queue* is the time the contact entered the current queue
- *DNIS (To Address)* displays
  - Voice—DNIS Number
  - Chat—blank
  - SMS—blank
  - Email—receiver's email address
- *To Name* displays
  - Voice—DNIS Name, if configured in YourSite Explorer for the associated DNIS number
  - Chat—blank
  - SMS—blank
  - Email—Email "To" name, if available
- *Collected Information* displays the single or series of collected results provided by IVR Routing or Intelligent Queue. Collected information requires IVR Routing or Intelligent Queue, Verified Collected Digits and, optionally, Remote Database Verification or CTI Developer Toolkit
- *Queue Reporting* is the queue’s reporting number

For information on other Interactive Visual Queue grids that are voice media only, see *"Interactive Visual Queue monitor grids"*. For information on hiding or making columns visible, sorting data in a column, or re-arranging columns, see *"Real-time Monitors"*.

Understanding interaction priority

Each queue has a default priority level. When an interaction enters the system for the first time, the interaction adopts the default priority of whichever queue it enters. If all interactions in a queue have the same priority, the position of the interactions are based on each interaction's total time in the current queue. If a queue contains interactions that have multiple priority levels, higher priority interactions will have a higher position in the queue than lower priority interactions.

As long as an interaction remains in a queue, it maintains its priority. However, if an interaction moves from one queue to another queue, the interaction's priority may change, based on the method used to move the interaction.

When you redirect an interaction manually, the interaction always adopts the default priority level of the destination queue.

When you redirect an interaction manually, the interaction always adopts the default priority level of the destination queue. For example, suppose Queue 1 has a priority of 1 and Queue 2 has a priority of 15. When an interaction first enters Queue 1, it has a priority of 1. However, if you manually move that interaction to Queue 2, using either a drag-and drop operation or the right-click menu, the interaction priority lowers to 15. The rules work the same in reverse. If you manually move a priority 15 interaction from Queue 2 to Queue 1, the interaction priority increases to 1 when it enters Queue 1.

Interactions interflowed automatically retain the original interaction priority.

Redirecting interactions

An interaction can move between queues automatically (interflow) or manually (redirection).

Interflow

You can configure Inqueue workflows to automatically move an interaction from one to queue to another after a specific duration through the Interflow activity. For example, you could configure your system to move an interaction from Queue 1 to Queue 2 if the interaction has not been answered within 30 seconds. For more information on the Interflow activity, see *"Routing interactions with the Interflow activity"*.

Redirection

Using Interactive Visual Queue, you can manually redirect an interaction from a queue to another queue, to an agent, or, if it is a voice interaction, a dialable number.

There are two ways a voice interaction can be removed from the system. If a voice interaction is moved more than 10 times, either by redirection or by interflow, the interaction is dropped from the system. You can see the current number of times an interaction has moved between queues in the Queue Hops column. A voice interaction will also be automatically removed from the system if its total time in the system exceeds 24 hours. The Total Time column lists the interaction's duration in the system. Email, SMS and chat interactions are removed from the system if they are offered to agents over 50 times.

If an interaction is an email interaction, it can also be set to No Reply or Junk and removed from the system.

You can manually redirect an interaction in the Queued media grid using the following methods:

- Drag and drop an interaction between queues.
- Use the right-click menu to move an interaction between queues.
- Use the right-click menu to send an interaction to a specific dialable number or email address

You may notice that the first two methods perform the same action. However, the second method is convenient when a queue monitor is maximized and you want to move an interaction without having to resize one or more monitors.

You can remove interactions in the Interactive Visual Queue Monitor in the following ways:

- Delete voice interactions from the monitor (voice only)
- Tag emails as No Reply needed
- Tag emails as Junk

When you manually redirect (drag and drop) an interaction in Interactive Visual Queue, Mi Contact Center Business changes the way the voice interaction is pegged on the Queue Performance reports. If you redirect an interaction before the short abandon time set for the queue, the interaction is pegged as *Unavailable*. If you redirect an interaction after the short abandon time set for the queue, the interaction is pegged as *Interflowed*. An internal ACD interaction is pegged as *Abandoned* if the interaction is redirected at any time.

Redirecting multimedia interactions between queues

To drag and drop interactions between queues

1) In the Queued media grid, click anywhere in the row of the interaction you want to move.
2) Use a drag-and-drop operation to move the interaction from its original queue monitor to a new queue monitor.

   NOTE:

   – You can only drag an interaction from one Interactive Visual Queue monitor to another if the destination monitor has the same media type (such as email to email, chat to chat, etc.).
   – Only one interaction can be moved over at a time.
   – If the destination monitor has multiple queues for the same media type, the system will assign the redirected interaction to the queue with the fewest interactions in queue.

To redirect an interaction between queues using the menu

1) In the Queued media grid, right-click the row of the interaction you want to redirect and click **Send to > Queue**.

   A list of available queues displays.

   NOTE: You can use the search button to locate a specific queue, either by name or reporting number.
2) Click the name of the queue to which you want to redirect the interaction.
3) Click **OK**.

Alternatively, to redirect an interaction from one queue to another queue

1) In the Queued media grid, right-click the row of the interaction you want to redirect and click **Send to**.
2) In the list of queues beneath **Queue**, select a queue.

Redirecting multimedia interactions to agents

You can transfer interactions in queue directly to agents who are available or in Make Busy/Overloaded states. Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred interactions and do not appear in the list of available agents.

To redirect multimedia interactions to agents

1) In the Queued media grid, right-click the row of the interaction you want to redirect and click **Send to > Agent**.

   A list of available agents who can handle the interaction's media type displays.

   NOTE: You can use the search button to locate a specific agent, either by name or reporting number.

2) Click the name of the agent to which you want to send the interaction.
3) Click **OK**.

Redirecting email interactions to specific email addresses

Using the Send to menu option, you can redirect interactions in Interactive Visual Queue to any email address.

To redirect an email interaction to another email address

1) In the Queued media grid, right-click the row of the email interaction you want to redirect and click **Send to > [Destination]**.
2) When you click [Destination], it changes to a text box.
3) Type an email address into the text box and press **Enter**.

   You can enter multiple email addresses, separating each with a semi-colon (e.g. recipient1@email.com;recipient2@email.com).

   NOTE: If you are licensed to access multimedia functionality in Ignite, you can alternatively redirect interactions directly to an agent by forwarding or transferring. See "Handling emails in Ignite" and *"Handling chats in Ignite"*.

Tagging emails and SMS as Junk

Supervisors can mark email or SMS interactions in an Interactive Visual Queue monitor as junk, removing junk interactions from the queue.

To tag an email or SMS interaction as Junk

1) In the Queued media grid, select the interaction(s) you want to tag as Junk.

   *Select multiple emails by holding **CTRL** or **Shift** and clicking the emails.*

2) Right-click the row of the interaction you want to tag as Junk.
3) Click **Junk Conversation**.
4) Click **Yes**.

NOTE:

- Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- If you are licensed to access multimedia functionality in Ignite, you can alternatively tag emails as Junk using Ignite. See *"Marking emails as No Reply and Junk"*.

Tagging email and SMS interactions as No Reply Needed

Supervisors can mark email and SMS interactions in an Interactive Visual Queue monitor as requiring no reply, such as out of office emails, removing them from the queue.

To tag an email and SMS interaction as No Reply needed

1) In the Queued media grid, select the interaction you want to tag as No Reply needed.

   *Select multiple interactions by holding **CTRL** or **Shift** and clicking the emails.*

2) Right-click the row of the interaction you want to tag as No Reply needed.
3) Click **No Reply**.

NOTE:

- Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- If you are licensed to access multimedia functionality in Ignite, you can alternatively tag email and SMS interactions as No Reply Needed using Ignite. See *"Marking emails as No Reply and Junk"* and *"Marking SMS contacts as No Reply and Junk"*.

Redirecting multimedia interactions between queues

To drag and drop interactions between queues

1) In the Queued media grid, click anywhere in the row of the interaction you want to move.
2) Use a drag-and-drop operation to move the interaction from its original queue monitor to a new queue monitor.

   NOTE:

   – You can only drag an interaction from one Interactive Visual Queue monitor to another if the destination monitor has the same media type (such as email to email, chat to chat, etc.).
   – Only one interaction can be moved over at a time.
   – If the destination monitor has multiple queues for the same media type, the system will assign the redirected interaction to the queue with the fewest interactions in queue.

To redirect an interaction between queues using the menu

1) In the Queued media grid, right-click the row of the interaction you want to redirect and click **Send to > Queue**.

   A list of available queues displays.

   NOTE: You can use the search button to locate a specific queue, either by name or reporting number.

2) Click the name of the queue to which you want to redirect the interaction.
3) Click **OK**.

Alternatively, to redirect an interaction from one queue to another queue

1) In the Queued media grid, right-click the row of the interaction you want to redirect and click **Send to**.
2) In the list of queues beneath **Queue**, select a queue.

Redirecting multimedia interactions to agents

You can transfer interactions in queue directly to agents who are available or in Make Busy/Overloaded states. Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred interactions and do not appear in the list of available agents.

To redirect multimedia interactions to agents

1) In the Queued media grid, right-click the row of the interaction you want to redirect and click **Send to > Agent**.

   A list of available agents who can handle the interaction's media type displays.

   NOTE: You can use the search button to locate a specific agent, either by name or reporting number.

2) Click the name of the agent to which you want to send the interaction.
3) Click **OK**.

Redirecting email interactions to specific email addresses

Using the Send to menu option, you can redirect interactions in Interactive Visual Queue to any email address.

To redirect an email interaction to another email address

1) In the Queued media grid, right-click the row of the email interaction you want to redirect and click **Send to > [Destination]**.
2) When you click [Destination], it changes to a text box.
3) Type an email address into the text box and press **Enter**.

   You can enter multiple email addresses, separating each with a semi-colon (e.g. recipient1@email.com;recipient2@email.com).

   NOTE: If you are licensed to access multimedia functionality in Ignite, you can alternatively redirect interactions directly to an agent by forwarding or transferring. See *"Handling emails in Ignite"* and *"Handling chats in Ignite"*.

Tagging emails and SMS as Junk

Supervisors can mark email or SMS interactions in an Interactive Visual Queue monitor as junk, removing junk interactions from the queue.

To tag an email or SMS interaction as Junk

1) In the Queued media grid, select the interaction(s) you want to tag as Junk.

   *Select multiple emails by holding **CTRL** or **Shift** and clicking the emails.*

2) Right-click the row of the interaction you want to tag as Junk.
3) Click **Junk Conversation**.
4) Click **Yes**.

NOTE:

- Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.

- If you are licensed to access multimedia functionality in Ignite, you can alternatively tag emails as Junk using Ignite. See *"Marking emails as No Reply and Junk"*.

Tagging email and SMS interactions as No Reply Needed

Supervisors can mark email and SMS interactions in an Interactive Visual Queue monitor as requiring no reply, such as out of office emails, removing them from the queue.

To tag an email and SMS interaction as No Reply needed

1) In the Queued media grid, select the interaction you want to tag as No Reply needed.

   *Select multiple interactions by holding **CTRL** or **Shift** and clicking the emails.*

2) Right-click the row of the interaction you want to tag as No Reply needed.
3) Click **No Reply**.

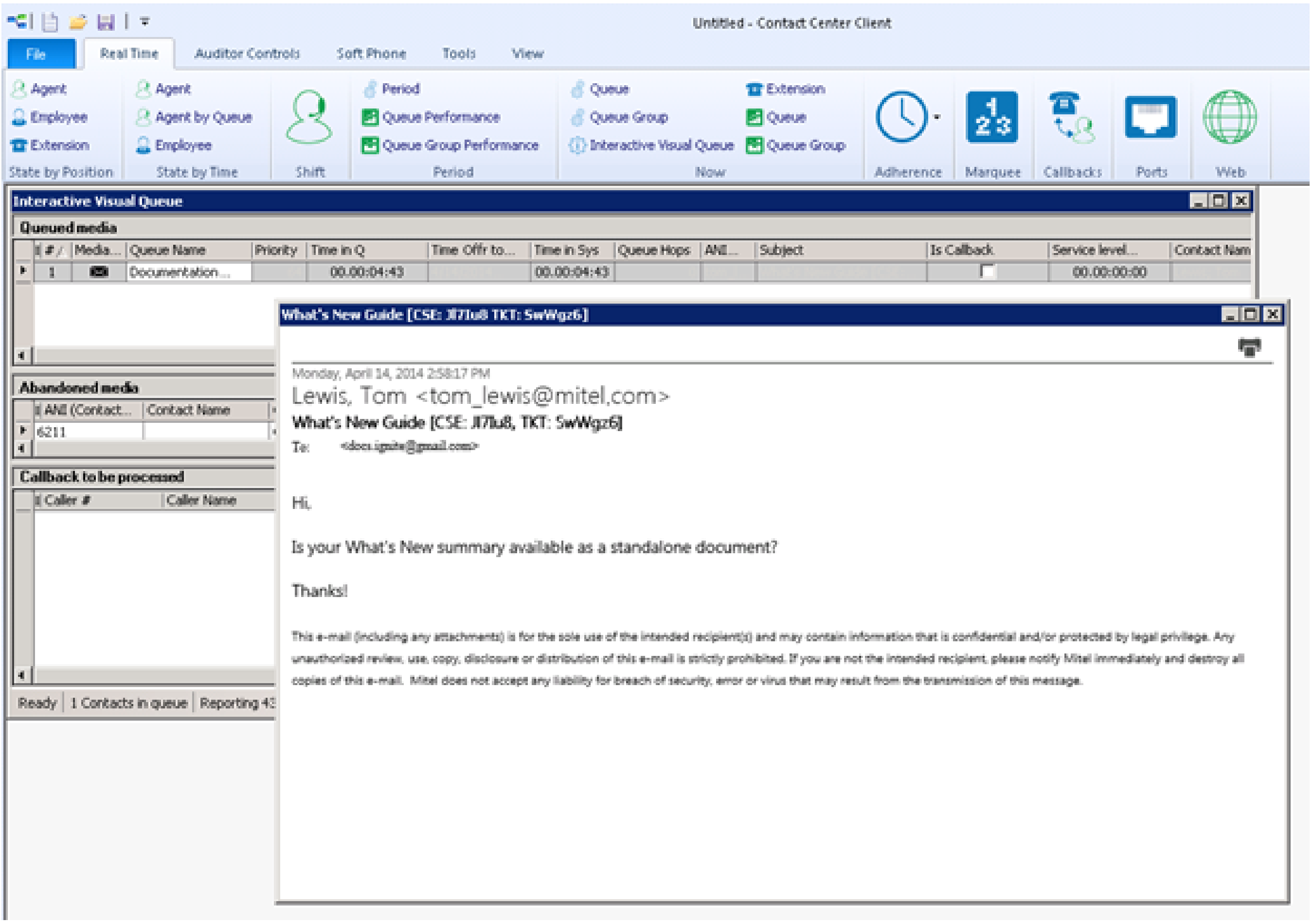
NOTE:

- Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- If you are licensed to access multimedia functionality in Ignite, you can alternatively tag email and SMS interactions as No Reply Needed using Ignite. See *"Marking emails as No Reply and Junk"* and *"Marking SMS contacts as No Reply and Junk"*.

Previewing queued multimedia interactions

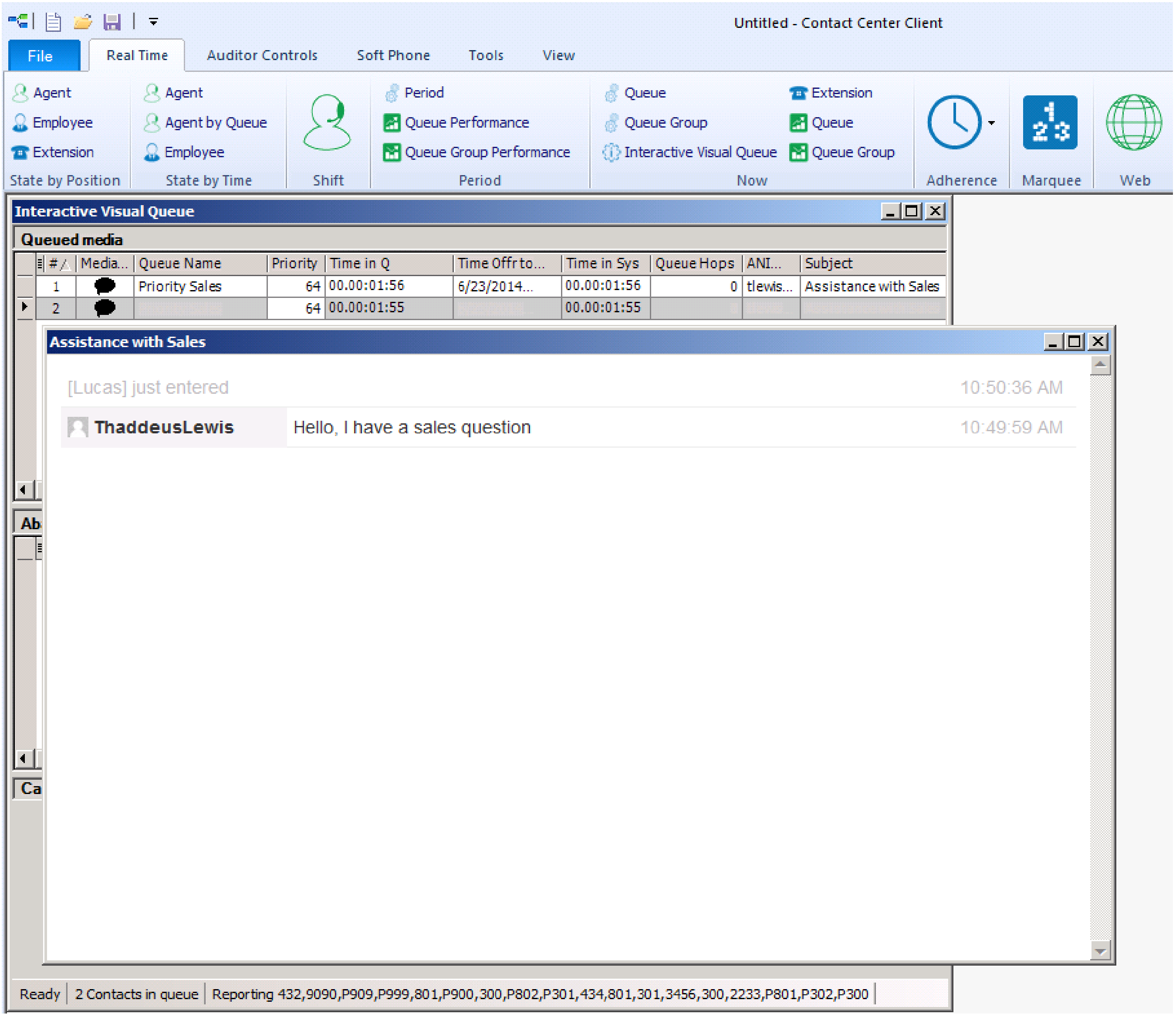
Supervisors monitoring queues in Interactive Visual Queue can preview the contents of queued email, SMS and chat interactions. The following figure shows a previewed email. Previewed emails display in a new window that shows the contents of the email. Supervisors can preview embedded files in the email and download attachments, such as images and e-signatures, but they cannot edit previewed emails, however, nor can they preview an email in an agent's inbox. A supervisor can only have one email preview open at a time.

Figure 20: Previewed email



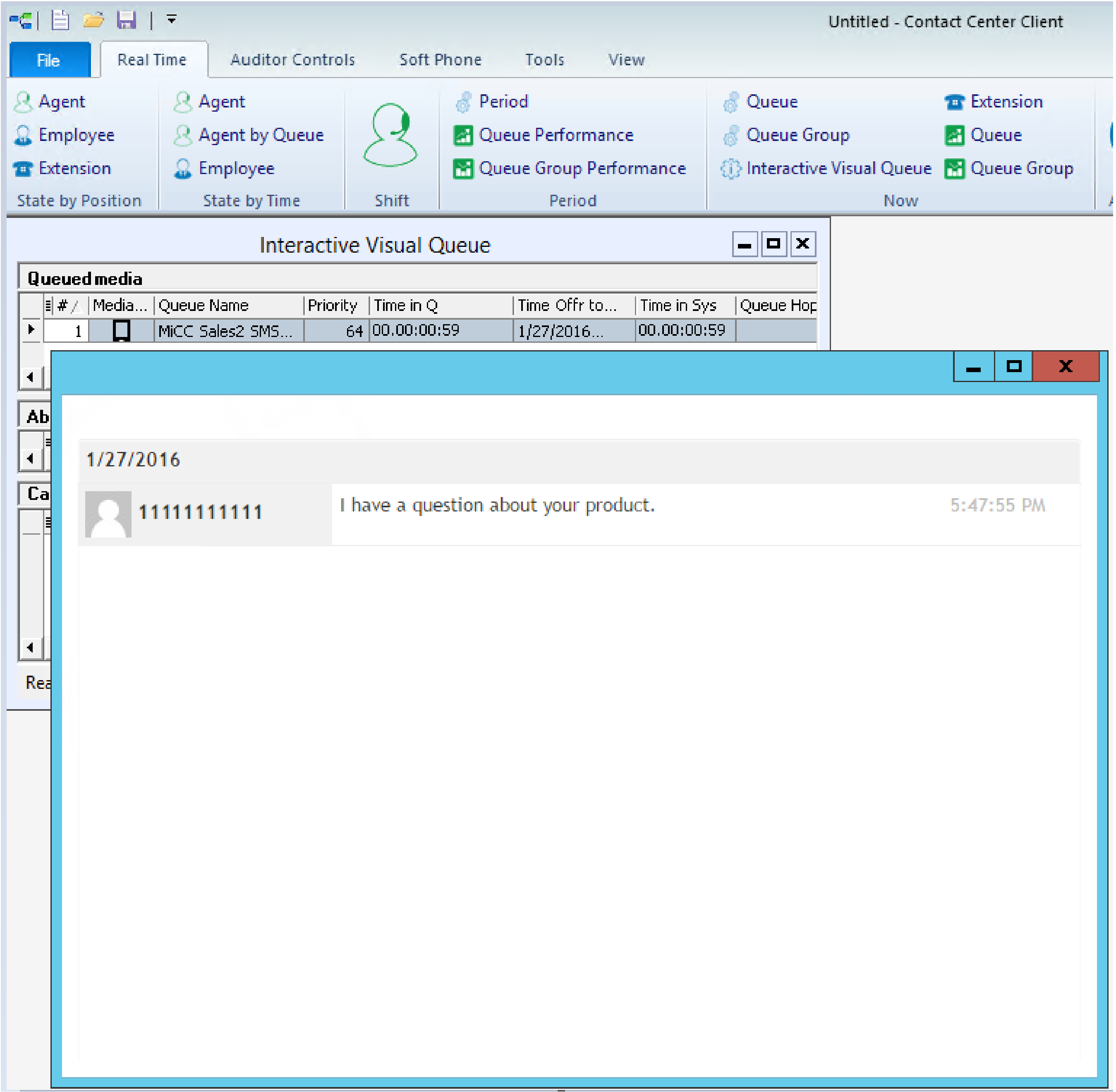
The following figure shows a previewed chat session. Previewed chats show the content of the chat session. Supervisors can open links in the previewed chat session, but they cannot view embedded media or participate in the chat. A supervisor can only preview one chat at a time. Supervisors previewing chats must have an associated chat agent.

Figure 21: Previewed chat



The following figure shows a previewed SMS interaction. Previewed SMS interactions show the content of the SMS session. Supervisors can open links in the previewed SMS session, but they cannot view embedded media or participate in the SMS interaction. A supervisor can only preview one SMS interaction at a time. Supervisors previewing SMS interactions must have an associated SMS agent.

Figure 22: Previewed SMS



While the preview window is open, no other actions can be taken in Contact Center Client, although you can still answer phone calls from the desktop notification. Previewing a multimedia interaction does not impact the ability of that multimedia interaction to interflow to another queue, to be offered to or picked by an agent, or any other activity in Multimedia Contact Center.

The following procedures take place in an open Interactive Visual Queue monitor in Contact Center Client.

To preview a multimedia interaction

- Right-click the email, SMS or chat you want to preview and select **Preview**.

To print an email preview window

- Click the **printer** icon in the email preview.

Removing interactions from Interactive Visual Queue monitors

Interaction can be removed from Queued and Abandoned media monitors. Deleting an interaction from Interactive Visual Queue does not remove the interaction from the actual queue. Instead, it removes the interaction from the monitor and stops Interactive Visual Queue from tracking it.

To remove an interaction from Interactive Visual Queue

1) Right-click the row of the interaction you want to remove.
2) Click **Delete**.
   The interaction is removed from Interactive Visual Queue

History (WEB)

The History page contains a searchable archive of all calls handled by an agent as well as calls sent to the queues for which the agent answers. Agents can filter these historical interactions by type, limit the display interactions to items the agent has handled, or search for specific interactions.

Supervisors can filter all the interactions by type and also view the interactions that are being handled by agents and are in agent's Inbox, or put on hold, or are in draft state. This gives the supervisor a better visibility into the interactions that are being handled by the agents.

NOTE: Supervisors will not be able view agents' SMS interactions that are in draft state.

You can also reply to participants of all interactions (except Chat) from History. When you select an interaction in History, in addition to the handling options, you can quickly access the case details, notes, interactions, all the participants of the case, other cases from the same customer, and URLs by using the corresponding tabs. This saves time when you are interacting with a customer. For more information about these tabs, see the *"Cases (WEB)"*.

An agent can view any interaction's variable values that contain a URL under a separate tab, URLs. The URLs tab consists of a drop-down with all the variables and their associated value (URL). By default, the first URL is displayed in the frame. To open the URL in a new window, click **Open**.

You can choose to view the interactions in List view or in Grid view by clicking the respective option. See the *"List pane (WEB)"*.

For more information on filtering historical interactions, see *"Filtering historical contacts (WEB)"*.

For more information on searching interactions in History, see *"Searching 's folders"*

For more information on reviewing interaction history, see *"Reviewing interaction history"*.

For more information on sending replies to participant(s), see *"Replying to participant(s) of a case from History (WEB)"*.

Replying to participant(s) of a case from History

From the **History** tab, you can reply to email, SMS, or voice interaction without manually entering the participant's contact details.

The following are the important details you must note while sending email, SMS, and voice replies to the participants:

- You can reply to a participant of a single case at a time.
- Participant's contact details must be available.
- The interaction thread and Case Id are preserved.
- The 'From' address is pre-selected if and only if the last interaction is an email.
- The subject of the new interaction is prepended by 'RE: the subject of the last interaction [case and ticket information]' (i.e. RE: Test e-mail [CSE: Case: Ticket Information]) if and only if the last interaction is an email.
- By default, the status of the case is "Waiting For Customer", if the case requires more follow-up, the agent has to manually change the state of a case to "Follow up required".

To send email replies to participant(s) of a case from History

1) Click **History** and, optionally, select a **Filter:**.
2) From the list of interactions, click any interaction you want, or, optionally search for the interaction.
3) To select a participant, in the **Participants** tab, highlight the participant record you want and click **Email** button
4) To select all or some participants, in the **Participants** tab, hover over the participant's avatar and click to select all or some participants and click **Email** button.

   *In the email reply editor, the participant's email address is automatically inserted in the **To** field. The subject of that email is prepended by 'RE: the subject of the last email interaction [case and ticket information]'.*
5) Type the content and click **Send**.

To send an SMS reply to a participant of a case from History

1) Click **History** and, optionally, select a **Filter:**.
2) From the list of interactions, click any interaction you want, or, optionally search for the interaction.
3) In the **Participants** tab, highlight the participant record you want, or, hover over the participant's avatar and select.
4) Click **Text** button.

   *The participant's phone number is automatically inserted in **To** field. Click **From** to select the SMS queue before sending the reply message.*
5) Type the reply message and press **Enter**.

To call back a participant of a case from History

1) Click **History** and, optionally, select a **Filter:**.
2) From the list of interactions, click any interaction you want, or, optionally search for the interaction.
3) In the **Participants** tab, highlight the participant record you want to dial to, or, hover over the participant's avatar and select.
4) Click **Call** button.

Reviewing interaction history

Ignite stores transcripts of email, chat, and SMS multimedia interactions and enables agents to review these transcripts by case and customer.

For example, an agent gets a response from a customer saying, 'How do I do that?'. However, the customer has deleted all prior communication in the email chain. The agent can retrieve transcripts of previous interactions with the customer in order to answer the question.

If an interaction's history is not visible via the History function, we recommend searching Ignite's repository. For more information on searching, see *"Searching Ignite"*.

The following procedures explain how to

- Review interaction history by case

  NOTE: This function is only available if the system has case and ticket numbers enabled. This is an administrative configuration and cannot be adjusted by agents.
- Review interaction history by customer

To review interaction history by case or customer (WEB)

NOTE: You can pare down the list of interactions displaying on the History page using filters. For information, see *"Searching Ignite using search filters"*.

1) Select an interaction or hover over the item's avatar and select **History**.
2) Select either **Case** or **Customer** and select the interaction to review.

   You can display specific interactions by entering search criteria in the 'Search interactions' field.
3) To exit out of this view, click **Back to <page>**.

To review interaction history by case (DESKTOP)

1) In the **Folders** pane, select a folder and select an interaction in the folder.
2) In the **Preview** pane, select **History** and **Account Codes**, and select By Case.
3) To see more items, double-click **Show more results...**.
4) Optionally, sort items in each pane in ascending or descending order by clicking the column headers.
5) To view a transcript of the communication, double-click the interaction in the pane.

To review interaction history by customer (DESKTOP)

1) In the **Folders** pane, select a folder and select an interaction in the folder.
2) In the **Preview** pane, select **History** and **Account Codes**, and select **By Customer**.
3) To see more items, double-click **Show more results...**.
4) Optionally, sort items in each pane in ascending or descending order by clicking the column headers.
5) To view a transcript of the communication, double-click the interaction in the pane.

Filtering historical interactions (WEB)

There are six filters for interactions in History:

- **All**—All interactions.

- **Handled**—All interactions to which the agent has replied or transferred from reply mode.

  NOTE: For email, the Handled folder displays only the original, inbound emails
- **Sent**—All outbound emails and SMS interactions and agent replies to email interactions.
- **No Reply**—Contains email and SMS interactions designated as needing no reply, such as out of office messages.
- **Junk**—Contains email and SMS interactions designated as Junk.
- **Failed**—Contains voice, email, chat, SMS, and open media interactions that were unable to route.

Historical interactions can also be limited to only interactions you have handled or sent display, rather than all interactions for the queues you handle.

Supervisors can filter all the interactions by type and also view the interactions that are being handled by agents and are in agent's Inbox, or put on hold, or are in draft state. This gives the supervisor a better visibility into the interactions that are being handled by the agents.

Supervisors are provided with these additional filters:

- **Inbox**—All interactions that are in the Inbox state.
- **Hold**—All interactions that agents have put on hold.
- **Draft**—All interactions that are in the Draft state. Supervisors can further view the type of draft state: New Draft, Inbox Draft, Hold Draft, or Forward Draft

NOTE:

- Supervisors will not be able view agents' SMS interactions that are in **Draft** state.
- Agents will be able to **Reply** and **Reply All** to the email interactions that are in **Handled**, **Sent**, **No Reply**, and **Junk** historical states.
- Agents will not be able to **Reply** and **Reply All** to the email interactions that are in **Inbox** and **Failed** historical states.

The interactions contained in each filter can be searched for more specific interactions. For more information, see *"Searching Ignite"*.

The following procedures explain how to

- Filter historical interactions
- Limit displayed interactions to only your items

To filter historical interactions

1) Click **History**.
2) Select the **Filter**.

To limit displayed interactions to only your items

1) Click **History**.
2) Select **Only show my items**.

NOTE: The agent who has worked last on a particular call gets the ownership of the calls and is displayed in that agent's call history when the **Only show my items** option is checked.

For example, if Agent A answers a call and then transfers to Agent B, this call is not displayed in Agent A's history if the **Only show my items** option is checked. It is displayed in Agent B's history when the **Only show my items** option is checked.

Replying to participant(s) of a case from History

From the **History** tab, you can reply to email, SMS, or voice interaction without manually entering the participant's contact details.

The following are the important details you must note while sending email, SMS, and voice replies to the participants:

- You can reply to a participant of a single case at a time.
- Participant's contact details must be available.
- The interaction thread and Case Id are preserved.
- The 'From' address is pre-selected if and only if the last interaction is an email.
- The subject of the new interaction is prepended by 'RE: the subject of the last interaction [case and ticket information]' (i.e. RE: Test e-mail [CSE: Case: Ticket Information]) if and only if the last interaction is an email.
- By default, the status of the case is "Waiting For Customer", if the case requires more follow-up, the agent has to manually change the state of a case to "Follow up required".

To send email replies to participant(s) of a case from History

1) Click **History** and, optionally, select a **Filter:**.
2) From the list of interactions, click any interaction you want, or, optionally search for the interaction.
3) To select a participant, in the **Participants** tab, highlight the participant record you want and click **Email** button
4) To select all or some participants, in the **Participants** tab, hover over the participant's avatar and click to select all or some participants and click **Email** button.

   In the email reply editor, the participant's email address is automatically inserted in the ***To*** *field. The subject of that email is prepended by 'RE: the subject of the last email interaction [case and ticket information]'.*
5) Type the content and click **Send**.

To send an SMS reply to a participant of a case from History

1) Click **History** and, optionally, select a **Filter:**.
2) From the list of interactions, click any interaction you want, or, optionally search for the interaction.
3) In the **Participants** tab, highlight the participant record you want, or, hover over the participant's avatar and select.
4) Click **Text** button.

   The participant's phone number is automatically inserted in ***To*** *field. Click* ***From*** *to select the SMS queue before sending the reply message.*
5) Type the reply message and press **Enter**.

To call back a participant of a case from History

1) Click **History** and, optionally, select a **Filter:**.
2) From the list of interactions, click any interaction you want, or, optionally search for the interaction.
3) In the **Participants** tab, highlight the participant record you want to dial to, or, hover over the participant's avatar and select.
4) Click **Call** button.

Cases (WEB)

The Case page contains searchable details for all cases that the employee can access. Agents and supervisors can quickly review all the key information related to case records without the need to select individual interaction.

For example, an agent in the Sales queue handling an email can review the interaction history for that case, or preview other interaction to that case. Agents can also move an interaction to or merge interactions from another case.

NOTE: When upgrading from MiContact Center 7.x or 8.x or 9.x to MiContact Center Business 9.2 cases are automatically created for emails (beginning with the most recent email and ending with the oldest email). Emails that are associated to a particular customer calls are grouped within a single case to consolidate information.

In addition, contact information based on historic emails is added to the MiContact Center Business database. For MiContact Center version 8.1 customers who implemented the Omni Channel Tech Preview cases are also created for SMS and Chat during an upgrade to MiContact Center Business version 9.2.

Cases are deleted when the email interaction related to the customer are all Junked. If an email is accidentally set as 'Junked' and it would be the only item in a case, you must find and forward it to the customer to enable it to display in the list of cases.

For more information on handling cases in Ignite (WEB), see *"Working with cases in Ignite(WEB)"*.

Working with cases in Ignite(WEB)

The **Cases** page contains searchable details for all cases that the employee can access. Agents and supervisors can quickly review all the key information related to case records without the need to select individual interactions.

The following sections explain how to

- View case details
- Search and filter cases
- Add notes for a case
- Edit the subject of a case
- Flag a case for follow-up
- Flag a case as resolved
- Merge interactions from two different cases

NOTE: You cannot edit a case that is being edited by another agent or supervisor. A lock icon displays next to the action icons to indicate that a case is being edited by another agent or supervisor. Only one person can perform the following actions at a time in Ignite—edit the subject of the case, change the state of the case, add or edit notes, cut from case, or merge cases.

View case details

For each of the case records, you can view the state of the case, notes, interactions, customer details, and other cases that are associated with the customer.

1) Click **Cases** to display a list of all cases.
2) Locate and click the case title.

If you know the case details, you can use the search and filter capabilities to locate the required case.

The following case details are displayed:

- **Case details**—Displays case details such as customer details, subject, details of the agent who handled the last interaction in the case, or the queue details, date modified, and the state.
- **Notes**—Lists the notes entered for the selected case. You can search for notes by entering the string in the search field in the Notes tab.
- **Interactions**—Lists all interactions related to the selected case. You can filter and search for interactions in this tab.
- **Participants**—Lists the contact details of all participants.
- **Other cases for this customer**—Lists the other cases associated with this customer(s). You can filter and search for cases in this tab.
- **State**—Indicates the current state of the case. Possible values include
  - **Pending**—Cases are indicated by  icon. Cases are automatically assigned this state when inbound interactions are received by the system. This state is assigned even if the linked case was previously closed. The only exception is when a new interaction is already linked to an existing case whose state is marked as 'Follow up required'. You can see cases in the pending state only for the queues to which you are assigned.
  - **In Progress**—Cases are automatically assigned this state when you accept interaction associated with that case. The only exception is when a new interaction is already linked to an existing case whose state is marked as 'Follow up required'.
  - **Follow up required**—Cases are indicated by a red badge. When an agent handles an interaction, and wants to mark the interaction for further follow up, the case can be flagged as 'Follow up required'.
  - **Follow up required now**—Cases are indicated by a red badge. When an agent marks an interaction for a follow up at a specific date and time, just before the specified date and time, the interaction is which is flagged as 'Follow up required' changes to 'Follow up required now', a notification icon on the top panel prompts the agent to take action on the interaction.
  - **Waiting for customer**—Cases are indicated by an orange badge. When an agent completes an interaction, or marks the interaction as 'No Reply', the case's state is set to 'Waiting for customer' unless it was previously set to 'Follow up required' or 'Resolved', in which case it

remains unchanged. When an agent sends an unsolicited outbound email or SMS to a customer, a new case is automatically created and assigned with this state.

– **Resolved**—Cases are indicated by a blue check mark icon. You can set the case to 'Resolved' when you no longer need to interact with or track it. Cases in 'Waiting for customer' state are automatically moved to 'Resolved' state after the configured number of days (by default, it is 14 days) when no interactions are added or actions are taken.

– **Closed**—Indicated by icon. Cases in 'Resolved' state are automatically moved to 'Closed' state after the configured number of days (by default, it is 7 days) when no interactions are added, or actions are taken.

Edit the subject of a case

To edit the subject of a case

1) Click **Cases** to display a list of all cases,
2) Locate and click the required case from the list.

   The details are displayed in the right pane. The default subject is based on the most recent interaction associated to the case, relevant to the interaction media type.
3) Click **Edit Subject** icon.
4) Enter the subject in the text box.
5) Click **Save**.

Search and filter cases

To search and filter cases

1) Click **Cases**, and in the **Search cases** field, enter a search string.
2) For a more detailed search, click the **Advanced Search** in the **Search cases** field and enter specific details in the fields displayed. For **Media, Queue, and Employee** fields, you can use the **Only search most recent** check box next to fields to search for cases having the particular media, queue, or employee as their last one.

   For example, let us assume that there is a case linked to two interactions; a chat (first interaction) and a voice call (second and last interaction). If you select "chat" in the ***Media*** *drop-down menu and:*

   – Do not select the **Only search most recent** check box next to **Media**, Ignite will find this case because it will search for all cases that have a chat interaction.

   – Select the **Only search most recent** check box next to **Media**, Ignite will only search for cases whose most recent interaction type is "chat", hence, the above case is not found as the last interaction for the above case is not "chat", but is "voice".
3) Click **Search** to display the search results.
4) Click the filter name to filter the search results based on case states. The available filters are **All**, **Pending**, **In progress**, **Waiting for customer**, **Follow up required**, **Resolved** and **Closed**.

   NOTE:

- If an agent selects the **Only show my items** check box, Ignite displays only cases associated with that agent.
- In Case folder, agents will be able to **Reply** and **Reply All** to the email interactions only in **Waiting for Customer**, **Follow up required**, **Resolved**, and **Closed** case states.
- In Case folder, agents will not be able to **Reply** and **Reply All** to the email interactions in **Pending** and **In progress** case states.

Export the case details to a CSV file

To Export a case details to a .csv file

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.
   The details are displayed in the right pane.
3) Click the **Export to csv** icon. The case details are downloaded in a .csv file format.

Flag a case for follow up

To flag a case for follow up

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.
   The details are displayed in the right pane.
   NOTE: This state can only be set for cases that are currently in an 'In Progress', 'Waiting for customer', or 'Resolved' state.
3) Click the **Flag for follow up** icon. The **Case Follow-up** screen is displayed.
4) Select the notification date and time. If you are a supervisor, you can choose an agent you want to notify.
5) Click **OK**. You will receive a reminder notification at the set date and time. You can review the case by clicking the notification toaster from your Inbox.
   *In case you want to edit the notification details, click the **Follow up Reminder** icon and make the changes.*

Flag a case as resolved

To flag a case as resolved

1) Click **Cases** to display a list of all cases.
2) Locate and click the required case from the list.
   *The details are displayed in the right pane. Any new case that is responded to, is flagged as **Waiting for customer** and denoted by an orange badge.*
3) Click the **Resolve** icon. A confirmation window is displayed.
4) Click **OK**.

Merge Cases

When a customer is associated with more than one case, some or all of the cases, and their interactions and notes, can be merged into a single case to consolidate information.

To merge cases (and their associated interactions and notes) into a single target case

1) Click **Cases**.
2) From the list of cases, click the case you want to merge into the target case.
3) In the **Other Cases for this customer** tab, click **Merge**.
4) In the **Confirm the merge of case** dialog box, click **OK**.

NOTE: When merged, all notes and interactions from the original case are moved to the target case and the original case is deleted. If the target case was closed before the merge, it is only reopened after the merge if the original case was neither closed nor reopened, and its new state will match the state of the original case.

Notes associated with cases

The **Notes** page lists the notes entered by the agent for the selected case. You or any other agent associated with the case can refer to these notes during the resolution of the case. You can also view notes that are automatically generated by the system when the following events occur—state change, case merger, and calls are cut and pasted into a new or an existing case.

To search notes

- In the **Notes** tab, type the text in the **Search notes** field. Optionally, you can include the system notes to your search by clicking **Show system notes** option.

To add notes

1) Click **Cases** to display a list of all cases.
2) Locate and click the required case from the list.

   The details are displayed in the right pane.
3) Click the **Notes** tab.

   Notes related to the selected case are displayed.
4) Click **Add Note**.
5) Enter the note in the text box.
6) Click **Save**.

To edit notes

1) In the **Notes** tab, and click **Edit**.
2) Edit the information that is displayed and click **Save**.

   NOTE: You can only edit the most recent note that you have created.

Interactions associated with cases

The Interactions tab present under History, Inbox, Case or Inqueue pages displays all the calls related to the selected case. Each interaction is assigned with a case ID. Ignite automatically reuses the last Case ID for all the inbound* or outbound interactions associated with the same customer. This helps to keep the related case information together so that the agent doesn't have to manually merge related cases later. Interactions are assigned to a previous Case ID only if the previous case is not closed and not older than the defined default number of days.

*****: When a customer sends an email without a case ID in the subject to the contact center, a new case is always created (Ignite does not reuse an existing case ID).

NOTE: When you initiate an outbound email, the previous case ID is not automatically reused, but Ignite displays the reusable case found and you can choose to reuse the Case ID if you wish to.

You can enable or disable the option to search for reusable cases on the **Options > Customization** page.

You can filter, search, view the status of the interactions, move interactions from a case to another case, and go to the corresponding folders(Inbox, History or Inqueue) from the cases page.

Search and filter interactions

To search and filter interactions

1) Click **Cases** to display a list of all cases.
2) Locate and click the required case from the list.

   The details are displayed in the right pane.
3) Click the **Interactions** tab, enter the string in the **Search interactions** field. The search results are displayed.
4) For a more detailed search:

   Click the down arrow in the Search field and enter the specific details.

   Click the Search icon to display the results.

   *Optionally, you can filter based on case state – All, Draft, Inqueue, Ringing, Inbox, Handled, Sent, No Reply, Junk, and Failed. You can also select the **Only show my items** check box to filter your interactions.*

   *You can also view all the cases, or the customer related to an interaction by clicking **Case** tab or **Customer** tab next to the **Search interaction** field.*

Pick or Pick and Reply inqueue conversation

You can pick or pick and reply all to an Inqueue multimedia interaction from a case.

NOTE: An agent can only Pick or Pick and Reply All to one interaction at a time from a case. Pick, Pick and Reply All are available for Multimedia interactions, whereas only Pick is available for Voice and Open Media interactions (replying to those can only be performed from the Inbox).

To activate Reply, Reply All buttons in the Inbox

1) Click **Options > Customization**.
2) Click **Show 'Reply' button** to activate reply button or click **Show 'Reply All' button** to activate reply all button in the Inbox.
3) Click **Save**.

To reply to a picked Inqueue interaction from Inbox

1) In the **Inbox**, identify and select the Inqueue interaction you just picked.
2) On the right pane, click either **Reply** or **Reply All**.

NOTE: If the email to which you are replying has an existing draft, the **To:**, **CC:**, and **BCC:** fields are cleared and refilled with the default addresses based on the reply type selected

3) The interaction opens in reply mode with all recipients copied. Type the content and click **Send**.

To activate Pick or Pick and Reply All buttons in the Interactions tab

1) Click **Options > Customization**.
2) Click **Show 'Pick'** button to activate pick button or click **Show 'Pick and Reply All'** button to activate pick and reply all button in the **Interactions** tab.
3) Click **Save**.

To pick an Inqueue interaction from within a case

1) Click **Cases**, and from the list of cases, select the case of the Inqueue interaction.
2) In the **Interactions** tab, click **Pick** to assign the Inqueue interaction to yourself.
3) Click **OK**.

To pick and automatically reply to an Inqueue interaction of a case

1) Click **Cases**, and, from the list of cases, select the case of the Inqueue interaction.
2) In the **Interactions** tab, click **Pick and Reply All** to assign the Inqueue interaction to yourself and reply.

NOTE: If the email to which you are replying has an existing draft, the **To:**, **CC:**, and **BCC:** fields are cleared and refilled with the default addresses based on the reply type selected

3) The Interaction opens in reply mode with all recipients copied. Type the content and click **Send**.

Navigate using the Go to button

You can select an interaction listed in the **Interactions** tab present under **Inbox**, **History**, **Cases**, or **Queues** folders and navigate to the interaction in the folder it is currently located in.

For example, for an interaction in your Inbox that contains a related interaction in the History folder, you can navigate to the interactions tab and use the Go to icon next to this related interaction to navigate to the History folder and view the related interaction.

NOTE:

- The Go to button is not displayed for the currently selected interaction in the Inbox, but is displayed only for the other related interactions for the same customer.
- The Go to button is not displayed for the inbox items, that do not belong to you.

To navigate using the Go to icon from cases

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.

   The details are displayed in the right pane.
3) In the **Interactions** tab, click **Go to** icon to navigate to the interaction's current folder.

Moving conversations to other cases

Moving interactions from one case to another might be needed to fix incorrect case linking. You can move one or more interactions from a case to an existing or new case of the same customer.

The following are the important points you must be familiar with before moving interactions from the source case to other cases:

- If the source case is the only case the customer is associated with, you can select one or many interactions to cut from that case, but not "all" of them. The selected interactions will be moved to a new case.
- When the customer has more than one case, you can select one, many, or all interactions from the source case and move them to an existing target case of the same customer.
- The state of the new case will be same as the source case.
- The subject for a case is based on the last interaction associated with the case. Therefore, after interactions are moved from one case to another, the subject of the latter case might change.

Ignite(Web) will automatically re-close a case in the following scenario:

1) Case A was auto-closed after being resolved for a long time.
2) Ignite automatically reopened Case A when a new email with the same case in the subject line was received.
3) Additional interactions may get associated with Case A (i.e. An agent may respond to that email).
4) An agent or supervisor may decide to move all the interactions that were associated with the case (case A) since it was closed to a new case (case B) or another existing case (case C).
5) Case A is auto-closed again.

To move interactions from one case to another case:

1) Click **Cases**.
2) From the list of cases, select the case that contains the interaction(s) you want to move.
3) In the **Interactions** tab, select the interaction from the list. Optionally, you can select multiple interactions from this list.
4) Click **Cut from Case** icon next to the interaction or hover over the interaction avatar and click the **Cut from Case** icon.

   *If you want to move multiple interactions, click the avatar and select many or all interactions, and click **Cut from Case** icon at the top.*
5) Paste the selected interactions to a new case or to an existing case:
   – To paste to a new case, click the **Paste to new case** button. A new case is created containing the interaction you moved there.
   – To paste to an existing case (if there is one for this customer), click the **Paste to other case** button, and search and select the target case in the dialog box that displays.

   NOTE:

   – If you selected all interactions from a case to be moved, all the notes from the case are moved to the target case and the source case is deleted.

– If the selected interactions are not the only interactions for the source case, Ignite will display a list of notes that were created after the first interaction you want to cut, and you can decide which notes (if any) you want to cut and paste it into the target case.

6) Click **OK**.

Forwarding an interaction listed in a case

You can forward an interaction to others if you no longer wish to track the interaction.

To forward an interaction from a case

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.
   The details are displayed in the right pane.
3) Click the **Interactions** tab.
   Interactions related to the selected case are displayed.
4) In the **Interaction** tab, click **Forward** icon.
5) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
6) Type the required content and click **Send**.

Search and filter interactions

To search and filter interactions

1) Click **Cases** to display a list of all cases.
2) Locate and click the required case from the list.
   The details are displayed in the right pane.
3) Click the **Interactions** tab, enter the string in the **Search interactions** field. The search results are displayed.
4) For a more detailed search:
   Click the down arrow in the Search field and enter the specific details.
   Click the Search icon to display the results.
   *Optionally, you can filter based on case state – All, Draft, Inqueue, Ringing, Inbox, Handled, Sent, No Reply, Junk, and Failed. You can also select the **Only show my items** check box to filter your interactions.*
   *You can also view all the cases, or the customer related to an interaction by clicking **Case** tab or **Customer** tab next to the **Search interaction** field.*

Pick or Pick and Reply inqueue conversation

You can pick or pick and reply all to an Inqueue multimedia interaction from a case.

NOTE: An agent can only Pick or Pick and Reply All to one interaction at a time from a case. Pick, Pick and Reply All are available for Multimedia interactions, whereas only Pick is available for Voice and Open Media interactions (replying to those can only be performed from the Inbox).

To activate Reply, Reply All buttons in the Inbox

1) Click **Options > Customization**.
2) Click **Show 'Reply' button** to activate reply button or click **Show 'Reply All' button** to activate reply all button in the Inbox.
3) Click **Save**.

To reply to a picked Inqueue interaction from Inbox

1) In the **Inbox**, identify and select the Inqueue interaction you just picked.
2) On the right pane, click either **Reply** or **Reply All**.

NOTE: If the email to which you are replying has an existing draft, the **To:**, **CC:**, and **BCC:** fields are cleared and refilled with the default addresses based on the reply type selected

3) The interaction opens in reply mode with all recipients copied. Type the content and click **Send**.

To activate Pick or Pick and Reply All buttons in the Interactions tab

1) Click **Options > Customization**.
2) Click **Show 'Pick'** button to activate pick button or click **Show 'Pick and Reply All'** button to activate pick and reply all button in the **Interactions** tab.
3) Click **Save**.

To pick an Inqueue interaction from within a case

1) Click **Cases**, and from the list of cases, select the case of the Inqueue interaction.
2) In the **Interactions** tab, click **Pick** to assign the Inqueue interaction to yourself.
3) Click **OK**.

To pick and automatically reply to an Inqueue interaction of a case

1) Click **Cases**, and, from the list of cases, select the case of the Inqueue interaction.
2) In the **Interactions** tab, click **Pick and Reply All** to assign the Inqueue interaction to yourself and reply.

NOTE: If the email to which you are replying has an existing draft, the **To:**, **CC:**, and **BCC:** fields are cleared and refilled with the default addresses based on the reply type selected

3) The Interaction opens in reply mode with all recipients copied. Type the content and click **Send**.

Navigate using the Go to button

You can select an interaction listed in the **Interactions** tab present under **Inbox**, **History**, **Cases**, or **Queues** folders and navigate to the interaction in the folder it is currently located in.

For example, for an interaction in your Inbox that contains a related interaction in the History folder, you can navigate to the interactions tab and use the Go to icon next to this related interaction to navigate to the History folder and view the related interaction.

NOTE:

- The Go to button is not displayed for the currently selected interaction in the Inbox, but is displayed only for the other related interactions for the same customer.
- The Go to button is not displayed for the inbox items, that do not belong to you.

To navigate using the Go to icon from cases

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.

   The details are displayed in the right pane.
3) In the **Interactions** tab, click **Go to** icon to navigate to the interaction's current folder.

Moving conversations to other cases

Moving interactions from one case to another might be needed to fix incorrect case linking. You can move one or more interactions from a case to an existing or new case of the same customer.

The following are the important points you must be familiar with before moving interactions from the source case to other cases:

- If the source case is the only case the customer is associated with, you can select one or many interactions to cut from that case, but not "all" of them. The selected interactions will be moved to a new case.
- When the customer has more than one case, you can select one, many, or all interactions from the source case and move them to an existing target case of the same customer.
- The state of the new case will be same as the source case.
- The subject for a case is based on the last interaction associated with the case. Therefore, after interactions are moved from one case to another, the subject of the latter case might change.

Ignite(Web) will automatically re-close a case in the following scenario:

1) Case A was auto-closed after being resolved for a long time.
2) Ignite automatically reopened Case A when a new email with the same case in the subject line was received.
3) Additional interactions may get associated with Case A (i.e. An agent may respond to that email).
4) An agent or supervisor may decide to move all the interactions that were associated with the case (case A) since it was closed to a new case (case B) or another existing case (case C).
5) Case A is auto-closed again.

To move interactions from one case to another case:

1) Click **Cases**.
2) From the list of cases, select the case that contains the interaction(s) you want to move.
3) In the **Interactions** tab, select the interaction from the list. Optionally, you can select multiple interactions from this list.
4) Click **Cut from Case** icon next to the interaction or hover over the interaction avatar and click the **Cut from Case** icon.

   *If you want to move multiple interactions, click the avatar and select many or all interactions, and click **Cut from Case** icon at the top.*
5) Paste the selected interactions to a new case or to an existing case:
   – To paste to a new case, click the **Paste to new case** button. A new case is created containing the interaction you moved there.

– To paste to an existing case (if there is one for this customer), click the **Paste to other case** button, and search and select the target case in the dialog box that displays.

NOTE:

– If you selected all interactions from a case to be moved, all the notes from the case are moved to the target case and the source case is deleted.

– If the selected interactions are not the only interactions for the source case, Ignite will display a list of notes that were created after the first interaction you want to cut, and you can decide which notes (if any) you want to cut and paste it into the target case.

6) Click **OK**.

Forwarding an interaction listed in a case

You can forward an interaction to others if you no longer wish to track the interaction.

To forward an interaction from a case

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.
   The details are displayed in the right pane.
3) Click the **Interactions** tab.
   Interactions related to the selected case are displayed.
4) In the **Interaction** tab, click **Forward** icon.
5) Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
6) Type the required content and click **Send**.

Participants

You can view the list of participants associated with each case. The participants list includes employees and external contacts.

NOTE: Participants list can also contain contact information derived from Active Directory. Active directory is only supported in single-tenant configuration.

To view the participants associated with a case

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.
   The details are displayed in the right pane.
3) Click the **Participants** tab to view the list of associated participants for the case.

In the **Participants** tab, you can do the following:

- Search for the participants associated with a case using the search field
- Edit external participants' contact information by clicking on the **Edit** icon. Note that you cannot edit employee or active directory records. For information on editing external contacts, see *"Contacts (WEB)"*.

- View all the cases that the participant is associated with by clicking on the **Case** icon. For information on viewing case information related to participants, see *"Contacts (WEB)"*.
- Associate or dissociate external contacts from cases by using the **Associate and the Dissociate** icons. For information on associating and dissociating external contacts from a case, see *"Associating or disassociating participants to a case"*.
- Merge external contacts by clicking on the **Merge** icon. For information on merging external contacts, see *"Merge External Contacts"*.

Associating or disassociating participants to a case

You can associate participants with a case if they are relevant to that case. If a participant's association with a case is incorrect, you can disassociate that participant from the case. An alert appears on the participant tab, when a participant is not associated to a call.

To associate a participant with a case

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.

   The details are displayed in the right pane.
3) In the **Participants** tab, click the **Associate Participant** icon.

   *The **Associate Participant** window is displayed.*
4) In the **Associate Participant** window, you can:
   - Search for an existing contact and associate the contact with the case—In the **Search** field, type the contact name. Under **Results**, hover over the contact avatar and click to select it and click **OK**.
   - Add a new contact and then associate that contact—Click the **Add Contact** icon. The **Create and Associate Contact** window is displayed. Enter the contact details and click **Save**.

   NOTE: When you create a contact in Ignite(WEB), you must add an extension to the phone number if multiple contacts share the same phone number.

   *The contact you associated with the case is listed in the **Participants** tab.*

To disassociate a participant from a case

1) Click **Cases** to display a list of cases.
2) Click the required case from the list.

   The details are displayed in the right pane.
3) In the **Participants** tab, click the **Dissociate** icon for the participant you want to dissociate.
4) Click **OK** to disassociate the participant from the case.

Associating or disassociating participants to a case

You can associate participants with a case if they are relevant to that case. If a participant's association with a case is incorrect, you can disassociate that participant from the case. An alert appears on the participant tab, when a participant is not associated to a call.

To associate a participant with a case

1) Click **Cases** to display a list of all cases.
2) Click the required case from the list.
   The details are displayed in the right pane.
3) In the **Participants** tab, click the **Associate Participant** icon.
   *The **Associate Participant** window is displayed.*
4) In the **Associate Participant** window, you can:
   – Search for an existing contact and associate the contact with the case—In the **Search** field, type the contact name. Under **Results**, hover over the contact avatar and click to select it and click **OK**.
   – Add a new contact and then associate that contact—Click the **Add Contact** icon. The **Create and Associate Contact** window is displayed. Enter the contact details and click **Save**.

   NOTE: When you create a contact in Ignite(WEB), you must add an extension to the phone number if multiple contacts share the same phone number.

   *The contact you associated with the case is listed in the **Participants** tab.*

To disassociate a participant from a case

1) Click **Cases** to display a list of cases.
2) Click the required case from the list.
   The details are displayed in the right pane.
3) In the **Participants** tab, click the **Dissociate** icon for the participant you want to dissociate.
4) Click **OK** to disassociate the participant from the case.

Other cases for this customer

The **Other cases for this customer** page lists other cases associated with this customer(s).You also can filter, search, view the status of the interactions, and move calls from a case to another case.

Contacts (WEB)

The Contacts button enables you to search for contacts and communicate with them by Voice, Email, Chat, or SMS.

Figure 23: Contacts button

Using the Contact button in Ignite, agents can search for employees who are configured in YourSite Explorer and Active Directory as well as contacts who have been added as customers. They can also search for queues. By default, when clicking the Contact button all contacts are available to be searched but agents can filter their search by Employees, Queues, Active Directory, and External.

NOTE: For an Active Directory contact to be displayed in a Web Ignite contact search, at least one of the following must be configured for the contact: email, phone number, or mobile phone number.

Contacts that you have often contacted are listed under **Contact History**. You can edit or delete a contact that is listed in Contact History. Hover over the contact avatar and click **Edit** to modify the contact information, or click the **X** button to remove the contact from Contact History.

Agents can view cases associated with a contact thus enable them to have an overview about the customer's calls before handling the customer issue.

For information on using Contacts, see *"Sending outbound emails"*, *"Sending outbound SMS contacts"*, or *"Making calls"*.

The following section explains how to

- Add new contact information
- Edit an existing contact information
- Import contacts from .CSV files
- View cases associated with a contact
- Merge Contacts

To add contact information

1) Click **Contacts**, and click **Add Contact**.
2) Provide all necessary information and click **Save**.

To edit an external contact information

1) Click **Contacts**. In the **Search** field, type the external contact name you want to edit. A list of contacts matching the search are displayed.
2) Hover over the contact avatar and click **Edit**, or click the contact and then click **Edit**.
3) In the **Edit Contact** window, under **Details** tab, modify contact information and click **Update**.

   *If history information is available for the selected contact. You can view information such as old phone numbers or old email addresses, are listed under **History** tab.*

   NOTE: Agents can also edit contact information during an interaction. For example, an agent in the Sales queue is on a call with a customer and updates the customer's email address or mobile number. The agent can now view the updated contact information and, if required, can transition to an alternate interaction type, such as email.

To import contacts from CSV file

1) Click **Contacts** and then click **Import Contacts**.
2) In the **Import Contacts** window, click **Browse** to select a .csv file and import all contacts from it.

   NOTE: .csv file contains a list of personal contacts in the "Name, Email, Phone number, Mobile number" format.

   For example: Jon Doe,jon.doe@email.com,6137109876,6137658765

   Scott Alan,scott.alan@express.com,,5879856541

   Jon Doe,,5096308945
3) Click **Import**.

Ignite confirms the import by displaying the following message "Contacts imported successfully".

NOTE: If the CSV file contains duplicate records, the system alerts you; based on the preferences set in the Customization page, the import action is either terminated or continued. Ignite confirms the import status by displaying a message; for example, "Process completed. 10 successful, 2 already exists, 3 unknown".

To view cases associated with a contact

1) Click **Contacts**. In the **Search** field, type the contact name you want. A list of contacts matching the search are displayed.
2) Hover over the contact avatar and click **Cases**.

   The Cases that the employee is associated to are displayed.

Merge External Contacts

As an agent or supervisor, you can manually merge two external contacts to clean up duplicate contacts.

For example, you can merge duplicate contacts with the following information:

CONTACT NAME	EMAIL	PHONE	EXTENSION	MOBILE PHONE
Juan		4556677999	333	9454345444
Juan Mata	Juan.matta@as.com	4556677999	334	;

After you merge two contacts, the resultant contact is as shown below:

CONTACT NAME	EMAIL	PHONE	EXTENSION	MOBILE PHONE
Juan Mata	Juan.matta@as.com	4556677999	334	9454345444

To merge external contacts

1) Click **Contacts**, and in the **Search** field, type the contact name.

   Ignite displays a list of contacts matching the search.
2) Under **Results**, hover over the source contact avatar and click **Merge**. Alternately, click the source contact and then click the **Merge** icon.

   *The **Merge Contacts** window is displayed with details for the selected source contact.*
3) In the **Merge Contacts** window, in the **Search** field, type the target contact name.

   Ignite displays the contact you have searched for.
4) Hover over the target contact avatar and click to select it and click **OK**.

*In the **Merge contacts** window, the source and target contact details are displayed.*

5) In the **Merge Contacts** window, from **Select Fields**, select the contact details you want to display in the merged contact. The selected details are displayed under **Result Contact**. A dialog box appears, displaying the message: “Are you sure you want to merge these contacts?”.
6) In the dialog box, click **OK** to merge the contacts.

   NOTE: When you merge external contacts, the changes are updated in cases and their associated calls.

Update contact information during a conversation

Agents can also edit contact information during an interaction. For example, an agent in the Sales queue is on a call with a customer and updates the customer’s email address or mobile number. The agent can now view the updated contact information and, if required, can transition to an alternate interaction type, such as email.

To update contact information during an interaction

1) Click **Contacts** and search for the applicable customer.
2) In the **Contacts** window, under **Contact Details**, click **Edit Contact**.

   *Optionally, you can hover over the avatar to view the **Edit** icon.*
3) In the **Edit Contact** window, update the contact details, and click **Update**.

   The handling icons are refreshed to reflect the updated details.

Merge External Contacts

As an agent or supervisor, you can manually merge two external contacts to clean up duplicate contacts.

For example, you can merge duplicate contacts with the following information:

CONTACT NAME	EMAIL	PHONE	EXTENSION	MOBILE PHONE
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   Ignite displays a list of contacts matching the search.

2) Under **Results**, hover over the source contact avatar and click **Merge**. Alternately, click the source contact and then click the **Merge** icon.

   *The **Merge Contacts** window is displayed with details for the selected source contact.*

3) In the **Merge Contacts** window, in the **Search** field, type the target contact name.

   Ignite displays the contact you have searched for.

4) Hover over the target contact avatar and click to select it and click **OK**.

   *In the **Merge contacts** window, the source and target contact details are displayed.*

5) In the **Merge Contacts** window, from **Select Fields**, select the contact details you want to display in the merged contact. The selected details are displayed under **Result Contact**. A dialog box appears, displaying the message: "Are you sure you want to merge these contacts?".

6) In the dialog box, click **OK** to merge the contacts.

   NOTE: When you merge external contacts, the changes are updated in cases and their associated calls.

MiCollab and Ignite integration (DESKTOP)

NOTE: The MiCollab and Ignite integration described in this section only applies to Ignite (DESKTOP). Ignite (WEB) integrates with MiCollab for inbound and outbound call handling and supports supervised transfers and conferences from MiCollab Client. Users requiring the full range of MiCollab and Ignite integration features are recommended to use Desktop Ignite.

Ignite is a flexible, intuitive, and efficient tool for handling email, chat, and SMS interactions and for performing basic call handling. Ignite enables agents to handle multiple interactions simultaneously, see the agent groups of which they are members, receive screen pop notifications of incoming interactions, set Account Codes and Classification Codes, view personal performance statistics and those of the queues and queue groups for which they answer, affect personal state indicators, and be advised of the presence of other agents in their agent group(s).

In this integration, Ignite can be used for basic call handling. (See *"Handling calls in Ignite"*.) More sophisticated scenarios, such as supervised transfers and conferencing, require iCollab Client.Depending upon your gateway, you can deploy and integrate iCollab with Ignite. In this integration, Ignite can be used for call handling, but more sophisticated scenarios, such as Supervised Transfer or Conferencing, MiCollab Client is recommended. For instructions related to the voice handling abilities of the iCollab Client application, refer to the MiCollab Client documentation available on Mitel Online or via the Webhelp within the iCollab Client. For information on which gateways support iCollab , see the MiContact Center Business System Engineering Guide .

The MiCollab Client and Ignite integration offers Enterprise presence (Non ACD) and extended ACD presence indicators, informing co-workers of your real-time availability.

Contact Center Client is used as a supervisory tool in this integration, enabling real-time monitoring and alarming, forecasting, data mining, agent and ACD queue control, abandoned caller callbacks, and efficient call handling by moving items from busy to less active queues.

NOTE: MiCollab cannot initiate Silent Monitor or Whisper Coach. For this feature supervisors require either PhoneSet Manager, Contact Center Softphone, or a hard set Contact Center Client.

This chapter describes voice handling using Ignite and MiCollab Client. For information regarding handling email, chat, SMS, and open media interactions using Ignite, see the *Multimedia Contact Center Installation and Deployment Guide* *"Ignite"*.

For installation and configuration details, see the MiContact Center Business Installation and Administration Guide.

MiCollab and Ignite integration (WEB)

The MiCollab and Ignite integration described in this section only applies to Ignite (WEB). Ignite (WEB) integrates with MiCollab for inbound and outbound call handling and supports supervised transfers and conferences from MiCollab Client.

Ignite is a flexible, intuitive, and efficient tool for handling email, chat, and SMS interactions and for performing basic call handling. Ignite enables agents to handle multiple interactions simultaneously, see the agent groups of which they are members, receive screen pop notifications of incoming interactions, set Account Codes and Classification Codes, view personal performance statistics and those of the queues and queue groups for which they answer, affect personal state indicators, and be advised of the presence of other agents in their agent group(s).

In this integration, Ignite can be used for basic call handling. (See *"Handling calls in Ignite"*.) More sophisticated scenarios, such as supervised transfers and conferencing, require iCollab Client.Depending upon your gateway, you can deploy and integrate iCollab with Ignite. In this integration, Ignite can be used for call handling, but more sophisticated scenarios, such as Supervised Transfer or Conferencing, MiCollab Client is recommended. For instructions related to the voice handling abilities of the iCollab Client application, refer to the MiCollab Client documentation available on Mitel Online or via the Webhelp within the iCollab Client. For information on which gateways support iCollab , see the MiContact Center Business System Engineering Guide .

Contact Center Client is used as a supervisory tool in this integration, enabling real-time monitoring and alarming, forecasting, data mining, agent and ACD queue control, abandoned caller callbacks, and efficient call handling by moving items from busy to less active queues.

MiCollab cannot initiate Silent Monitor or Whisper Coach. For this feature supervisors require either PhoneSet Manager, Contact Center Softphone, or a hard setContact Center Client.

This chapter describes voice handling using Ignite and MiCollab Client. For information regarding handling email, chat, SMS, and open mediainteractions using Ignite, see the Multimedia Contact Center Installation and Deployment Guide *"Ignite"*.

For installation and configuration details, see the *MiContact Center Business Installation and Administration Guide*.

MiCollab Basic and Ignite integration (DESKTOP)

There are some features described in this chapter that do not apply for customers running the MiCollab Basic application. Refer to the following list of exceptions:

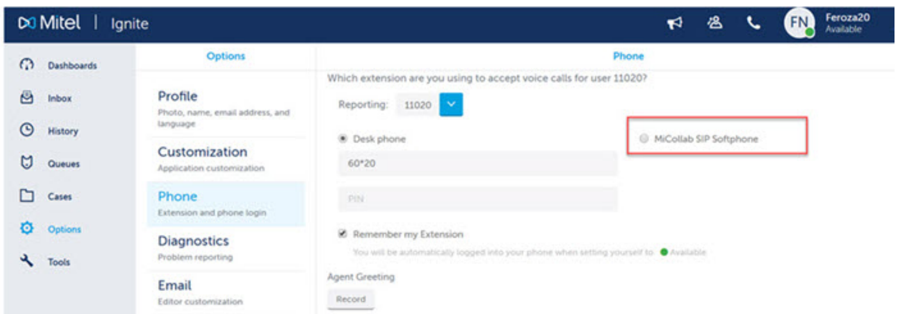
- Agents must use their deskphone for hot desking and cannot hot desk log in from MiCollab Client.

- Instant messaging is not supported.
- Extended ACD presence is not supported.

MiCollab Client and Ignite user interface (DESKTOP)

Ignite, when started, automatically docks to the MiCollab Client application, creating one client interface for voice and multimedia. (See the following figure.)

Figure 24: MiCollab Client and Ignite integration



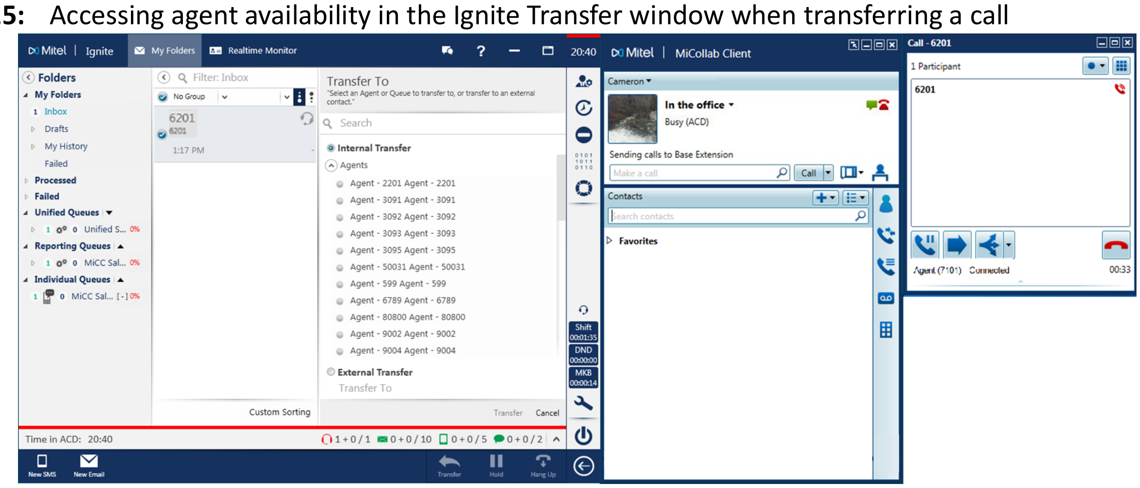
The MiCollab Client and Ignite integration offers you the flexibility to access as much or as little of the interface as needed in order to optimize desktop real estate.

For example, you can choose to collapse the main Ignite window and only access the Ignite Sidebar and MiCollab Client (recommended for voice-only agents) or expand the Ignite panes if you will also handle non-voice media. If you are transferring a call, it is beneficial to check recipient agent availability before transferring. (See the following figure.)

Given enough space on the screen, MiCollab Client automatically docks to the right of the Ignite window. If there is not enough space to the right, MiCollab Client docks to the left of the Ignite window. If the agent repositions the MiCollab Client on the desktop, Ignite will automatically re-dock to MiCollab Client in its new position.

You can minimize and restore the iCollab Client and Ignite applications independently or together. When both windows are full size, you can minimize the individual application. When the Ignite window is collapsed, minimizing the MiCollab Client window also minimizes Ignite.

Figure 25: Accessing agent availability in the Ignite Transfer window when transferring a call



Handling voice Interactions with the MiCollab Client and Ignite integration

The following table lists agent actions and the application in which they are performed.

Table 12: Agent actions by application (Sheet 1 of 2)

Agent action	MiCollab Client	Ignite (DESKTOP)	Ignite (WEB)
Voice ACD log on and log off	Yes	Yes	Yes
Set or remove Make Busy with Reason Code		Yes	Yes
Set or remove Do Not Disturb with Reason Code		Yes	Yes
Cancel Work Timer		Yes	Yes
Chat (IM)	Yes		
Join/Leave Agent Group		Yes	Yes
Answer	Yes	Yes	Yes
Auto Answer *	Yes		Yes
Hang Up	Yes	Yes	Yes
Conference	Yes		Yes
Merge			
Cancel	Yes		Yes
Account Code		Yes	Yes
Classification Code		Yes	Yes
Call me back	Yes		
Call forwarding	Yes		
Camp on	Yes		
Forward	Yes		
Leave a message	Yes		
Mute	Yes		
Retrieve	Yes		Yes

Table 12: Agent actions by application (Continued) (Sheet 2 of 2)

Agent action	MiCollab Client	Ignite (DESKTOP)	Ignite (WEB)
Split	Yes		
Silent Monitor	Yes		
Transfer (blind)	Yes	Yes	Yes
Transfer (supervised)	Yes		Yes
Transfer/Conf	Yes		Yes
Volume	Yes		
Dial Pad	Yes		Yes
Dial Contacts	Yes		Yes
ACD Hot desk login	x (with Mi Voice Business 6.0 SP3+) and with SIP		Yes

*For the auto answer feature to work for an agent using a deskphone, the deskphone must have an auto answer key appearance set and auto answer must be enabled in the agent's Class of Service. For an agent using a MiCollab softphone, auto answer must be enabled using the MiTAI browser.

The following features continue to be available in Contact Center Client (Contact Center Softphone or Contact Center PhoneSet Manager) but are not currently supported in the MiCollab Client and Ignite integration:

- Whisper Coach
- Custom ring tones
- Speed Dial
- Call notes
- External Hot Desking Agents

If these features are necessary to your business, you can continue to use Contact Center Softphone or Contact Center PhoneSet Manager but these applications do not support an integration with Ignite.

Agent state indicators

MiCollab Client displays Enterprise presence (Non ACD) and extended ACD presence.

Extended ACD presence displays in MiCollab Client for all agents who are members of the same agent group(s) as the logged in employee. These states are:

- Logged out
- Not available for ACD (not present in any agent groups)
- Available for ACD (logged in and idle)
- Busy <reason> (logged in and busy)

  - Busy – Outbound (making an outbound call)
  - Busy – ACD (receiving an ACD call)
  - Busy <Make Busy reason code name> (in MKB, including system MKB)
  - Busy – Non-ACD (receiving a Non ACD call, such as a consultation call (pre-transfer) or a direct call to their agent DN)
- Do Not Disturb - <DND reason code name> (logged in and in DND)
- Unknown – this indicator may display following an MiContact Center Enterprise Service restart

Agent state indicators enable you to determine agent availability and display in both MiCollab Client and Ignite. When transferring calls, you can check the agent state indicator to see if the receiving agent is available before completing the transfer.

NOTE: Ignite may remove voice agent presence if communication between the MiCollab Client and the MiCollab Client Server is lost. If this occurs, agents must manually reset presence once communication is restored.

Ignite displays the agent's overriding state and the time spent in that state. If the length of time exceeds 24 hours, Ignite displays by days:hours:minutes:seconds. See *"Getting started with Ignite (DESKTOP)"* for an example of the Ignite Sidebar interface.

Agent overriding states, and their associated colors, include:

- Ringing (Red)
- ACD (Red)
- ACD Hold (Red)
- Non-ACD/Outbound (Blue)
- Work Timer (Yellow)
- DND (Red)
- Make Busy (Yellow)
- Not present in any agent group (Yellow)
- Idle (Green)
- Unknown (Gray)
- Logged out (Gray)

MiCollab Client

Voice handling instructions for MiCollab Client are described in the MiCollab Client documentation available on Mitel Online or via the Web help within the MiCollab Client.

Logging into MiCollab Client

If you start Ignite before logging into MiCollab Client, you will be prompted to register and log in your voice agents in MiCollab Client before signing into Ignite. We recommend you start and log into MiCollab Client before starting and logging into Ignite.

To log into MiCollab Client as a Hot Desking Agent

1) Right click on the **Agent** in the **Active Calls** window.
2) Select **Hot-Desk In**.

   A new dialog window opens.
3) In the **Base DN** text box, enter your base extension.
4) If your business uses PINs, enter your PIN.
5) Click **Hot-Desk In**. Your hot desk agent is now logged in and your base extension is out of service.

   NOTE: By default, Ignite is configured to detect voice agent logout. If you are running Ignite and you exit MiCollab Client, your employee and all associated agents are signed out of Ignite.

Options (WEB)

The Options page enables you to customize your Ignite profile, set Ignite defaults, configure your extension, customize your email editor, and report performance issues. For more information, see *"Your Ignite profile (WEB)"*, *"Set email editor options"*, *"Reporting performance issues in Ignite (WEB)"*, *"Agent greeting settings (WEB)"*, and *"Recording agent greetings (WEB)"*. When you click the Record button to create a recording, the system's Record Agent Greeting workflow is triggered. The Record Agent Greeting workflow instructs the system to call the dialed number and prompts you to record and save a greeting.

Agent greeting settings (WEB)

The Agent Greeting feature enables agents to record messages (as .wav files) that play automatically to callers when the agent answers an inbound ACD call. The greeting can provide a consistent experience for each caller and free the agent from having to repeat the same introductory phrase for every call.

Web Ignite allows the agents to record a single default agent greeting that can be assigned on all queues. The agent greeting is a two-way playback, where both the caller and the agent hear the recording.

Agents record and manage their default greeting on the **Options > Phone** page.

NOTE:

- When the agent greeting is playing, the caller is able to hear the agent speaking. To prevent the caller from hearing the agent or other contact center background noise during the agent greeting, mute the agent's headset for the duration of the greeting.
- Administrative settings determine whether you have access to Agent greeting functionality. If your contact center is not enabled for agent greetings, the Agent Greeting options will not display in Ignite.

Recording agent greetings (WEB)

When you click the Record button to create a recording, the system's Record Agent Greeting workflow is triggered. The Record Agent Greeting workflow instructs the system to call your DN and prompts you to record and save a greeting.

NOTE: When recording messages, your voice agent is in a Non ACD state, and is not offered calls from any incoming queues.

To record your first agent greeting

1) Under the **Options > Phone**, click the **Record** button. The Record Agent Greeting workflow is triggered and instructs the system to call your DN.
2) Answer the incoming call and follow the system prompts to record and save your greeting. After you have finished recording, you can see the **Click when finished recording** button under **Agent Greeting** section.
3) Press the **Click when finished recording** button.

   *Under **Agent Greeting** section, **Record** and **Play** buttons are now visible. You can click the **Play** button to verify the agent greeting using your computer's speakers. To re-record the agent greeting, click **Record**.*
4) To disable your agent greeting, use the slider option under **Agent Greeting** section.

To record your first agent greeting

1) Go to, **Options** > **Phone**, click **Record**.
2) Answer the incoming call and follow the system prompts to record and save the greeting. Recording is initiated and **Recording in Progress** text is displayed, after the recording is complete the system will save the recording.
3) Go to **Agent Greeting** and click **Play** to verify the agent greeting. To re-record the agent greeting, click **Record**.
4) To disable your agent greeting, use the slider option under **Agent Greeting** section.

NOTE: Internet Explorer does not support .wav file playback. While using the Agent Recording feature, for playback of your recording, use any of the browsers supported by MiContact Center Business.

Set email editor options

You can customize the email editor in Ignite.

To set the email editor

1) Click **Options > Email** to view options.
2) Set the options. Available options:
   - **Mobile view**—If this option is enabled, the email editor is optimized for the hand-held device and the text formatting icons are not displayed.
   - **Use last reply template folder location**—If this option is enabled and when you browse for a reply template, you can directly access the folder location where the last used reply template is stored.
   - **Quick reply templates**—If this option is enabled, you can access and apply an existing template when replying to emails.
   - **Clear Quick reply templates view after Insert**—If this option is enabled, the quick reply templates view will be cleared after you have inserted the template.
   - **Expand Headers**—If this option is disabled, all the header fields are collapsed except the top-level header. To expand or collapse the header fields, click the down arrow or up arrow buttons.
3) Click **Save**.

Your Ignite profile (WEB)

Ignite provides each user with a profile, associated to the username used to log into Ignite. You can adjust several of the profile's default settings to customize your Ignite experience.

Ignite remembers your changes to the following elements:

- History
- Favorited queues
- Dashboard
- Default landing page
- Phone settings, including Extension, PIN, and automatic login to your phone
- Automated diagnostics reporting
- Filter selection preference

You cannot delete your profile; however you can reset the above to Ignite’s default settings.

The following procedures explain how to:

- Set an avatar image
- Clear or change your avatar image
- Specify your language preference
- Set Ignite's default landing page
- Configure notification display duration
- Configure phone settings, including Extension, PIN, and automatic log-in to the phone
- Enable automated diagnostics reporting from Ignite
- Reset your profile to Ignite’s default settings

To set an avatar image

1) Click **Options > Profile**.
2) Click **Change Photo**.
3) Under **Upload**, click to upload a photo or drag-and-drop a photo to the space provided.
4) Click **Save**.

To clear or change your avatar image

1) Click **Options > Profile**.
2) Click **Change Photo** and select **Clear**.
3) To change the image, follow the steps in ‘To set an avatar image’ above.

To specify your language preference

1) Click **Options > Profile**.
2) After **Language**, select a language from the drop-down.
3) Click **Save**.

To set Ignite's default landing page

1) Click **Options > Customization**.
2) Under **Default landing page**, select a page from the drop-down.
3) Click **Save**.

To configure the notification duration (in seconds)

An agent can configure the durations (in seconds) for the following notifications: new interactions, follow up, and info/error messages displayed on the Ignite screen.

To configure Notification display duration

1) Click **Options > Customization** to view the options.
2) Under **Notification Settings**, set the **Interaction toaster display time (seconds)** in the range 5 - 60 seconds; default value is 5 seconds.
3) Under **Notification Settings**, set the **Follow up toaster display time (seconds)** in the range 5 - 60 seconds; default value is 10 seconds.
4) Under **Notification Settings**, set the **Info/ error toaster display time (seconds)** in the range 5 - 60 seconds; default value is 5 seconds.
5) Click **Save**.

NOTE: Notification durations can also be reset in Reset Application Options.

To configure phone settings

NOTE: These settings enable login to your phone from Ignite. This feature is supported for hot desk and external hot desk agents only.

1) Click **Options > Phone**.
2) Specify your **Extension** and, if applicable, **PIN**.
3) To be logged into your phone after making yourself Available, select the **Automatic login** checkbox.
4) Click **Save**.

   The next time you sign into Ignite and set your state to Available, you will be logged into your phone.

To enable automated diagnostics reporting from Ignite

NOTE: You can send on-demand reports in addition to automated reporting. See *"Reporting performance issues in Ignite (WEB)"*.

1) Click **Options > Diagnostics**.
2) Under **Continuously send diagnostics information**, toggle the switch to blue.

To reset your profile to Ignite's default settings

1) Click **Options > Customization**.
2) Under **Factory reset**, click **Reset Application Options**.
3) When prompted, click **Reset**.

NOTE: Resetting your profile to Ignite's default settings resets the **Clear quick reply templates view after insert** option.

Filter selection preference (WEB)

You can configure filter selection behavior and enable selection of multiple filters at a time. This setting applies to the History, Case, Case interactions and Contacts tabs in Ignite (WEB).

To set the multi-select filter option

1) Click **Options > Customization** to view options.
2) Set the ‘**Allow filter multiselect**’ option.
3) Click **Save**.

Reporting performance issues in Ignite (WEB)

You can report performance issues in Ignite on-demand, to be reviewed by a supervisor or system administrator. Reports include log lines from your browser and any details you enter.

On-demand reports are sent in addition to Ignite's automated diagnostics reporting. For information on enabling automated diagnostics reporting, see *"Your Ignite profile (WEB)"*.

Supervisors looking to access diagnostics reports should consult *"Accessing diagnostics reports from Ignite (WEB)"*.

To report a performance issue in Ignite

1) Click **Options > Diagnostics**.
2) In the field provided, describe the issue experienced.
3) Click **Send**.

Agent greeting settings (WEB)

The Agent Greeting feature enables agents to record messages (as .wav files) that play automatically to callers when the agent answers an inbound ACD call. The greeting can provide a consistent experience for each caller and free the agent from having to repeat the same introductory phrase for every call.

Web Ignite allows the agents to record a single default agent greeting that can be assigned on all queues. The agent greeting is a two-way playback, where both the caller and the agent hear the recording.

Agents record and manage their default greeting on the **Options > Phone** page.

NOTE:

- When the agent greeting is playing, the caller is able to hear the agent speaking. To prevent the caller from hearing the agent or other contact center background noise during the agent greeting, mute the agent's headset for the duration of the greeting.
- Administrative settings determine whether you have access to Agent greeting functionality. If your contact center is not enabled for agent greetings, the Agent Greeting options will not display in Ignite.

Recording agent greetings (WEB)

When you click the Record button to create a recording, the system's Record Agent Greeting workflow is triggered. The Record Agent Greeting workflow instructs the system to call your DN and prompts you to record and save a greeting.

NOTE: When recording messages, your voice agent is in a Non ACD state, and is not offered calls from any incoming queues.

To record your first agent greeting

1) Go to, **Options** > **Phone**, click **Record**.
2) Answer the incoming call and follow the system prompts to record and save the greeting. Recording is initiated and **Recording in Progress** text is displayed, after the recording is complete the system will save the recording.
3) Go to **Agent Greeting** and click **Play** to verify the agent greeting. To re-record the agent greeting, click **Record**.
4) To disable your agent greeting, use the slider option under **Agent Greeting** section.

NOTE: Internet Explorer does not support .wav file playback. While using the Agent Recording feature, for playback of your recording, use any of the browsers supported by MiContact Center Business.

Set email editor options

You can customize the email editor in Ignite.

To set the email editor

1) Click **Options > Email** to view options.
2) Set the options. Available options:
   - **Mobile view**—If this option is enabled, the email editor is optimized for the hand-held device and the text formatting icons are not displayed.
   - **Use last reply template folder location**—If this option is enabled and when you browse for a reply template, you can directly access the folder location where the last used reply template is stored.
   - **Quick reply templates**—If this option is enabled, you can access and apply an existing template when replying to emails.
   - **Clear Quick reply templates view after Insert**—If this option is enabled, the quick reply templates view will be cleared after you have inserted the template.
   - **Expand Headers**—If this option is disabled, all the header fields are collapsed except the top-level header. To expand or collapse the header fields, click the down arrow or up arrow buttons.
3) Click **Save**.

Configuring Ignite (WEB) dashboards

Real-time monitoring of employees, agents, queues, and callback requests is available via the dash-boards in Ignite (WEB). You can create multiple dashboards, customize the widgets that display in each, and give them meaningful names to indicate their purpose.

NOTE: The real-time monitors in Ignite (WEB) are known as ‘widgets’ in the dashboard user interface.

Adding and configuring dashboards

Upon first use of Ignite (WEB), a default dashboard is created, containing the Employee State widget only. You can rename this dashboard and include additional widgets to display.

See *"Accessing real-time information with Ignite (WEB)"* for information on how to use the real-time monitors.

To access the dashboards

1) In Ignite (WEB), click **Dashboards**.
2) Click the down arrow to see a list of dashboards, with the number of widgets you have added for each one

   NOTE: If this is your first use of Ignite (WEB), only the Default Dashboard will display.
3) Open a dashboard by selecting it from the list.

To create a new dashboard

1) Click **Dashboards**.
2) Click the **Add Dashboard** button.
3) Click **Save**.

To modify a dashboard's title and display format

1) In a dashboard, click the **Edit Dashboard** button.
2) Click **Options**.
3) Optionally, rename the dashboard by entering text in the field under **Title**.
4) Optionally, reorganize the template by selecting from the choices under **Layout**.
5) Click **Close**.
6) Optionally, click **Undo** to revert changes or click **Save** to accept changes.

To delete a dashboard

1) In the dashboard you want to delete, click the **Delete Dashboard** button.

   NOTE: The dashboard you want to delete must be one that was previously saved. If not, then you must save it first before deleting.
2) Click **Delete** to delete the dashboard or click **Cancel** to retain the dashboard.

Adding and configuring dashboard widgets

The following widgets can be added to dashboards:

- **Employee State**—Displays employee presence and shift information
- **Callback Requests**—Displays a list of callback requests
- **Queue Now**—Displays queue and queue group statistics
- **Agent State**— Displays agents organized by time spent in the following states: ACD, Idle, Non-ACD, Unavailable, Not Present, and Offline
- **Web Browser**— Displays the website content that is embedded in the widget

To add widgets to a dashboard

1) In a dashboard, click **Add Widget**.
2) Select the widget you want to add to the dashboard.
3) Repeat steps 1-2 to select additional widgets if desired.
4) Click **Save**.
5) If you want to add more widgets after saving, select the dashboard to which you want to add widgets and click the **Edit Dashboard** button.

When a dashboard is in edit mode, you can edit the content within widgets, collapse widgets, change the widgets' location on the dashboard, or remove widgets from the dashboard.

NOTE: When you are editing a Web Ignite Dashboard that includes a Web Browser widget you will not see the webpage in the widget while in edit mode.

NOTE: You can collapse or expand the widget at any time (you do not have to be in edit mode).

The following procedure describes the editable features that are common to all widgets.

To modify a widget (common procedures)

1) In the dashboard, click the **Edit Dashboard** button.
2) In the widget toolbar:
   – Click the **Settings** button to edit the content within the widget (see the relevant procedures for each widget for specific details).
   – Click the **Collapse** button to collapse the widget or the **Expand** button to expand the widget.
   – Select the **Move** button to drag and drop the widget to a different position on the dashboard.
   – Click the **Delete** button to remove the widget from the dashboard.
3) If you edited the content within the widget, click **Apply**.
4) Click **Save** to save the changes to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Employee State widget

When you configure options in the Employee State widget, you optionally change the name of the monitor and add an employee to be monitored.

To configure options in the Employee State widget

1) In the dashboard, click the **Edit Dashboard** button.
2) In the Employee State widget, click the **Settings** button.
3) Optionally, under **Title**, type a new name for the monitor.
4) Under **Employees**, either select from the displayed list or type the employee ID in the search field to find the employee you want to monitor.
5) Click **Apply**.
6) Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Callback Requests widget

The only option available to be configured in the Callback Requests widget is the monitor name.

When you configure options in the Callback Requests widget, you can change the name of the monitor and add or remove the device to be monitored.

To rename the Callback Requests widget

1) In the dashboard, click the **Edit Dashboard** button.
2) In the Callback Requests widget, click the **Settings** button.
3) Under **Title**, type a new name for the monitor.
4) Click **Apply**.
5) Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Queue Now widget

When you configure options in the Queue Now widget, you can change the name of the monitor and add or remove the device to be monitored.

To configure options in the Queue Now widget

1) In the dashboard, click the **Edit Dashboard** button.
2) In the Queue Now widget, click the **Settings** button.
3) Optionally, under **Title**, type a new name for the monitor.
4) Click the drop-down beside **Queue** and select either **Queue** or **Queue Group**.
5) Optionally, enter text into the **Search** field to search for queues or queue groups.
6) Select the check box beside each queue or queue group you want to monitor, or select the check box beside **ID** to select all queues or queue groups.
7) Click **Apply**.
8) Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Agent State widget

When you configure options in the Agent State monitor, you can change the name of the monitor and add or remove the device to be monitored.

To configure options in the Agent State widget

1) In the dashboard, click the **Edit Dashboard** button.
2) In the Agent State widget, click the **Settings** button.
3) Optionally, under **Title**, type a new name for the monitor.
4) Optionally, type content into the **Search** text box to filter the agents that display in the list.
5) Select the check box beside each agent you want to monitor, or select the check box beside each media icon to select all agents who are configured to handle that media type.

   NOTE: You can optionally select multiple voice agents for each employee, if applicable, by selecting the check boxes located under the voice (telephone) icon, beside the employee name.
6) Click **Apply**.
7) Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Web Browser widget

When you configure options in the Web Browser widget, you optionally change the name of the widget, the height of the widget, and URL of the website you want to display.

To configure options in the Web Browser widget

1) In the dashboard, click the **Edit Dashboard** button.
2) In the **Web Browser** widget, click the **Settings** button.
3) Optionally, under **Title**, type a new name for the web browser.
4) In **URL** field, enter the URL of the website you want to display.
5) Optionally, enter the height of the widget in the range 50—5000.
6) Click **Apply**.
7) Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

NOTE: When you are editing a Web Ignite Dashboard that includes a Web Browser widget you will not see the webpage in the widget while in edit mode.

Searching Ignite

You can search Ignite to view interactions. Please note the following.

Agents may only search interactions sent to queues for which the agents answer.

DESKTOP - Employees licensed as Advanced supervisors or System Administrators may search Ignite's entire repository. This includes Ignite's In Progress folder (DESKTOP), which enables supervisors to see interactions currently in agent Inboxes. This search capability does not require Multimedia Contact Center licensing. However, to view and search interactions in queue using Ignite, employees must have a Multimedia Contact Center license and multimedia agents assigned to the queue.

WEB - Agents may only search interactions sent to queues for which the agents answer. Employees licensed as Advanced supervisors or System Administrators may search all interactions in the History tab of Ignite (WEB). This search capability does not require the supervisor be licensed to handle multimedia.

Time stamps on interactions reflect the Ignite client time. To search interactions by date or time, use the date or time for the Ignite client.

Interactions that are removed from the queue are removed from queue folder search results.

New interactions in queue matching search criteria will not be displayed until the search is executed again.

DESKTOP - You cannot search for voice interactions, but you can filter voice interactions to view them selectively. See "Choosing how interaction data displays in the Card view (DESKTOP)" on page 315, and "Choosing how interaction data displays in the Grid view (DESKTOP)" on page 316 for more information.

WEB - You can search for voice interactions in Ignite Web version 9.1.

The following procedures explain how to

- Perform keyword searches of Ignite's folders
- Search Ignite using search filters

Performing keyword searches

DESKTOP - Performing keyword searches of Ignite's folders enables you to search for interactions.

WEB - You can perform a keyword search for either historical interactions or interactions in queue.

To perform keyword searches of Ignite's folders (DESKTOP)

1) From the Folders pane, select a folder. If necessary, expand the **My Folders**, **Processed**, **Unified Queues**, **Reporting Queues**, or **Individual Queues** folder.
2) In the **Search** or **Filter** field, type keywords over the ghost text.

NOTE: To display more search results, click **Show more results …**.

3) To clear searches, click the **x** button.

To perform keyword searches for historical interactions in Ignite (WEB)

1) Click **History**.
2) Optionally, select a **Filter**.
3) Optionally, select **Only show my items**.
4) In the **Search interactions** field, type the keyword(s). To clear search texts, click **Clear**.

To perform advanced searches for historical interactions in Ignite (WEB)

1) In the **Search interactions** field, click **Advanced Search**.

   Use the following search criteria in any combination to search for historical interactions.

   – **Media**—Select the media type you want
   – **Date**—Select a date and a date range
   – **Interaction Id**—Type the interaction id you want
   – **Case**—Type the case details as search keywords
   – **Queue**—Type the queue name, the system displays a predictive list of results based on the letters you type, and select the record
   – **Employee**—Type the employee name, the system displays a predictive list of results based on the letters you type, and select the record

2) Click **Search**. To clear searches, click **Reset**.

To perform keyword searches for interactions in queue in Ignite (WEB)

1) Click **Queues** and select a queue or queue group.
2) In the **Search interactions** field, type the search text. To clear search texts, click **Clear**.

To perform advanced searches for in queue interactions in Ignite (WEB)

1) Click **Queues** and select a queue or queue group
2) In the **Search interactions** field, click **Advanced Search**.

   Use the following search criteria in any combination to search for in queue interactions.

   – **Media**—Select the media type you want
   – **Date**—Select a date and a date range
   – **Interaction Id**—Type the interaction id you want

– **Case**—Type the case details as search keywords
– **Queue**—Type the queue name, the system displays a predictive list of results based on the letters you type, and select the record
– **Employee**—Type the employee name, the system displays a predictive list of results based on the letters you type, and select the record

3) Click **Search**. To clear searches, click **Reset**.

Searching Ignite using search filters

Agents may only search interactions sent to queues for which the agents answer. Users can search Ignite's folders by entering filters into Ignite’s Search fields. Employees licensed as Advanced supervisors or System Administrators may search Ignite's entire repository.

DESKTOP - This includes Ignite's In Progress folder, which enables supervisors to see interactions currently in agent Inboxes. This search capability does not require Multimedia Contact Center licensing. However, to view and search interactions in queue using Ignite, employees must have a Multimedia Contact Center license and multimedia agents assigned to the queue.

If administrative configurations permit, selecting the search result previews them.

The following explains how to use filters to search Ignite. This information does not apply to voice interactions.

NOTE:

- Time stamps on interactions reflect the Ignite client time. To search interactions by date or time, use the date or time for the Ignite client.
- To display more search results, click 'Show more results….

Using the filters in the following table, you can perform the following searches in Ignite.

NOTE: DESKTOP - The following search filters cannot be applied to the Inbox.

Table 13: Ignite search filters (Sheet 1 of 4)

Filter	Explanation
No filter	Finds interactions containing a specific word E.g. order
AND	Finds interactions containing one word and another E.g. sales AND order
Space	Finds interactions containing one word and another E.g. sales order
;	Finds interactions containing one word and another E.g. sales;order
NOT	Finds interactions containing one word as long as they do not also contain another E.g. order NOT closed

Table 13: Ignite search filters (Continued) (Sheet 2 of 4)

Filter	Explanation
-	Finds interactions containing one word but not another E.g. order -closed
OR	Finds interactions containing either of the words specified E.g. sales OR order
Quotation marks	Finds interactions containing the exact phrase E.g. “sales order”
date	Finds interactions received on specific dates E.g. date:01/15/2014
Today	Finds interactions received today E.g. date:Today
Yesterday	Finds interactions received yesterday E.g. date:Yesterday
This week	Finds interactions received this week E.g. date:This week
This month	Finds interactions received this month E.g. date:This month
This year	Finds interactions received this year E.g. date:This year
Month name **NOTE:** Ignite will search the month by the current year, if no year is specified.	Finds interactions received on a specific month. You can also search by a specific date in the month. E.g. date:August, or date:August 2013, or date:August 18, or date: August 18 2013
Abbreviated month name	Finds interactions received on a specific month, by a three letter abbreviation E.g. date:Aug, or date:Aug 2013, or date:Aug 18, or date:Aug 18 2013
Day name	Finds interactions received on a specific day of the week E.g. date:Monday
> (for searches by date or attachment size)	Finds interactions by dates after the specified date or date keyword E.g. date:>August 18 2013, or date:>August, or date:>August 18 Find email interactions by attachments larger than the attachment size E.g. attachments:>200KB

Table 13: Ignite search filters (Continued) (Sheet 3 of 4)

Filter	Explanation
>= (for searches by date or attachment size)	Finds interactions by dates after or on the specified date or date keyword E.g. date:>=August 18 2013, or date:>August, or date:>=August 18 Finds email interactions by attachments larger than or equal to the attachment size E.g. attachments:>=200KB
< (for searches by date or attachment size)	Finds interactions by dates before the specified date or date keyword E.g. date:<August 18 2013, or date:<August, or date:<August 18 Finds email interactions by attachments smaller than the attachment size E.g. attachments:<200KB
<= (for searches by date or attachment size)	Finds interactions by dates before or on the specified date or date keyword E.g. date:<=August 18 2013, or date:<=August, or date<=August 18 Finds email interactions by attachments smaller than or equal to the attachment size E.g. attachments:<=200KB
AND or space (for searches by date)	Finds interactions received on two or more dates E.g date:Today AND Yesterday, or date:Today Yesterday
NOT or - (for searches by date)	Finds interactions received on one date but not another E.g. date:This month NOT Last week, or date:This month -Last week
OR (for searches by date)	Finds interactions received on either of the dates specified E.g. date:Today OR August 25
subject:	Finds interactions containing text by subject E.g. subject:sales AND order
from:	Finds interactions received from a specific sender. You can search by the sender's first name, last name, full name, or email address. E.g. from:Renee
to:	Finds interactions sent to a specific recipient. You can search by the recipient's first name, last name, full name, or email address. E.g. to:jane@gmail.com
cc:	Finds interactions cc'd to a specific recipient. You can search by the recipient's first name, last name, full name, or email address. E.g. cc:jane@email.com

Table 13: Ignite search filters (Continued) (Sheet 4 of 4)

Filter	Explanation
bcc:	Finds interactions bcc'd to a specific recipient. You can search by the recipient's first name, last name, full name, or email address. E.g. bcc:jane@gmail.com
case:	Finds interactions tagged with a specific case ID E.g. case:kxPKez
ticket:	Finds interactions tagged with a specific ticket number E.g. ticket:pAsMDc
media:	Finds interactions of a specific media type E.g. media:email
agent:	Finds interactions last handled by a specific agent. You can search by the agent's first name, last name, full name, or by reporting number. E.g. agent:Renee or agent:1000
queue:	Finds interactions last sent to a specific queue E.g. queue:sales
attachments:	Finds email interactions by attachment. You can search by attachment name, size, content, or type. E.g. attachments:docx or attachments:<200KB **NOTE:** If no size unit is specified, the default search unit is bytes.

You can perform the following types of searches in Ignite:

General searches – Any keywords can be typed in the search field, and the search returns interactions containing the keywords.

For example, if an agent types 'sales order' in the Filter field, Ignite searches for interactions in the selected folder containing the terms sales and order.

In the Inbox, the History, and the Queues pages, while you type the search keywords in the Queue box, the system displays a predictive list of results based on the letters you type.

For example, if an agent types 'a' letter in the Queue box, Ignite (Web) displays any queue names that contain 'a' (i.e. chat_queue12, email_queue33) as a predictive list of results.

Targeted searches – You can limit searches to fields and folders by inserting a colon between the field and the search term.

For example, an agent searching interactions' Subject fields for the word 'order' can type 'subject:order'. In this example, Ignite searches the 'Subject' fields of interactions in the selected folder for the term 'order'.

Multiple targeted searches – You can limit searches to more than one field using semi-colons.

For example, an agent searching for an order placed by a specific customer can type 'subject:order;from:Renee'. Ignite interprets this as (Subject contains Order) AND (From contains Renee). In this example, the program searches the Subject fields of contacts to find orders from Renee.

NOTE:

- If at least one of the filters ends with ':', you must separate all filters with ";". For example, 'from:Renee;date:yesterday'.
- If at least one of the filters ends with ':', you cannot use 'NOT', '-', and 'OR' between the filters. For example, typing 'order:Renee OR from:Tom to retrieve orders placed by either Renee or Tom is invalid. Typing 'order;from:Renee OR from:Tom' is valid and will retrieve orders placed by either Renee or Tom.

Complex targeted searches – You can perform complex searches to further narrow results returned.

For example, an agent searching for a completed order, placed by a specific customer, can type 'completed;subject:sales order;from:Renee'. Ignite interprets this as: Completed AND (Subject = (Sales AND Order)) AND (From contains Renee). In this example, Ignite searches the Subject fields of contacts for completed sales orders placed by Renee.

Email attachment size searches - You can search emails by attachment size. Searches by bytes ('b'), kilobytes ('KB'), and megabytes ('MB') are supported. If no size unit is specified, the default search unit is bytes. If searching for attachments by size, specifying "attachments.size:" in your query returns results more efficiently.

Routing models in Multimedia Contact Center

Push, Pick, and Mixed routing models determine how agents receive interactions in queue. Note that administrative configurations determine the routing models that your contact center uses and that the routing model can vary by queue. For more information, consult your supervisor or system administrator.

NOTE: Push, Pick, and Mixed routing models determine how agents receive email and chat interactions in queue. Delivery of voice interactions is determined by programming on the 3300 ICP. For more information, contact your supervisor or system administrator.

Push model

In Push model interactions in queue are sent to an available agent's Inbox. The number of interactions that can be pushed to an agent's Inbox at one time depends on the agent's Workload, as configured in the system, and can vary by media type. For example, the system may be permitted to push five emails at a time to an agent's Inbox but only two chats.

Interactions are also pushed to agents on the basis of Agent Skills (as configured in the system), Queue Priority, and Preferred Agent. A Preferred Agent is one who is engaging in an ongoing interaction with a customer.

With the exception of transferred interactions, agents do not receive items in their Inbox if the Inbox contains ringing interactions of the same media type.

Picking interactions out of queue is permitted in a Push model.

Pick model

In Pick model agents pick interactions out of queue exclusively. Agents in Do Not Disturb cannot pick interactions out of queue.

Mixed model

In Mixed model agents pick interactions out of queue, but items sitting in queue past a set time are pushed to agents' Inboxes. Workload determines the number and type of media interactions that can be pushed to an agent at any one time. For more details, see 'Push model', above.

With the exception of transferred interactions, agents do not receive items in their Inbox if the Inbox contains ringing interactions of the same media type.

Receiving notifications of new interactions

Agents receive notifications of new interactions in one of two ways. An interaction can 'ring' in the Inbox and agents can receive toaster notifications of new interactions.

Ringing states in Ignite

When interactions reach an agent's Inbox, the interactions are in a ringing state until the agent puts them into reply mode or until the requeue timer expires.

Ignite indicates a ringing interaction as follows:

- DESKTOP - Ignite marks ringing interactions in red, and indicates in red the number of interactions ringing in the Inbox.
- WEB - Ignite marks ringing interactions with a 'ringing' icon, and the agent's state indicates 'Incoming'.

NOTE:

- With the exception of transferred interactions, in Push and Mixed routing models agents do not receive items in their Inbox if the Inbox contains ringing interactions of the same media type. Once ringing interaction is put into reply mode, another interaction of that media type is pushed to the Inbox in a ringing state if the agent's Workload permits. This behavior continues until an agent's Workload is met.
- For MiVoice Connect phones, if the ring count for ACD calls exceeds the requeue timer, which is set to 30 seconds by default, calls will directly connect to agent's voice mail.

Receiving toaster notifications of new interactions

Ignite sends agents toaster notifications of interactions offered to the Inbox.

Toaster notifications indicate the interaction's media type and display information such as originating phone number, subject, and queue name. Information displayed varies by media type.

Agents can accept or decline the interaction by selecting the appropriate option on the toaster notification. Option availability varies by the interaction's media type.

NOTE: Accepting emails sends them to the agent's Inbox. Agents can open them in reply mode with Cc'd recipients included in the reply.

Please note the following behavior:

DESKTOP

- If agents are permitted to preview interactions, clicking anywhere within the notification opens Ignite with the item ringing in the Inbox. Agents are then able to preview the interaction.
- If the agent does not act on the notification by accepting, declining, or previewing the interaction, the Ignite icon flashes in the taskbar and eventually remains a solid color until the application is selected.

WEB

- When Ignite is in focus, the toaster notification pops with options to Accept and, depending on the interaction's media type, Decline the interaction. If Ignite is not in focus, a notification indicates a ringing interaction. Clicking a notification takes you to the relevant interaction.

  NOTE: Internet Explorer does not pop notifications when Ignite is not in focus.
- When Ignite is minimized, clicking the notification opens Ignite with the item ringing in the Inbox. Agents are then able to handle the interaction.
- When accepting open media interactions, the link that displays depends on TargetUri settings and, as such, may display as embedded content within Ignite (WEB) or as a new page in the browser. Please note that some web applications do not support iframe embedded content, such as is used with Ignite (WEB). If you want content to be embedded in Ignite (WEB), you must enable iframe embedding in such 3rd party web applications.

Receiving information in screen pops

When interactions are ringing in the Inbox, agents may receive screen pops on their desktops.

Screen pops differ from toaster notifications. Toaster notifications alert agents to ringing interactions and indicate basic information such as the interaction’s media type. A screen pop displays information relevant to handling a specific interaction.

For example, a screen pop may display a web page listing a customer’s recent interaction history. Agents use screen pops to provide more personalized, informed customer service. It is the agent’s responsibility to close the screen pop once the information is no longer required.

Screen pops open on agents’ desktops when a ringing item is selected in the Inbox.

If you are receiving two screen pops and/or two toaster notifications for a single interaction, consult your supervisor or system administrator.For more information on toaster notifications, see *"Receiving toaster notifications of new interactions"*.

NOTE:

- If you receive a security warning when your screen pop displays, consult your supervisor or system administrator about disabling the warnings.

- WEB - By default, screen pops open in a new tab but obey browser configuration and may therefore open in a new window.
- WEB - If screen pops are not displaying you may need to disable pop-up blockers for this site.

Tagging interactions with Account Codes

Account Codes are used for reporting purposes. They are numbers identifying services, departments, or other elements of the contact center. Agents can tag interactions with Account Codes in Ignite to indicate in reports what the interaction was about.

For example, an agent handling chats for three catalog companies enters an Account Code of ‘01’ to indicate that the customer is inquiring about Company A. Later in the same chat interaction the agent enters an Account Code of ‘06’ to indicate that the customer is inquiring about Company A’s mail-out services.

Agents can only apply Account Codes when replying to interactions. Agents can tag interactions with multiple Account Codes but cannot configure Account Codes in Ignite.

Please note the following limitations regarding tagging voice interactions with Account Codes in Ignite

- Voice interactions handled in Ignite can only be tagged with non-verified Account Codes. Verified Account Codes are entered before an outbound voice interaction and can be applied via Contact Center Client. For more information on verified Account Codes in your contact center, contact your system administrator.
- Tagging interactions with Classification Codes is supported from Ignite for voice interactions only. Classification codes associate the entire interaction handling duration to the Account Code selected. This includes transfer time. It also includes Work Timer duration if 'Include queue work timer as part of handling time' is enabled on the queue. To learn more about applying Classification Codes to voice interactions, see *"Tagging calls with Classification Codes"*.

NOTE: Classification Codes are not supported for multimedia interactions, only Account Codes may be used on multimedia interactions.

NOTE: Account Codes on emails are terminated after employee logout. Agents logging into Ignite to resume work on emails must re-enter their last Account Code.

To tag an interaction with an Account Code (DESKTOP)

1) In the **Preview** pane, expand **History and Account Codes** and select **Account Codes**.
2) Expand any Account Code groups, if required.
3) Beside the Account Code you are using to tag the interaction, click **Apply**.

   Account Codes applied to an interaction are marked in bold.

   NOTE: Alternatively, apply Account Codes via the Account Code button that displays in theSidebar.

To tag an interaction with an Account Code (WEB)

1) Select an interaction or hover over the item avatar and click **Apply Code**. The account codes/categories are displayed in tree view (as configured in YSE) in the **Apply Classification/Account Code** window.
2) Select an Account Code. You can type the name or number of a code in the **Search** field. Optionally, use the **Expand** or **Collapse** buttons to view account codes and select the required account code.

NOTE: If you enter a number or the name in the search field, and the system returns only one result, you can apply the Code by pressing **Enter**.

Sending interactions back to the queue

When interactions reach an agent's Inbox, the interactions are in a ringing state until the agent clicks the Reply button and Ignite goes into reply mode.

Interactions can be sent back to the queue for several reasons. First, interactions requeue when declined by an agent. Second, ringing interactions in the Inbox requeue when the ringing timer expires. Third, interactions on hold requeue when the hold timer expires, including emails automatically placed on hold after agent's logout. Fourth, interactions in the Inbox can requeue on employee logout. However, administrative configuration determines requeue behavior for email interactions in the Inbox.

In each instance, the interaction is returned to the queue as the longest waiting. Unless logged out, the employee is put into a Busy/Make Busy state across all agent capabilities, and a System Make Busy is registered.

Agents logging out of Ignite with interactions in the Inbox are notified whether relevant interactions will be requeued (DESKTOP). However, in these instances a System MKB is not registered against the employee.

Requeued emails contain any response text drafted. This text is visible to other employees who handle the email. Agents can choose to include the drafted content when previewing requeued emails in queue.

Requeued chat and SMS interactions contain all of the previous interaction between contact and agent.

If the system immediately requeues interactions on logout, to avoid losing work we recommend that agents either complete their work or transfer the item to a queue before logging out.

NOTE:

- The time allotted to answer ringing interactions, the duration for which interactions can be on hold before requeuing, and requeue behavior for email interactions on employee logout is determined by administrative configuration. For more information, contact your supervisor or system administrator.
- Logging in and logging out of Ignite does not reset the duration interactions can be on hold before requeuing.

Transitioning from one conversation type to another (WEB)

During an interaction, agents can transition between interaction types. For example, an agent in the Support queue who is in a chat interaction with a customer can transition to voice.

The agent can transition to an alternate interaction type only if the agent is associated with that media type and if the customer's relevant contact details are available. Agents can also edit contact information during an interaction.

NOTE: Agents cannot transition from other media types to a chat interaction, as chats are inbound only.

The following explains how to

- Transition interactions to an alternate interaction type
- Update contact details during an interaction

To transition to an alternate interaction type

1) Click **Inbox** and select the interaction or hover over the item avatar.
2) Click the action icon based on the interaction type.

   *For example, with an email interaction, click **Reply**, or with a chat interaction, reply to the chat messages.*
3) From the handling icons, click the interaction type icon to which you want to transition. Optionally, you can hover over the item avatar in the Inbox to view the handling icons.

   NOTE: You can edit the contact information for the customer during the interaction and you can view the updated contact information and, if required, can transition to an alternate interaction type.
4) Continue the interaction in the transitioned interaction type.

Agents - Handling customer interactions in a multimedia contact center

Agents in a multimedia contact center are enabled to handle interactions of various media types, including voice, email, chat, SMS, and open media. Ignite enables agents to interact with customers, view and adjust their Agent Group Presence and Busy/Make Busy and Do Not Disturb states, and view statistics in real time to determine availability of other agents and to be aware of current contact center conditions.

Agent preferences, such as login ID and language, can be modified in CCMWeb, your online center for personal settings and accessing the Help resource documentation.

Managing agent preferences

Agents can manage their preferences in CCMWeb, a web-based application that provides agents with the ability to view and change settings associated with their login ID. Using the options under CCMWeb's My options tab, agents can set their language preferences, view their security roles, change their password, and manage lists of contacts for emailing reports. Via options under the Help tab, agents can access help documentation, view software information, and download the Client Component Pack installation file.

See *"Setting up user preferences"* to learn how to set user preferences, view security roles, and configure email contacts.

1.4. Contact Center Client

The Contact Center PhoneSet Manager and Contact Center Softphone applications are designed for provide employees with the 3300 ICP telephone system. They provide ACD agent functions and enable agents ability to use their desktop computers as IP-based phones. Contact Center PhoneSet Manager and Contact Center Softphone are designed for the 3300 ICP telephone system.

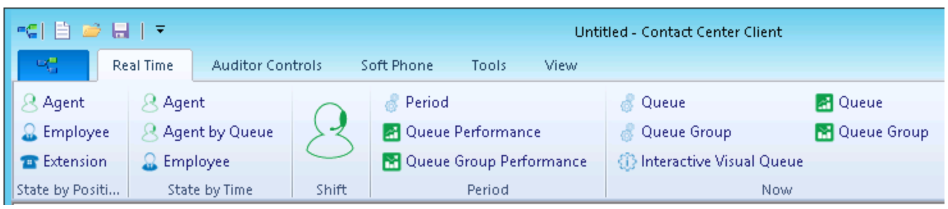
Contact Center Client

NOTE:

- Your ability to view real-time monitors and devices in Contact Center Client is dependent on administrative security settings.
- An employee must be a member of an employee group in order for you to view the employee on the employee group monitors in Contact Center Client. A queue must be a member of a queue group in order for you to view the queue on the queue group monitors in Contact Center Client.
- The number of employees extensions logged on at any time must be consistent with your software license.

Contact Center Client uses ribbons for device and monitor control. (See the following figure.)

Figure 26: Contact Center Client ribbon



Some tabs that display in the ribbon are dependent upon which monitor is active. These are referred to as context sensitive tabs. When you enable context sensitivity for monitors, the associated context sensitive tab for the active monitor automatically becomes the active tab. See the following table for a list of the associated context sensitive tabs for each monitor. See the following figure for an example of context sensitivity enabled for the Agent State by Position monitor. Note that the Agent and Monitor Control tabs display in the ribbon.

NOTE: The options that display in the Contact Center Client ribbon are dependent upon your individual security settings. Options which you are not given access to will not display.

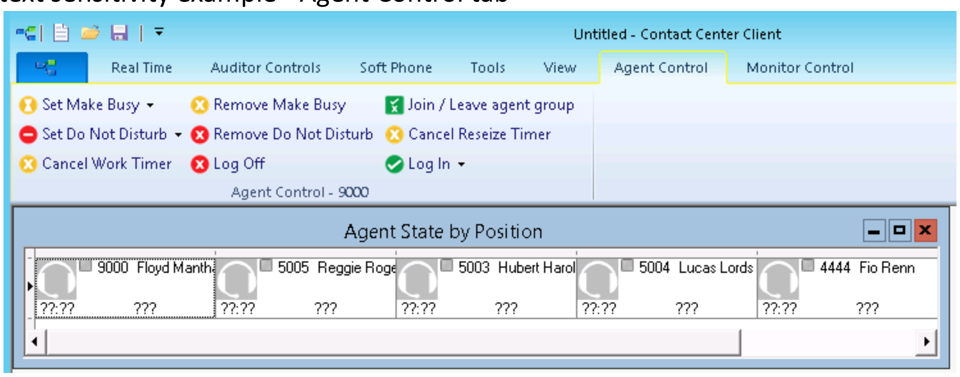
Table 14: Context sensitivity options display per monitor (Sheet 1 of 2)

Monitor	Associated context sensitive tabs
Agent State by Position	Agent and Monitor Control tabs
Extension State by Position	Extension and Monitor Control tabs **NOTE:** When an agent is logged into an extension, the context sensitivity tab displays 'Agent Control'. When no agent is logged into the extension, the context sensitivity tab displays 'Extension Control'.
Extension Now	Monitor Options tab
Agent State by Time	Agent and Monitor Control tabs
Agent State by Time for Queue	Agent and Monitor Control tabs
Employee State by Time	Employee and Monitor Control tabs
Agent Shift	Agent and Monitor Control tabs

Table 14: Context sensitivity options display per monitor (Continued) (Sheet 2 of 2)

Monitor	Associated context sensitive tabs
Queue by Period	Monitor Options tab
Queue Now	Monitor Options tab
Queue Group Now	Monitor Options tab
Queue Performance	Chart Options tab
Queue Group Performance	Chart Options tab
Queue	Chart Options tab
Queue Group	Chart Options tab
Interactive Visual Queue	n/a **NOTE:** Context sensitivity is not supported for the Interactive Visual Queue monitor

Figure 27: Context sensitivity example - Agent Control tab



Starting Contact Center Client

You start Contact Center Client to access real-time functionality.Supervisors and agents can view real-time voice statistics. In contact centers that have the optional Multimedia Contact Center application, supervisors and agents can view real-time voice, email, chat, SMS, and open media statistics. After starting Contact Center Client, you can choose to minimize it to either the system tray or the taskbar, depending on your operating system.

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

To start Contact Center Client

1) Open **Contact Center Client**.
2) If prompted, type your **Username** and **Password** and verify the **Enterprise Server IP** address.
3) If you use Secure Socket Layer, select **SSL**.

4) Optionally, select **Remember my credentials**.
5) Click **Login**.

To display Contact Center Client in the taskbar

1) In Contact Center Client, click the **File** tab.
2) Click **Options**.
3) Clear the **Hide when minimized** check box and click **OK**.
   Contact Center Client, when minimized, will display in the taskbar.
4) To save the profile, click **File > Save as**.
5) Type a **Name** for the profile and click **OK**.
   The profile is saved and will automatically be applied each time you open Contact Center Client.
   When your System Administrator changes device settings (such as changes to naming or associations between devices), they will be automatically reflected in your Contact Center Client user profile.

Employee and Agent states

NOTE:

- If Contact Center Client becomes disconnected from the server, upon re-connection the following states will automatically be synchronized with the server.

The following table lists the employee states and their corresponding icons.

The following table lists the agent states and their corresponding icons.

Table 15: Employee states (Sheet 1 of 3)

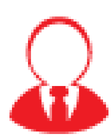
Term	Icon	Meaning
Ringing		An ACD interaction ringing on the employee, waiting to be handled
ACD		An employee handling an ACD interaction
ACD Hold		An employee who has placed an ACD interaction on hold
Idle		An employee logged on and waiting to receive an interaction

Table 15: Employee states (Continued) (Sheet 2 of 3)

Term	Icon	Meaning
Non ACD		An employee involved in an incoming Non ACD interaction or employee-originated voice interaction
Non ACD Hold		An employee who has placed a Non ACD voice interaction on hold
Outbound		An employee on an outgoing voice interaction
Outbound Hold		An employee who has placed an outgoing voice interaction on hold
Do Not Disturb		An employee who has activated Do Not Disturb and is not available to receive any ACD or Non ACD interactions
Make Busy		An employee who is not available to receive ACD interactions but can receive transferred interactions and voice interactions dialed directly to the employee This icon also displays when an agent is in the Reseize Timer state. When voice agents fail to answer a voice interaction, agents are placed in Make Busy (Reseize Timer) This icon also displays when an external hot desk agent is in the Reseize Timer state

Table 15: Employee states (Continued) (Sheet 3 of 3)

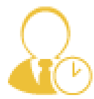
Term	Icon	Meaning
System Make Busy		An employee that the system has put into a state where they cannot receive ACD contacts. For example, if an employee is offered a communication and does not answer, they will be put into System Make Busy for a predetermined length of time.
Work Timer		An employee who is completing post-contact work, such as paperwork, and is unavailable to receive interactions of that media type
Logged Off		An employee not currently logged in to any queue
Logged In Not Present		An employee logged in but not present in any of their agent groups, and employees not present in a media type across all groups.
Unavailable		An employee who has not generated any activity since Mi Contact Center Business was started

Table 16: Agent states (Sheet 1 of 4)

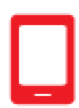
Term	Voice	Email	Chat	SMS	Meaning
Ringing					An ACD interaction ringing on an agent, waiting to be handled
ACD					An agent handling an ACD interaction

Table 16: Agent states (Continued) (Sheet 2 of 4)

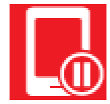
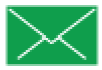
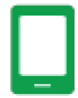
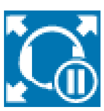
Term	Voice	Email	Chat	SMS	Meaning
ACD Hold					An agent who has placed an ACD interaction on hold
Idle					An agent logged on and waiting to receive an interaction
Non ACD		-	-	-	An agent involved in an incoming Non ACD interaction or agent-originated voice interaction
Non ACD Hold		-	-	-	An agent who has placed a Non ACD voice interaction on hold
Outbound		-	-	-	An agent on an outgoing voice interaction
Outbound Hold		-	-	-	An agent who has placed an outgoing voice interaction on hold
Do Not Disturb					An agent who has activated Do Not Disturb and is not available to receive any ACD or Non ACD voice interactions

Table 16: Agent states (Continued) (Sheet 3 of 4)

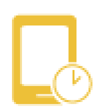
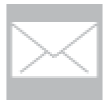
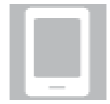
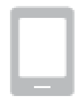
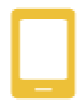
Term	Voice	Email	Chat	SMS	Meaning
Make Busy					An agent who is not available to receive ACD interactions but can receive transferred interactions and voice interactions dialed directly to the agent This icon also displays when an external hot desk agent is in the Reseize Timer state
System Make Busy					An employee that the system has put into a state where they cannot receive ACD contacts. For example, if an employee is offered a communication and does not answer, they will be put into System Make Busy for a predetermined length of time.
Work Timer					An agent who is completing post-contact work, such as paperwork, and is unavailable to receive interactions of that media type

Table 16: Agent states (Continued) (Sheet 4 of 4)

Term	Voice	Email	Chat	SMS	Meaning
Unknown					An agent who has not generated any activity since Mi Contact Center Business was started
Logged Off					An agent not currently logged in to any queue
Logged In Not Present					An agent logged in but not present to any of their agent groups, and agents not present to a media type across all groups

Extension states

NOTE:

- If your Contact Center Client becomes disconnected from the server, upon re-connection the extension states will automatically be synchronized with the server.
- If an agent is logged into the extension, agent state icons will display. See *"Employee and Agent states"*.

The following table lists the extension states and their corresponding icons.

Table 17: Extension states (Sheet 1 of 2)

Term	Icon	Meaning
Ringing		Call is ringing on the extension and waiting to be handled
Idle		Extension is waiting to receive a call

Table 17: Extension states (Continued) (Sheet 2 of 2)

Term	Icon	Meaning
Non ACD		Extension is involved in an incoming call or an internal extension-originated call
Non ACD Hold		Extension has placed an incoming call or an internal extension-originated call on hold
Outbound Call		Extension is on an outgoing call
Outbound Hold		Extension has placed an outgoing call on hold
Forwarded to		Extension has set all incoming calls to be forwarded to an alternate answer point
Camp on		Extension is on a call and an incoming call is camped on (waiting to be answered)
Off Hook		Extension's phone is off the hook, so cannot receive calls
Do Not Disturb		Extension has activated Do Not Disturb and is not available to receive calls
Logged Off		Extension is not currently logged on and is unavailable to take calls
Logged In Not Present		Extension is removed from its Ring Groups
Unknown		Extension has not generated any activity since MiVoice Analytics was started

Understanding Contact Center Client features

Contact Center Client has agent, queue, queue chart, and call note monitors. For information on adding and viewing call notes, see *"Adding call notes to a call"*.

You can perform the following tasks on the monitors by either right-clicking within the monitor or selecting options via the Contact Center Client ribbon:

- Call recording
- Open monitors
- Dock monitors
- Add and remove device IDs
- Sort monitor devices
- Rearrange cells
- Set monitor dimensions
- Freeze and unfreeze columns
- Hide and show columns
- Filter device variables
- Set alarms
- Clear alarms
- Define monitor styles
- Group data
- Print monitors
- Arrange windows
- Modify the view
- Build marquee monitors to broadcast statistics and messages
- Chat online with other employees

Contact Center Client options

The following options apply to real-time monitors.

Call recording

On the Agent State by Time, Agent State by Position, Agent State by Queue by Time, and Extension by Position monitors, the Call recording option enables you to start, stop, and restart call recording at any time during a call. See *"Recording calls"*.

Clear alarms

The Clear alarms command clears any current performance variable threshold alarms.

Set alarms

The Set alarms command specifies performance thresholds for queues, extensions, and agents.

Add/Remove devices

The Add/Remove devices command adds or removes devices or device groups from the monitor. If you add agents, they are added to the bottom of the monitor.

Set table dimensions

On the Agent State by Position, Extension State by Position, and Employee State by Position monitors, the Set table dimensions command adds or deletes columns or rows. If you delete devices, they are deleted them from the lower-right side of the monitor.

Size table to frame

On all monitors, the Size table to frame command adjusts the table to fit within the frame

Sort monitor

On the Agent State by Position, Extension State by Position, and Employee State by Position monitors, the Sort monitor by Agent ID, name, state, or extension command sorts agents by Agent ID, name, state and time in state, or extension.

Note that you cannot drag and drop devices between monitors.

Filter device variables

On the Extension Now, Agent Shift, Queue by Period, and Queue Now monitors the Filter device variables command filters the data based on conditions you specify and displays a subset of data on the monitor.

General

On all monitors, under Properties, the General option specifies the monitor name and enables the horizontal and vertical scroll bars.

On the queue monitors, you can also enable grouping.

On the extension, agent, and employee monitors you can also display tool tips, display a pattern upon failover, and display instant messaging online presence indicators.

On the Agent and Employee State by Time monitors, you can also sort logged off agents by the longest logged off first.

Print monitor

The Print monitor command prints the current monitor.

Enable grouping

Under Properties, the Enable grouping option displays a grouping panel to which users can drag columns. The grouping order determines the order in which the rows display. The Enable grouping option affects all monitors that contain columns.

Row settings

Under Properties > Layout, the Row settings option specifies the background color and font color of rows, and the font type and text alignment.

Row alternate settings

Under Properties > Layout, the Row alternate settings option specifies the background color and font color of alternate rows, and the font type and text alignment.

Column settings

Under Properties > Layout, the Column settings option specifies the background color and font color of columns, and the font type and text alignment.

Column dimensions

Under Properties > Layout, the Column dimensions option specifies the column height and width.

Column order

Under Properties > Layout, the Column order option hides or displays individual columns, and specifies the order of columns across the monitor.

Monitor style

Under Properties > Layout, the Monitor style option specifies styles and skins (sets of styles) for the monitor, and the Card design option specifies how information is displayed in the cells of extension, agent, and employee monitors.

Cascade

When you right-click a monitor tab, under Windows, the Cascade command distributes active monitors down and across the Contact Center Client window.

Tile vertically

When you right-click a monitor tab, under Windows, the Tile vertically command distributes active monitors across the Contact Center Client window.

Tile horizontally

When you right-click a monitor tab, under Windows, the Tile horizontally command distributes active monitors down the Contact Center Client window.

Dock Contact Center Client

When you right-click a monitor tab, under Windows, the Dock Contact Center Client command docks Contact Center Client at the top, bottom, left, or right of your desktop.

Always on top

When you right-click a monitor tab, under Windows, and select the Always on top command, Contact Center Client always displays on your desktop on top of all other open applications.

View

The View command hides or displays the main menu, status bar, real-time monitors, voice, email, chat, SMS, and open media legends.

Diagnostics monitor

The log and error monitors are accessed via Contact Center Client.

To access log and error monitors

1) Click **Tools** in the Contact Center Client ribbon.
2) Click either **Log Monitor** or **Error Monitor**, depending on what kind of log information you want to review.

   See the following figure

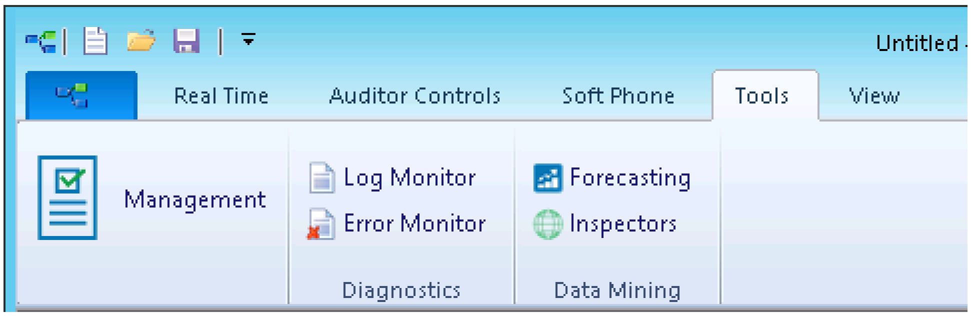


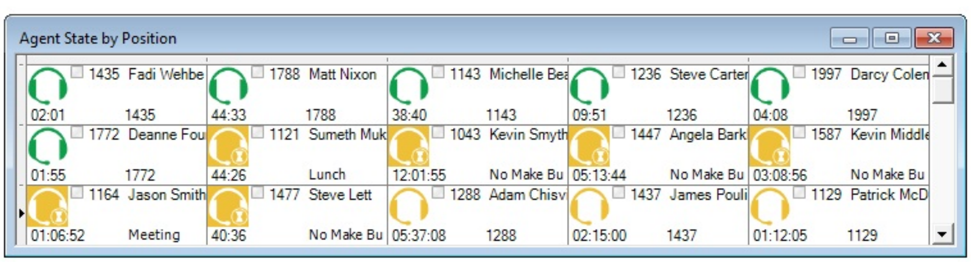
Figure 28: Diagnostics Monitor

Viewing Real-Time Information

Viewing agent availability

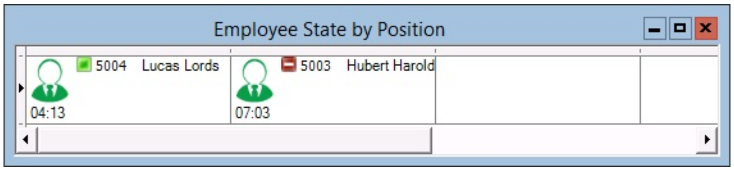
Contact Center Client provides instant messaging capabilities for both supervisors and agents and is typically used by contact center employees. Contact Center Chat provides the online chat presence of contact center employees, including Online, Offline, and Away. On the agent, employee, and extension monitors, agents can view the availability and presence of other contact center employees before they transfer calls or send online chat messages. (See the following figure.) If an agent cell in a monitor is grayed out, the phone is not connected to the network and considered out of service. The out of service state applies to phones that are not connected to the network, remote agents and employees that have lost their Internet connection, phones that are physically disconnected or malfunctioning, or employees that are not logged into their soft phone.

Figure 29: Agent State by Position - viewing agent availability and online presence



With the addition of Microsoft Skype for Business Server, agents and supervisors use Skype for Business Client as their default instant messaging client. The presence of all company employees is natively delivered in Contact Center Client. Contact center employees can view the presence of both internal and external contacts to determine if they are available to communicate. In addition to Available, Offline, and Away, employees see In a Meeting, Busy, In a call, Do Not Disturb, Be Right Back, and other presence indicators. (See the following figure.)

Figure 30: Employee State by Position - viewing employee availability and enhanced presence



The following monitors display agent activities:

- Agent State by Position
- Employee State by Position
- Extension State by Position
- Agent State by Time
- Employee State by Time
- Agent Shift

Extension, Agent, and Employee State by Position

The Extension, Agent, and Employee State by Position monitors provide real-time information in cells that you can arrange to mirror your floor plan: you can view extensions, agents, or employees by their physical position in your contact center. In addition, these monitors enable you to view the current status of general business extensions. Card designs enable you to customize the information displayed in the cells. See *"Customizing the information displayed on position and time monitors"*.

Agents can join multiple agent groups and therefore answer for multiple queues. However, each agent has only one ID and displays in a single cell of each applicable monitor. The agent activity that displays in the monitor cell reflects their current overriding action.

When you first open a monitor, you can select a card design:

- The Classic card displays the agent state, time in the state, presence, agent/employee name, agent login ID/employee ID, and extension number (or queue name for voice agents on ACD or on ACD Hold).
- The Caller ID card displays the caller name and number (ANI), the number the caller/employee dials for incoming/outgoing calls, the state, time in the state, presence, agent/employee name, agent login ID/employee ID, and extension number (or queue name for voice agents on ACD or on ACD Hold).
- Custom cards you create and share display customized extension/agent/employee and/or caller information

Caller ID information is displayed when

- Extensions, Agents, and employees are in the following real-time states: ACD, ACD Hold, Ringing, Non ACD, Non ACD Hold, Out, and Out Hold Time
- Extensions are in the following real-time states: Inbound and Outbound

You can set alarms for all real-time statistics and for caller ID information, such as the caller name and number.

NOTE: Before you can select the Caller ID card on the Add devices window of monitors, you must make the card available. To do so, right-click an open monitor, select the Caller ID card under Properties, Layout > Card design and click Apply.

In a fault tolerant setup, if a network outage occurs the cells in the agent, employee, and extension monitors display a crisscrossed pattern to identify agents who have homed to their secondary controllers.

If an agent cell in a monitor is grayed out, the phone is not connected to the network and considered out of service. The out of service state applies to phones that are not connected to the network, remote agents and employees that have lost their Internet connection, phones that are physically disconnected or malfunctioning, or employees that are not logged into their soft phone.

Viewing the activities of agents who can log on to multiple voice queues

In the following figure, the Agent State by Position monitor shows three cells for Andre Bourque, each with a different agent ID. The first two cells show Andre logged off of the telephone system. The third cell shows Andre's current state. Andre is logged on to Queue 151 using Agent ID 2013. He has been on an ACD call for 12 minutes and 50 seconds.

Figure 31: Agent State by Position - viewing multiple agent IDs

Agents can log on to the telephone system using only one agent ID at a time. If your agents have multiple voice IDs (and therefore multiple cells) the Agent State by Position monitor becomes cluttered.

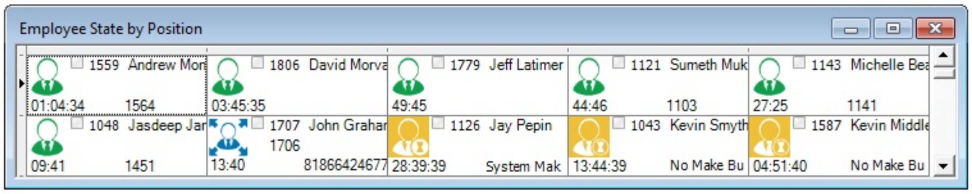
If you have agents who are cross trained to answer calls for different departments (and log in and out of various voice queues) the telephone system requires you assign the agents multiple IDs. You can use the Agent State by Position monitor to view the activities of each department. You create an Agent State by Position monitor for each department. When you arrange the cells for the agents in the same order for each department, you can easily compare the activities of one department with another.

Viewing the current logged on states of agents who log on to multiple queues

If you have voice agents who are cross trained to answer calls for different departments (and log in and out of several queues) the telephone system requires you assign the agents multiple IDs. If a voice agent has multiple agent IDs and you want to view the agent's current logged on state only, you use the Employee State by Position monitor.

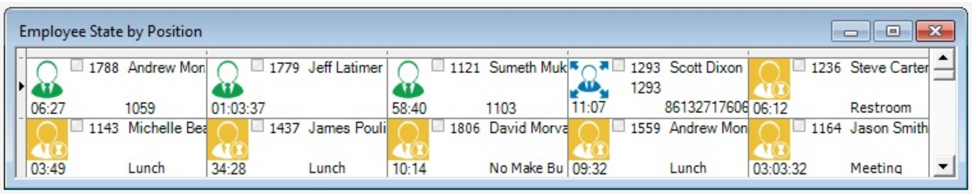
To view the monitor, you open the Employee State by Position monitor and select employees to add to the monitor. The monitor shows one cell for Andrew, listing his current state and agent ID. (See the following figure.)

Figure 32: Employee State by Position - viewing the ID to which the agent is logged on



Andrew is currently logged on to Extension 1564 using Agent ID 1559. Sometime later you notice Andrew is logged on to Extension 1059 using Agent ID 1788. (See the following figure.)

Figure 33: Employee State by Position



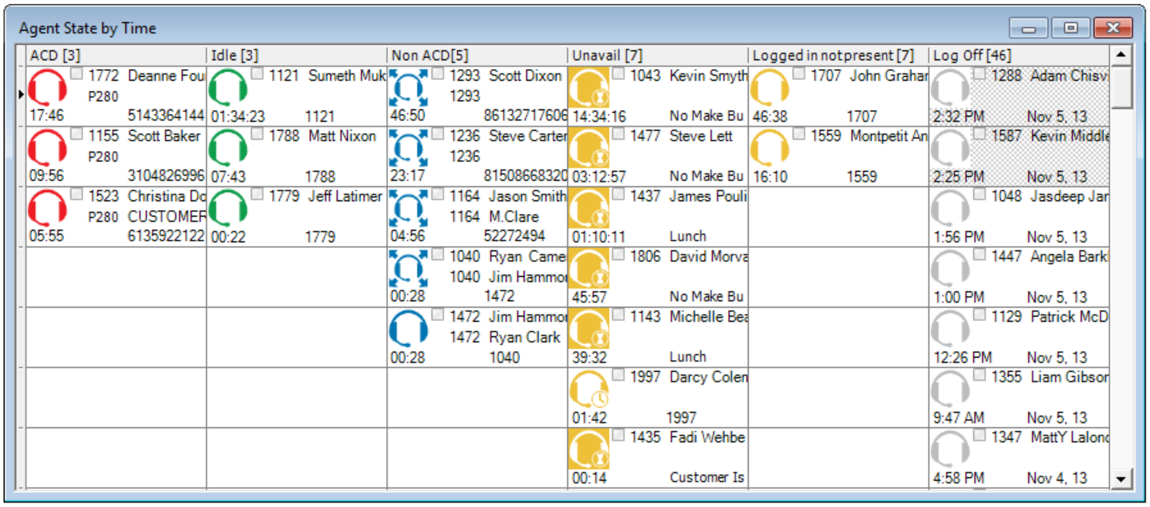
Agent State and Employee State by Time

The Agent State by Time and Employee State by Time monitors provide real-time agent information under ACD, Idle, Non ACD, Unavailable, and Logged Off column headings. They display the same real-time information as that of the Extension State by Position, Agent State by Position, and Employee State by Position monitors. See *"Extension, Agent, and Employee State by Position"*.

If an agent is in an email, chat, or SMS agent state, the monitors display the queue number to which the agent is logged on. Each column lists agents in order of time in state. You can specify which columns of agent statistics are displayed, and the order in which they are displayed. You can sort logged off agents by the longest logged off first. (See the following figure.)

If you have agents who are cross trained to answer calls for different departments (and log in and out of various voice queues) the ACD routing system requires you assign the agents multiple IDs. You use the Employee State by Time monitor to view the activities of voice agents with multiple agent IDs. See *"Viewing the current logged on states of agents who log on to multiple queues"*.

Figure 34: Agent State by Time



The following table lists the Agent State by Time and Employee State by Time column headings and their associated agent states.

Table 18: Agent State by Time and Employee State by Time column headings

Category	Associated agent states
ACD	includes agents in ACD and agents in ACD Hold
Idle	includes agents in the Idle state
Non ACD	includes agents in Non ACD, in Non ACD Hold, Outbound agents, and Outbound Hold agents
Unavailable	includes agents in Do Not Disturb, Make Busy, Work Timer, Reseize Timer, and Unknown
Logged in not present	includes agents logged in but not present to any of their agent groups, and agents not present to a media type across all groups
Log Off	includes agents in the Logged Off and Offline (Ignite, WEB) states

Agent State by Time for Queue

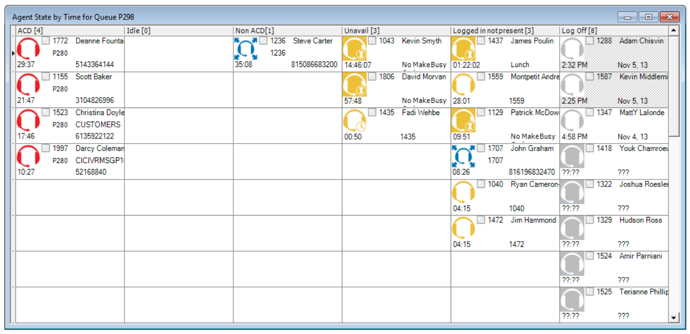
The Agent State by Time for Queue monitor is a Contact Center Client real-time monitor designed specifically for contact centers using Agent Group Presence functionality. However, the Agent State by Time for Queue monitor is available for all media server types.

The Agent State by Time for Queue monitor is accessed from the Real Time tab in Contact Center Client and displays all agents configured in a specific queue and agents who are on ACD calls, idle, on Non ACD calls, unavailable, logged on to the system (but not present in the queue being monitored), and logged off. (See the following figure).

NOTE:

- Virtual queue groups are shown under the Virtual queue groups section of the Agent State by Time for Queue monitor. Any Agent State by Time for Queue monitors that are monitoring virtual queues are marked in the title as (virtual).
- The Agent State by Time for Queue monitor does not support viewing Ring Groups.

Figure 35: Agent State by Time for Queue



The following table lists the Agent State by Time and Employee State by Time column headings and their associated agent states.

Table 19: Agent State by Time for Queue column headings

Category	Associated agent states
ACD	includes agents in ACD and agents in ACD Hold
Idle	includes agents in the Idle state
Non ACD	includes agents in Non ACD, in Non ACD Hold, Outbound agents, and Outbound Hold agents
Unavailable	includes agents in Do Not Disturb, Make Busy, and Work Timer, and Reseize Timer
Logged in not present	includes agents logged in but not present to any of their agent groups, and agents not present to a media type across all groups
Log Off	includes agents in the Logged Off, Unknown, and Offline (Ignite, WEB) states

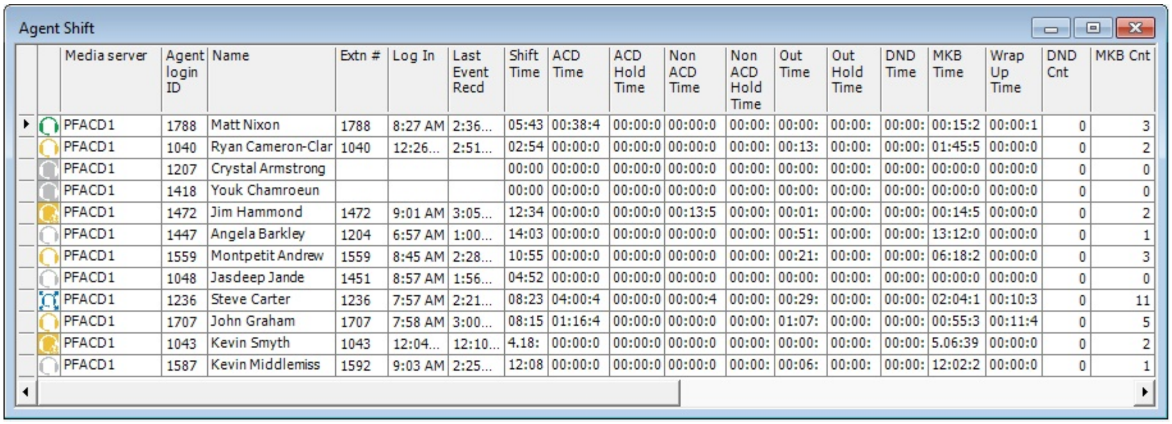
To view the Agent State by Time for Queue monitor

1) In the Contact Center Client ribbon, click the Real Time tab.
2) In the State by Time column on the ribbon, click Agent by Queue.
3) Select the queues to monitor. You can optionally sort members in either ascending or descending order.
4) Click OK.

Agent Shift

The Agent Shift monitor provides running totals of statistics on individual agents for the day. You can specify which columns of statistics are displayed, rearrange columns, and sort individual columns in ascending or descending order. (See the following figure.)

Figure 36: Agent Shift



Agent Shift

Media server	Agent login ID	Name	Extn #	Log In	Last Event Recd	Shift Time	ACD Time	ACD Hold Time	Non ACD Time	Non ACD Hold Time	Out Time	Out Hold Time	DND Time	MKB Time	Wrap Up Time	DND Cnt	MKB Cnt
PFACD1	1788	Matt Nixon	1788	8:27 AM	2:36...	05:43	00:38:4	00:00:0	00:00:0	00:00:	00:00:	00:00:	00:00:	00:15:2	00:00:1	0	3
PFACD1	1040	Ryan Cameron-Clar	1040	12:26...	2:51...	02:54	00:00:0	00:00:0	00:00:0	00:00:	00:13:	00:00:	00:00:	01:45:5	00:00:0	0	2
PFACD1	1207	Crystal Armstrong				00:00	00:00:0	00:00:0	00:00:0	00:00:	00:00:	00:00:	00:00:	00:00:0	00:00:0	0	0
PFACD1	1418	Youk Chamroeun				00:00	00:00:0	00:00:0	00:00:0	00:00:	00:00:	00:00:	00:00:	00:00:0	00:00:0	0	0
PFACD1	1472	Jim Hammond	1472	9:01 AM	3:05...	12:34	00:00:0	00:00:0	00:13:5	00:00:	00:01:	00:00:	00:00:	00:14:5	00:00:0	0	2
PFACD1	1447	Angela Barkley	1204	6:57 AM	1:00...	14:03	00:00:0	00:00:0	00:00:0	00:00:	00:51:	00:00:	00:00:	13:12:0	00:00:0	0	1
PFACD1	1559	Montpetit Andrew	1559	8:45 AM	2:28...	10:55	00:00:0	00:00:0	00:00:0	00:00:	00:21:	00:00:	00:00:	06:18:2	00:00:0	0	3
PFACD1	1048	Jasdeep Jande	1451	8:57 AM	1:56...	04:52	00:00:0	00:00:0	00:00:0	00:00:	00:00:	00:00:	00:00:	00:00:0	00:00:0	0	0
PFACD1	1236	Steve Carter	1236	7:57 AM	2:21...	08:23	04:00:4	00:00:0	00:00:4	00:00:	00:29:	00:00:	00:00:	02:04:1	00:10:3	0	11
PFACD1	1707	John Graham	1707	7:58 AM	3:00...	08:15	01:16:4	00:00:0	00:00:0	00:00:	01:07:	00:00:	00:00:	00:55:3	00:11:4	0	5
PFACD1	1043	Kevin Smyth	1043	12:04...	12:10...	4.18:	00:00:0	00:00:0	00:00:0	00:00:	00:00:	00:00:	00:00:	5.06:39	00:00:0	0	2
PFACD1	1587	Kevin Middlemiss	1592	9:03 AM	2:25...	12:08	00:00:0	00:00:0	00:00:0	00:00:	00:06:	00:00:	00:00:	12:02:2	00:00:0	0	1

Agent Shift column heading definitions

The following table describes the Agent Shift column headings.

Table 20: Agent Shift column headings (Sheet 1 of 4)

Term	Abbreviated Name	Meaning
Agent State		The agent's media type and current state
Media Server	Media Server	The media server to which the agent is associated
Agent Shift Name	Name	The name of the agent being monitored
Agent login ID	Agent login ID	The login ID of the agent being monitored
Extension Number	Extn #	The extension where the agent logged in (voice only)
Logged On	Log In	The most recent time the agent logged in
Last Event Received	Last Event Recd	The most recent time an agent event occurred

Table 20: Agent Shift column headings (Continued) (Sheet 2 of 4)

Term	Abbreviated Name	Meaning
Shift Time	Shift Time	The total elapsed time logged for the agent, calculated based on the difference between log in and last event received
ACD Time	ACD Time	The duration of ACD interactions handled, from agent pickup to completion (not including hold time)
ACD Hold Time	ACD Hold Time	The duration of time ACD interactions spent on hold
Non ACD Time	Non ACD Time	The duration of Non ACD interactions handled, from agent pickup to completion (not including hold time) (voice only)
Non ACD Hold Time	Non ACD Hold Time	The duration of time Non ACD interactions spent on hold
Outbound Time	Out Time	The duration of time agents spent handling outbound calls (voice only)
Outbound Hold Time	Out Hold Time	The duration of time outbound calls spent on hold, for agents (voice only)
Do Not Disturb Time	DND Time	The duration of time the agent entered the Do Not Disturb State
Make Busy Time	MKB Time	The number of times the agent entered the Make Busy state
Wrap Up Time	Wrap Up Time	The duration of time where Wrap Up Time was the overriding state for the agent. Wrap up time does not include any time spent making or taking interactions during the wrap up timer.

Table 20: Agent Shift column headings (Continued) (Sheet 3 of 4)

Term	Abbreviated Name	Meaning
Do Not Disturb Count	DND Cnt	The number of times the agent entered the Do Not Disturb state
Make Busy Count	MKB Cnt	The number of times the agent entered the Make Busy state
ACD Count	ACD Cnt	The number of ACD interactions handled by the agent
Short ACD Count	Shrt ACD Cnt	The number of ACD interactions handled by the agent where the handle time was less than the Short Handle parameter
Non ACD Count	Non ACD Cnt	The number of Non ACD interactions handled by the agent (voice only)
Hold ACD Count	Hold ACD Cnt	The number of times ACD interactions were placed on hold (voice only)
Non ACD Hold Count	Non ACD Hold Cnt	The number of times Non ACD interactions were placed on hold
Outbound Count	Out Cnt	The number of outbound calls made by the agent (voice only)
Outbound Hold Count	Out Hold Cnt	The number of times outbound calls were placed on hold (voice only)
Contacts Per Hour	Contacts Per Hour	The total ACD interaction count minus the ACD short handle count, divided by the shift time for the agent
On Failover	On failover	Indicates whether the primary media server is offline and has failed over to the secondary media server (voice only)

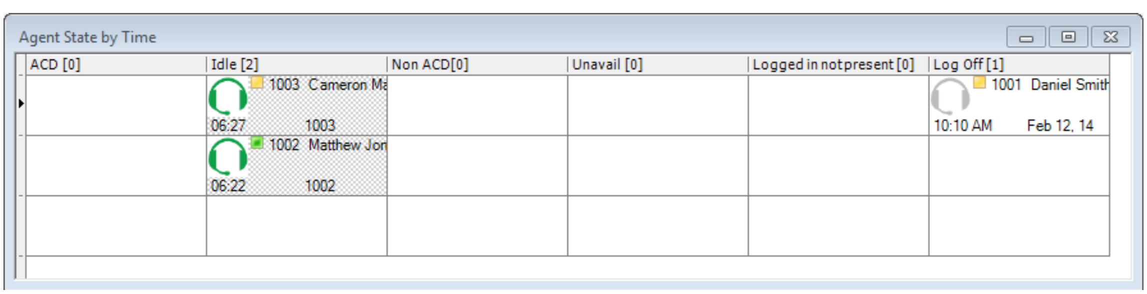
Table 20: Agent Shift column headings (Continued) (Sheet 4 of 4)

Term	Abbreviated Name	Meaning
Agent Unavailable Percent	Agt Unavail %	The percentage of shift time for which the agent was unavailable to receive interactions
Logged In Not Present Time	Logged In Not Present Time	The duration of time the agent was logged into but not present to any of their agent groups, and the duration of time the agent was not present in a media type across all groups
Average Handle	Avg Hndl	The average amount of time the agent spent handling ACD interactions (ACD Time divided by ACD Count, excluding ACD Hold Time)
Occupancy	Occp	The duration of time the agent spent processing interactions, including ringing time

Viewing Agent and Extension Availability and Resiliency

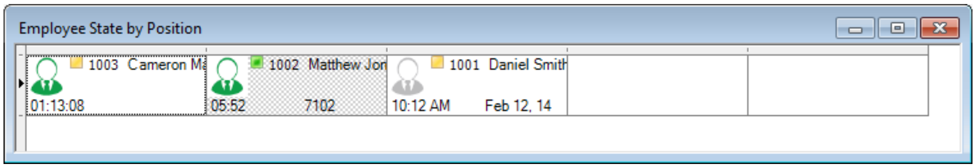
Contact Center Client's Agent, Employee, and Extension real-time monitors provide a visual indication if agents fail over to a resilient media server. In an Agent monitor (Agent State by Position, Agent State by Time, and Agent State by Queue by Time), if an agent fails over to the secondary voice media server, a cross-hatch pattern displays in the agent's cell in the monitor. (See the following figure.)

Figure 37: Agent monitor with failed over agents



In an Employee monitor (Employee State by Position and Employee State by Time), if an employee's agent fails over to the secondary voice media server, a cross-hatch pattern displays in the employee's cell in the monitor. (See the following figure.)

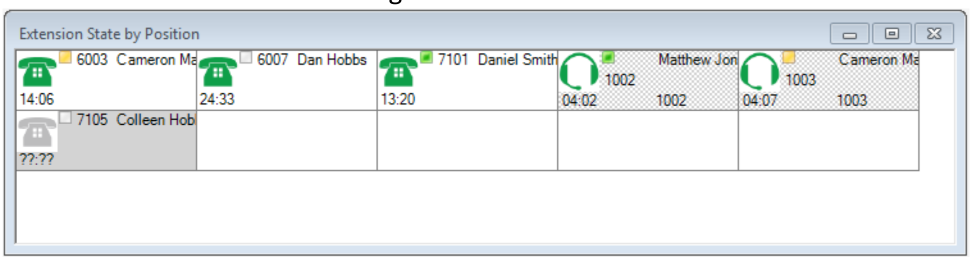
Figure 38: Employee monitor with failed over agents



In an Extension monitor, if a logged in agent who is associated to an extension fails over to the secondary voice media server, then a cross-hatch pattern is applied to the agent's associated extension in the extension monitor. (See the following figure.)

NOTE: Extensions that fail over to the secondary voice media server do not have a cross-hatch pattern applied to their cell.

Figure 39: Extension monitor with failed over agents



Modifying visual indicator settings for agents failing over

By default, monitors are configured to display a pattern if agents fail over to a secondary media server. This setting is optional, however, and can be disabled on a monitor-by-monitor basis.

The following procedures explain how to

- Disable visual indicators for agents failing over
- Enable visual indicators for agents failing over

To disable visual indicators for agents failing over

1) Right-click in an open monitor and select **Properties**.
2) In the **General** tab, clear **Display pattern when on failover**.
3) Click **OK**.

To enable visual indicators for agents failing over

1) Right-click in an open monitor and select **Properties**.
2) In the **General** tab, select **Display pattern when on failover**.
3) Click **OK**.

Viewing extensions availability

In your business, you may be monitoring

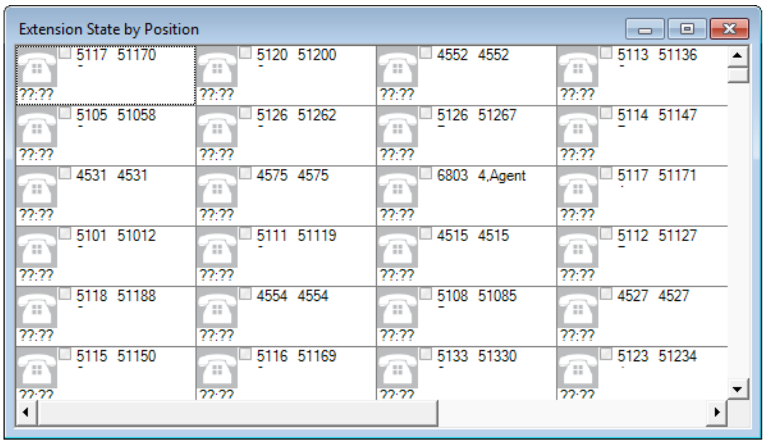
- Traditional or hot desking ACD agents who sit at different desks each day and who log on using their agent ID
- General business, traditional extensions (non-contact center employees) who sit at the same desks each day, are assigned their own desk phone extensions, and do not log on to their phones (their phones are programmed with their personal settings and are always active)

- General business, hot desking extensions (non-contact center employees) who log on to any phone in the enterprise with a virtual extension configured with their personal settings. When the employee logs on the extension becomes active. When the employee logs off of the extension it goes out of service. (See the following figure.)

The following monitors are available for viewing extensions:

- Extension State by Position
- Extension Now

Figure 40: Extension State by Position



You can set up your real-time monitor profile to include two or more Extension by Position monitors: one with cells that are arranged to show the whereabouts of agents employees in your contact center, and another that shows the status of general business extensions: active/inactive, inbound/outbound.

The Extension State by Position monitor shows the state of agents who are not logged into the system. You can use the Extension State by Position monitor to view the Non ACD activity of employees and the current state of general business extensions.

When a phone is out of service, the extension and employee cells in real-time monitors are grayed out. The out of service state applies to phones that are not connected to the network, remote employees that have lost their Internet connection, phones that are physically disconnected or malfunctioning, or employees that are not logged into their soft phone.

Extension Inbound

Extension Inbound refers to a general business extension on an inbound call.

Extension Outbound

Extension Outbound refers to a general business extension on an outbound call.

General business active extension

General business active extension refers to a Mitel desk phone/Contact Center PhoneSet Manager/Contact Center Softphone that is live with no ACD agents logged on (active extension), or an extension to which a general business hot desking user is logged on. The user is an active extension not logged on to any ACD queue.

General business inactive extension

General business inactive extension refers to a Mitel desk phone that has been unplugged or is damaged, or a soft phone that is not running because the computer is turned off or Contact Center Client is not running, or a hot desking extension to which nobody is logged onan extension that is not active because the computer is turned off or Contact Center Client is not running.

Traditional or hot desking ACD agents who sit at different desks each day

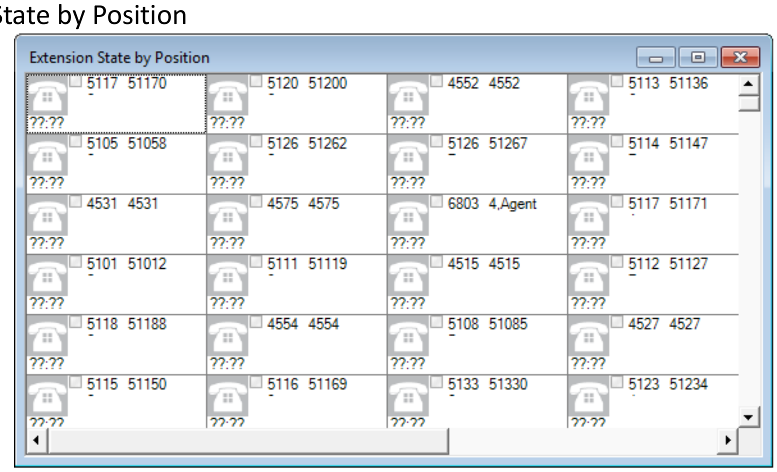
If you have traditional or hot desking ACD agents who sit at different desks each day, you use the Extension State by Position monitor to view where they are sitting in the contact center. After you add Registration Directory Numbers (RDNs)/desk phone extensions to the monitor, you can arrange the cells to match the layout of your contact center.

When nobody is logged on to a particular extension, the monitor cell displays the General business active icon and the phone set RDN ID. When an agent logs on to the desk phone, the monitor cell displays the ACD agent status, (which can include information such as the time in state, queue reporting number, and Make Busy status), the agent ID, the agent name, and the RDN (at the bottom of the cell). Depending on the agent's current state you may see additional information, such as the time in state, queue reporting number, or Make Busy status. If the Caller ID card design is selected, you will also see the caller name and phone number. (See the following figure.)

If you would prefer that Extension State by Position monitor cells be blank when there are no agents logged on to the telephone system, you can right-click the monitor, select Properties, and clear the Enable the general business view check box.

If an agent cell in a monitor is grayed out, the phone is not connected to the network and considered out of service. The out of service state applies to phones that are not connected to the network, remote agents or employees that have lost their Internet connection, phones that are physically disconnected or malfunctioning, or employees that are not logged into their soft phone.

Figure 41: Extension State by Position



General business, traditional extensions who sit at the same desks each day

If you have general business, traditional extensions who sit at the same desks each day, you use the Extension State by Position monitor to view where they are sitting in the contact center. After you add their extensions to the monitor, you can arrange the cells to match the layout of your business, or arrange them alphabetically or by department.

When a general business employee is in Idle, the cell for the employee's phone extension in the Extension State by Position monitor displays the employee's name and extension number, and the General business active icon. When the employee is on an incoming/outgoing call, the cell displays the Extension Inbound/Extension Outbound icon, the employee's name and extension number, and the time in state. If the Caller ID card design is selected, you will also see the caller name and phone number. Either card enables you to readily determine the online and phone availability of general business subject matter experts.

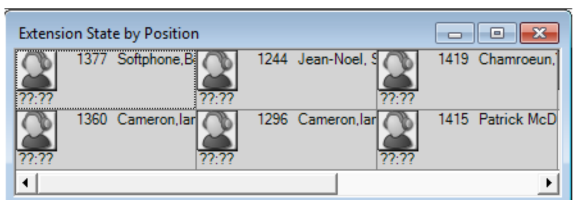
If you prefer that Extension State by Position monitor cells be blank when there are no agents logged on to the system, you can right-click the monitor, select Properties, and clear the Enable the general business view check box.

General business hot desking employees who sit at different desks each day

General business, hot desking extensions can log on to any phone in the enterprise and access their personal settings. When adding extensions to the Extension State by Position monitor, you can arrange them alphabetically or by department.

When an employee is logged on, the monitor cell displays the General business active icon, icon and the employee's name and extension. When the employee is on an incoming/outgoing call, the cell displays the Extension Inbound/Extension Outbound icon and the time in state. If the Caller ID card design is selected, you will also see the caller name and phone number. When the employee logs off, the monitor cell is grayed out (inactive). (See the following figure.)

Figure 42: Extension State by Position

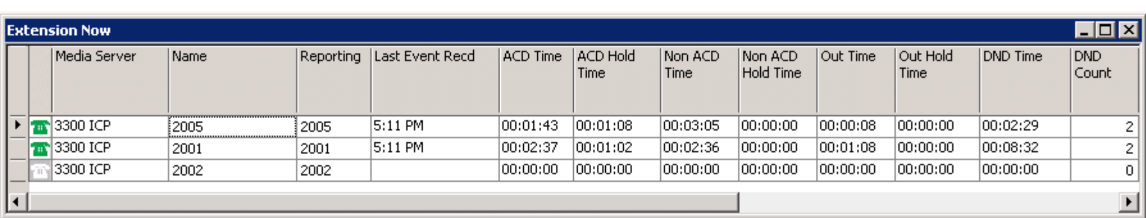


Extension Now

The Extension Now monitor enables supervisors to view extension statistics in real time. The Extension Now monitor provides visibility to extensions. If an agent logs out of an extension displayed in this monitor, the extension will go out of service and will not be updated in real time. In the Extension Now monitor, you can specify which columns of statistics are displayed, rearrange columns, and sort individual columns in ascending or descending order. (See the following figure.)

NOTE: Extensions must be licensed to display statistics.

Figure 43: Extension Now monitor



Extension Now

Media Server	Name	Reporting	Last Event Recd	ACD Time	ACD Hold Time	Non ACD Time	Non ACD Hold Time	Out Time	Out Hold Time	DND Time	DND Count
3300 ICP	2005	2005	5:11 PM	00:01:43	00:01:08	00:03:05	00:00:00	00:00:08	00:00:00	00:02:29	2
3300 ICP	2001	2001	5:11 PM	00:02:37	00:01:02	00:02:36	00:00:00	00:01:08	00:00:00	00:08:32	2
3300 ICP	2002	2002		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0

Extension Now column heading definitions

The following table indicates the current status of the extension and describes the real-time and over-the-business-day Extension Now extension statistics.

Table 21: Extension Now extension statistic column headings (Sheet 1 of 2)

Term	Meaning
Media Server	The extension's media server
Name	The extension name
Reporting	The extension's reporting number **NOTE:** The extension reporting number is also its dialable number.
Last Event Recd	The most recent time an extension event occurred
ACD Time	The duration of ACD(Ring Group) interactions handled, from extension pickup to completion (not including hold time)
ACD Hold Time	The duration of time ACD(Ring Group) interactions spent on hold
Non ACD Time	The duration of Non ACD interactions handled, from extension pickup to completion (not including hold time)
Non ACD Hold Time	The total time for Non ACD calls put on hold
Out Time	The number of outbound calls made by the extension
Out Hold Time	The duration of time outbound calls spent on hold for extensions
DND Time	The duration of time where Do Not Disturb was the overriding state for the extension
DND Cnt	The number of times the extension entered the Do Not Disturb state
ACD Cnt	The total number of ACD(Ring Group) calls answered by the extension
Shrt ACD Cnt	The total number of ACD(Ring Group) calls answered by the extension that lasted less than the Short Handle parameter
ACD Hold Cnt	The number of times the extension put ACD(Ring Group) calls on hold
Non ACD Cnt	The total number of Non ACD calls answered by the extension
Non ACD Hold Cnt	The number of times Non ACD calls were put on hold
Out Cnt	The total number of outgoing calls the extension made
Out Hold Cnt	The total number of times the extension put outgoing calls on hold
Calls Per Hour	The average number of incoming ACD calls answered by the extension per hour since the extension was logged in

Table 21: Extension Now extension statistic column headings (Continued) (Sheet 2 of 2)

Term	Meaning
On Failover	Indicates whether or not the extension has failed over to the secondary media server
Not Present Time	The duration of time the extension was in service but not present in a Ring Group
Avg Handl	The average amount of time the extension spent handling ACD interactions (ACD Time divided by ACD Count, excluding ACD Hold Time)
Occp	The total time the extension spent in an occupied state (occupied state excludes idle time)

Viewing queue statistics

NOTE: If an agent fails to answer an ACD call after X seconds or X rings or refuses a voice interaction, the agent is placed in Reseize Timer state instead of System Make Busy state. This default behavior can be reset to place agents into System Make Busy state rather than the Reseize Timer state. The system then re-queues the call, in the same queue, and offers it to the next available agent.

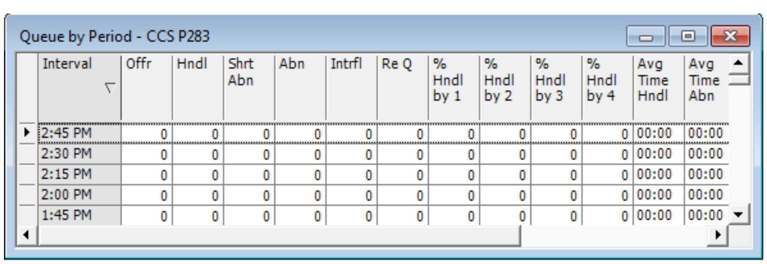
The following monitors display queue statistics:

- Queue by Period
- Queue Now
- Queue Group Now

Queue by Period

The Queue by Period monitor collates queue statistics by 15-minute intervals over a 24-hour period. The monitor refreshes each time there is a change in a statistic and each 15-minute interval. The Queue by Period monitor always displays the current 15 minute interval at the top of the monitor. You can specify which columns of statistics are displayed, rearrange columns, and sort individual columns in ascending or descending order. (See the following figure.)

Figure 44: Queue by Period



Queue by Period column heading definitions

The following table describes the Queue by Period column headings.

NOTE: Statistics that do not support Ring Groups display as '0'.

Table 22: Queue by Period column headings (Sheet 1 of 3)

Term	Abbreviated Name	Meaning
Interval time	Interval	The 15 minute interval of time
Offered	Offr	The total number of calls offered to the queue during the 15-minute interval
Handled	Hndl	The total number of calls answered by members during the 15-minute interval
Short Abandoned	Shrt Abn	During the 15-minute interval, the total number of calls abandoned before the short abandon time configured against the queue in YourSite Explorer
Abandoned	Abn	The total number of calls abandoned during the 15-minute interval before being answered by members
Interflowed	Intrfl	The total number of calls interflowed during the 15-minute interval
Requeued	Re Q	The total number of calls re-queued during the 15-minute interval **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
% Handled by 1-4	% Hndl by 1-4	A count of all of the calls answered by the first, second, third, and fourth answer points during the 15-minute interval **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.

Table 22: Queue by Period column headings (Continued) (Sheet 2 of 3)

Term	Abbreviated Name	Meaning
#Handled by 1-4	# Hndl by 1-4	The number of calls answered by the first, second, third, and fourth answer points during the 15-minute interval **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Total Conversation Time	Ttl Conv Time	The total time members spent talking to callers during the 15-minute interval
Average Conversation Time	Avg Conv time	The average time members spent talking to callers during the 15-minute interval
Average Time to Handle	Avg Time Hndl	The average amount of time callers waited in queue before members answered their calls during the 15-minute interval
Average Time to Abandon	Avg Time Abn	The average amount of time callers waited in queue during the 15-minute interval before they abandoned their calls
Average Time to Interflow	Avg Time Intrfl	The average amount of time callers waiting in queue during the 15-minute interval before being interflowed
Service Level % Today	Scv Lvl % Tday	During the 15-minute interval, the percentage of calls answered within the Service Level Time specified for the queue
% Handled	% Hndl	During the 15-minute interval, the percentage of calls answered compared to the total number of calls offered to the ACD queue for the day

Table 22: Queue by Period column headings (Continued) (Sheet 3 of 3)

Term	Abbreviated Name	Meaning
Wrap Up	Wrap Up	The total time the agent spent in the Work Timer state during the 15-minute interval **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Make Busy	Make Busy	The total time the agent spent in the Make Busy state during the 15-minute interval **NOTE:** This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'.
Occupancy	Occp	The total time the queue members spent in an occupied state during the 15-minute interval (occupied state excludes idle time)

Using Contact Center Chat

Contact Center Client provides instant messaging capabilities for both supervisors and agents and is typically used by contact center employees only. Contact Center Chat provides the online chat presence of contact center employees, including Online, Offline, and Away. Agents can view the availability and presence of other contact center employees before they transfer calls or send online chat messages.

Using Contact Center Chat, you can communicate essential information to one or more agents, agent groups, or supervisors quickly and securely. You can coach agents and send timely messages, such as asking an agent to delay going on break when it is busy.

NOTE:

- You must have a security role that does not restrict you from gaining access to Contact Center Chat.
- You must log on to Contact Center Client in order to send and receive online messages.
- When you receive a message it is displayed immediately on top of all open windows.

Sending a Contact Center Chat message

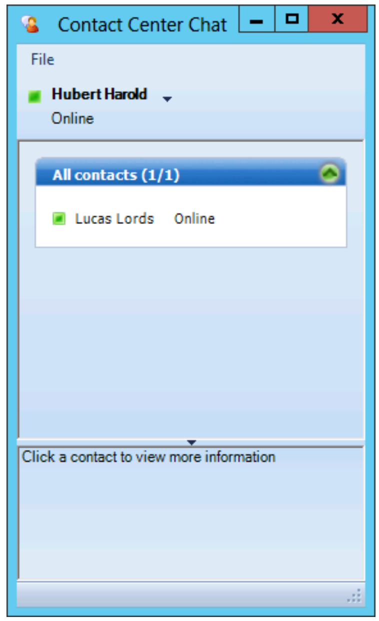
On an extension, agent, or employee monitor you can right-click an agent’s cell and click Send instant message to send an online message to the agent.

To send a chat message

1) Double-click your presence indicator in Contact Center Client's Status Bar.

   Contact Center Chat opens. (See the following figure.)

Figure 45: Contact Center Chat



2) Right-click a contact and select **Send an instant message**.

   Alternatively, double-click the contact.

   The Conversation window opens.

3) Type a message.

4) Click **Send**.

To send a chat message while viewing an extension, agent, or employee monitor

1) Right-click a cell in an open monitor and click **Send instant message**. Alternatively, double-click the presence indicator in the extension, agent, or employee's cell in the monitor.

   The Conversation window displays.

2) Type a message.

3) Click **Send**.

Adding someone to an interaction

To add someone to an interaction

1) On the **Conversation** window, click the **Add Participants** button to join this **conversation** icon.

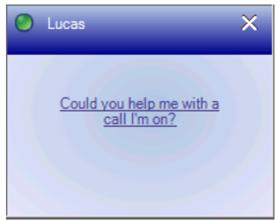
2) Double-click a contact to add the contact to the interaction.

3) Click **Send**.

Responding to a Contact Center Chat message

Agents and supervisors can receive Contact Center Chat messages only if they are logged on to Contact Center Client. When someone sends a Contact Center Chat message to you, the Conversation window opens and a desktop notification appears in the bottom-right of your monitor. The desktop notification shows the name and presence of the employee contacting you and their message. The following figure illustrates a chat notification.

Figure 46: Desktop Chat notification



To respond to a chat message

1) Type a message.
2) Click **Send**.

   Contact Center Chat sends your response to all chat session participants.

Using Contact Center Chat with Skype for Business

With the addition of Microsoft Skype for Business Server agents and supervisors use Skype for Business as their default instant messaging client. The presence of all company employees is natively delivered in Contact Center Client. Contact center employees can view the presence of both internal and external contacts to determine if they are available to communicate. In addition to Available, Offline, and Away, employees see In a Meeting, Busy, In a call, Do Not Disturb, Be Right Back, and other Skype for Business presence indicators.

NOTE: In order to use Contact Center Chat with Skype for Business, you must enable Contact Center Chat and have Skype for Business open and running.

If an agent views an employee on a real-time monitor and notes the employee is online, the agent can right-click the employee and send an instant message.

The following table provides details on the presence indicators that are available when Contact Center Client is used in conjunction with Skype for Business Client and Contact Center Chat with Skype for Business.

Table 23: Skype for Business presence indicator icons (Sheet 1 of 2)

2013 Presence Icon (Large)	2013 Presence Icon (Small)	Status Text	Description
		Available	The contact is online and can participate in interactions. Users can manually set this status, but the next automatic state change will override this setting.
		Busy	The contact is available, but is engaged by another activity. Busy contacts will not be routed ACD calls, but may receive Non ACD calls. Possible activities include the following: **In a Call**—the contact is in a phone, voice, or video interaction. **In a Meeting**—the Outlook calendar shows that the contact has a scheduled meeting. Users can manually set this status.
		Do Not Disturb	The contact is engaged by another activity and is unavailable. Contacts in Do Not Disturb will neither receive ACD or Non ACD calls. Users can manually set this status.

Table 23: Skype for Business presence indicator icons (Continued) (Sheet 2 of 2)

2013 Presence Icon (Large)	2013 Presence Icon (Small)	Status Text	Description
		Away / Inactive Be Right Back OffWork	The contact is likely unavailable. Possible reasons include the following: The contact's computer has been idle for more than the away time period setting (5 minutes by default). **NOTE:** By default, the transition from Available to Inactive occurs after 5 minutes. Then, after five more minutes, the status changes to Away if there is still no activity on the computer. *The contact's Outlook calendar or Out of Office Assistant indicates that they are out of the office.* *The contact is temporarily unavailable* **NOTE:** As soon as activity is detected on the contact's computer, Ignite automatically resets the presence status to the appropriate state. *The contact has locked their computer.* *The contact has manually set their presence to Away or Be Right Back.* *Users can manually set this status.* **NOTE:** When a user manually sets themselves as Away, they are still available to receive calls, such as from a transfer.
		Offline	The contact is not available. Possible reasons for this include the following: The contact has manually set their presence status to Appear Offline. The contact has not signed into Skype for Business. The contact has blocked you from seeing their presence status. Skype for Business is not running on the contact's computer.
		Presence unknown	Skype for Business cannot determine the status of the contact. This status is typically displayed because the contact's presence status is unavailable to Skype for Business, such as for a contact who is part of an organization that is not a federated partner.

Sending an instant message

On an agent or employee monitor, you can right-click an agent or employee's cell and click Send instant message to send an online message to the agent or employee. You can also send instant messages using Microsoft Skype for Business. Using Skype for Business, you can send instant messages to individuals or multiple contacts. After initiating an interaction, you can invite additional contacts to the interaction. For instruction in using Skype for Business, consult your Microsoft Skype for Business documentation.

NOTE: Supervisors send instant messages to contacts or groups of contacts using Contact Center Client.

To send an instant message while viewing agents on an extension, agent, or employee monitor

- Right-click a cell in an open monitor and click **Send instant message**.

  A Skype for Business Conversation window opens.

Hot desking profile settings

When an agent is configured as a Mitel hot desking agent, the agent can sit at any extension on the network and log on to the extension. After the agent is logged on, the agent takes control of the extension. The agent's Contact Center Client and soft phone real-time profile settings are available. Any previous associations with the extension are taken out of service. When an agent logs off, the agent disconnects from the extension and the default settings for the extension are restored automatically.

WARNING: If an external hot desk agent is using a personal phone to handle calls, incoming calls that are not answered could reach their personal voicemail.

Posting feedback and viewing our forums

Mitel has partnered with UserVoice, a third-party service, to host customer suggestions on https://micontactcenter.uservoice.com. When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Our forums enable you to send feedback directly to the people building the product. While we cannot comment on every suggestion, feedback is analyzed and considered for future releases.

NOTE: Please do not use the forums to submit product defects. To submit product defects, please contact your administrator or dealer.

Feedback can also be submitted directly to Mitel without posting the suggestion on the forums. For more general feedback, you can also provide a rating of your experience with MiContact Center Business.

NOTE: Please do not use feedback for requesting customer assistance. For assistance with MiContact Center Business, please contact your dealer or Mitel Customer Support.

To post feedback and view our forums

1) In YourSite Explorer, click **File > Feedback**.
2) Click **Got an idea? Tell us**.

   or

   Access the following URL: https://micontactcenter.uservoice.com.

To submit feedback directly

1) In YourSite Explorer, click **File > Feedback**.
2) Click **Contact Us**.

To rate your Mitel experience

1) In YourSite Explorer, click **File > Feedback**.
2) Click **Rate us**.

Viewing queue chart statistics

The following charts display queue statistics:

- Queue Now
- Queue Group Now
- Queue Performance by Period
- Queue Group Performance by Period

Queue Now and Queue Group Now

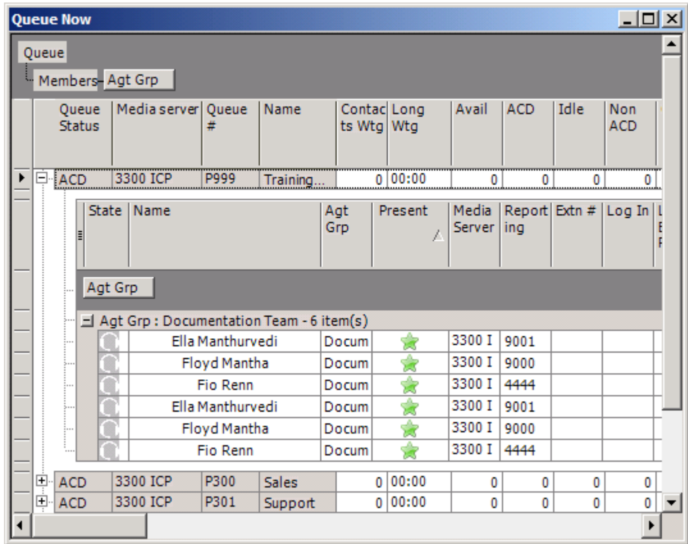
The Queue Now monitor enables supervisors to view queue statistics in real time, as well as expand individual queues in the monitor to view statistics on each queue's associated member agents or extensions. When you expand the Queue Now monitor to display the Name column, the monitor also displays member presence in the queue. Presence is indicated by a colored star in the Present column. A green star indicates the member is present in the queue. A gray star indicates the member is not present in the queue. A gray row indicates that the member is not logged in (for agents and hot desk users) or out of service (for extensions).

The Queue Group Now monitor enables supervisors to view aggregated statistics for Reporting, Virtual, and Unified queue groups in real-time, as well as expand individual queue groups in the monitor to view statistics for the queue group's associated queues.

On the Queue Now monitor, you can specify which columns of statistics are displayed, rearrange columns, and sort individual columns in ascending or descending order. You can expand a queue and view statistics on the members associated with the queue. (See the following figure.)

NOTE: Prior to Version 7.1, Queue Now monitors displayed the agent groups belonging to the queues with agent group statistics. As of Version 7.1, this functionality has been removed. Instead, queue members are grouped by agent group.

Figure 47: Queue Now



NOTE:

- Contact Center Client updates Longest Waiting statistics every fifteen seconds, or more frequently as records are received from the ACD routing system.
- If the ACD routing system has not updated MiContact Center Business with real-time statistics for Contacts Waiting and Agents Available within the last 90 seconds, question marks display in place of these statistics.
- Agents present in the queue and idle whose extensions are ringing are included in 'Available' statistics. Agents whose extensions are ringing are not included in Unavailable statistics.
- The Average Handling Time is the Average interaction Time plus the Average Hold Time. If the call is put on hold, transferred, or conferenced, these times are added to the Average Handling time value.
- If an agent fails to answer an ACD call after X seconds or X rings or refuses a voice interaction, the agent is placed in Reseize Timer state instead of System Make Busy state. This default behavior can be reset to place agents into System Make Busy state rather than the Reseize Timer state. The system then re-queues the call, in the same queue, and offers it to the next available agent.
- The abandoned media column in the Interactive Visual Queue monitor displays all abandoned calls. The abandoned column in the Queue Now monitor does not include short abandons as abandoned calls. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors.
- Statistics that do not support Ring Groups display as '0'.

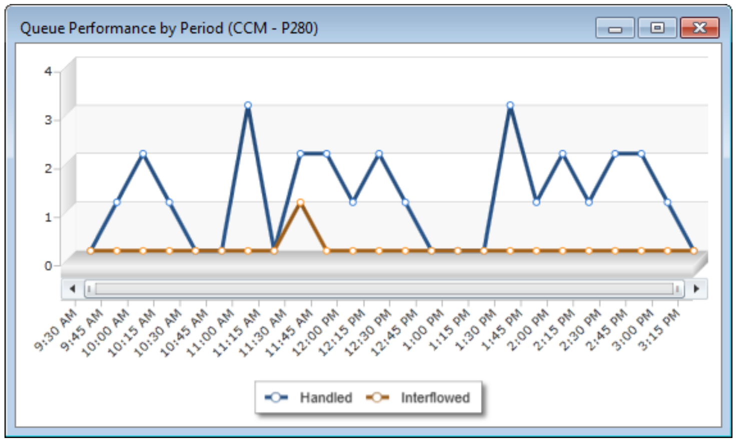
Queue Performance by Period and Queue Group Performance by Period

The Queue Performance by Period and Queue Group Performance by Period charts offer visual representations of Queue and Queue Group Performance by Period statistics, grouped by the type of statistic displayed. Three different series of statistics are available to view in charts:

- **Integer**—displays numerically-based real-time statistics
- **Percentage**—displays percentage-based statistics
- **Time**—displays time-based statistics

The following figure displays a Queue Performance by Period chart displaying the default statistics of the Integer series.

Figure 48: Queue Performance by Period chart



The Integer series shows the following statistics across 15 minute intervals for queues or queue groups:

- Handled (Default)
- Interflowed (Default)
- Offered
- Short Abandoned
- Abandoned
- Requeue
- # Handled by 1-4

The Percentage series shows the following statistics across 15 minute intervals for queues or queue groups, by default:

- % Handled by 1-4
- Service Level % Today
- % Handled

The Time series show the following statistics across 15 minute intervals for queues or queue groups, by default:

- Average Time to Handle
- Average Time to Abandon
- Average Time to Interflow
- Ttl Talk Time
- Average Talk Time
- Total work timer minutes
- Total make busy minutes
- Total occupancy minutes

For more information for the definitions of these statistics, see *"Queue by Period column heading definitions"*.

NOTE: The following statistics are for ACD path voice queues only and will not display information for Ring Groups:

- Requeue
- # Handled by 1, 2, 3, 4
- % Handled by 1, 2, 3, 4
- Total work timer minutes
- Total make busy minutes

Navigating charts

You can zoom in and out of charts to change how the data is displayed in the chart, expanding or compressing the displayed data. If the range of data displayed exceeds the boundary of the chart window in Contact Center Client, you can use the horizontal scroll bar to move back and forth across the displayed data.

To zoom in on a chart

1) Hold your mouse over the edge of the horizontal scroll bar until the cursor turns into a double-arrow (<->) icon.
2) Click and drag the edge of the horizontal scroll bar towards the opposite side of the scroll bar.
   The chart zooms in and the horizontal scroll bar shrinks in size.

NOTE: To undo the zoom function, click **Zoom Out**.

To zoom out of a chart

1) Hold your mouse over the edge of the horizontal scroll bar until the cursor turns into a double-arrow (<->) icon.
2) Click and drag the edge of the horizontal scroll bar and drag to zoom out.

To show the entire chart in the window

- If you are zoomed in, in the chart window click **Show All**.

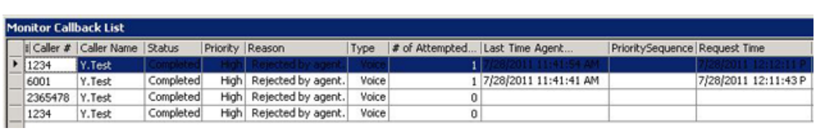
To scroll across the chart

- Click and drag the horizontal scroll bar in the direction you wish to scroll the chart.

Viewing callback lists with the Global callback monitor

When licensed for IVR, the Global callback monitor enables you to monitor callback states in real time and displays the callbacks currently available. Using the Global callback monitor, you can requeue and delete callbacks. (See the following figure.)

Figure 49: Global callback monitor



To access the global callback monitor

1) Click the **Real Time** tab in the Contact Center Client ribbon.
2) Click the **Callbacks** icon.
   The Monitor Callback List displays.
   The following table describes the Global callback monitor column headings.

Table 24: Global callback column headings (Sheet 1 of 2)

Column heading	Definition
Caller number	the phone number provided by the caller
Caller name	the name of the caller
Status	the state of the callback — new request, in progress, requeued, completed, unknown
Priority	the importance level of the callback. Callback priority levels are: • Voice — Normal • Web — Normal • Caller abandoned — Low
Type	the type of callback — voice, web, or caller abandoned
Reason	lists why the callback is in a particular status
Attempted Calls to Agent	the number of times the callback was offered to an agent in queue
Last Time Agent Attempted	the last time the agent attempted the callback
Request Time	the specific time at which the callback is scheduled to be processed; this field is populated when the callback is requeued
Time Received	the specific time the caller submitted the callback request
Web IP Address	the IP address of the caller who submitted the callback request
Last Attempted Call to Client	the specific time the last callback attempt to the caller was made
Attempted Calls to Client	the number of times the callback was attempted
Client Available From	the earliest time the caller is available to receive the callback
Client Available To	the latest time the caller is available to receive the callback
ANI	the phone number of the caller
DNIS	the phone number the caller dialed
Dialable	the dialable number of the device that will handle the callback

Table 24: Global callback column headings (Continued) (Sheet 2 of 2)

Column heading	Definition
Device Name	the name of the device that will handle the callback
Device Type	the type of device that will handle the callback — agent,or queue, or extension
Recorded Message	contains a hyperlink to the voice callback .wav file left by the caller
Area	the province/state or other area the call originated from
Country	the country the call originated from
Endpoint	the endpoint attempting to perform the callback
Region	the region the call originated from

Managing callbacks in the Global Callback monitor

The Global callback monitor enables users to requeue, reject, and delete callbacks within the monitor. Requeued callbacks are re-entered into their queue. Rejected callback are removed from the queue are will not be offered to employees. Deleted callbacks are removed from the monitor, but are not removed from the system.

Users can also adjust a callback's priority. Callback priority determines the order of which callbacks will be offered to agents. Callbacks are offered to agents in order of their priority and then by the longest waiting callback of that priority. For example, High priority callbacks are offered before Normal priority callbacks, even if the Normal priority callbacks have been in queue longer.

The following procedures explain how to:

- Requeue a callback
- Reject a callback
- Delete a callback
- Change a callback's priority

To requeue a callback

1) Right-click a callback and select **Requeue**.
2) Select **Yes**.

To reject a callback

1) Right-click a callback and select **Reject**.
2) Select **Yes**.

To delete a callback

1) Right-click a callback and select **Delete**.
2) Select **Yes**.

To change a callback's priority

- Right-click a callback and select **Change priority > [priority level]**.

Viewing ports

NOTE:

- You can monitor port states in real time and view currently executing workflows.
- You can select the ports you want to monitor individually or by hunt group.
- You can remove ports from Do Not Disturb.

The Port Status monitor displays port information.

Port status monitor

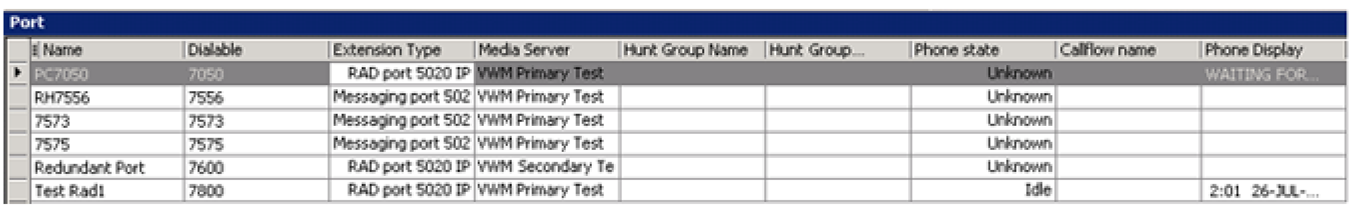
The Port Status monitor enables you to monitor port states in real time and displays the workflows that are currently executing on ports. Using the Port Status monitor, you can take ports out of Do Not Disturb and playback historical port events in Auditor mode. (See the following figure.)

To access the port status monitor

1) Click the **Real Time** tab in the Contact Center Client ribbon.
2) Click the **Ports** icon.

   The Port status monitor displays.

Figure 50: Port status monitor



Port

Name	Dialable	Extension Type	Media Server	Hunt Group Name	Hunt Group...	Phone state	Callflow name	Phone Display
PC7050	7050	RAD port 5020 IP	VWM Primary Test			Unknown		WAITING FOR...
RH7556	7556	Messaging port 502	VWM Primary Test			Unknown		
7573	7573	Messaging port 502	VWM Primary Test			Unknown		
7575	7575	Messaging port 502	VWM Primary Test			Unknown		
Redundant Port	7600	RAD port 5020 IP	VWM Secondary Te			Unknown		
Test Rad1	7800	RAD port 5020 IP	VWM Primary Test			Idle		2:01 26-JUL-...

The following table describes the Port Status monitor column headings.

Table 25: Port Status column headings (Sheet 1 of 2)

Column heading	Definition
Name	the name of the port
Dialable	the port's dialable number
Extension Type	the type the extension — RAD, messaging, callback, or UPiQ
Media Server	the media server to which the port is associated
Hunt Group Name	the name of the hunt group the port is associated with. A port can be associated with more than one hunt group
Hunt Group Dialable	the dialable number of the hunt group

Table 25: Port Status column headings (Continued) (Sheet 2 of 2)

Column heading	Definition
Phone state	the state of the phone — idle, dialing, talking, ringing, or unknown
Workflow name	the name of the executing workflow
Phone Display	displays the MiAUDIO state (that is displayed on the phone)
ANI	the phone number of the caller
DNIS	the phone number dialed by the caller
Redirect	the number of the device the call was directed from

Viewing webpages

While using Contact Center Client, you can view webpages using the Web browser monitor.

To view a webpage within Contact Center Client

1) Click the **Real Time** tab in the Contact Center Client ribbon.
2) Click the **Web** icon.
   The Web Browser Properties window opens.
3) After **Monitor title**, type a name for the monitor.
4) After **Start URL**, type the address of the website to view.
   NOTE: The website address must begin with http:// or you will not be able to view the monitor.
5) Optionally, select a value for the Web Browser **Refresh Rate**.
6) Click **OK**.

Viewing historical real-time events with Auditor

Using Auditor you can view historical, multimedia real-time events, at your own pace. Auditor makes it easy for you to analyze when and why past service problems occurred. By understanding the series of events you can prevent such issues from recurring.

For example, you notice that on July 15 you have 12 interactions abandon between 10:00 AM and 10:15 AM. You can review the interactions and the agents' actions on that date for that time period with Auditor. Did all of the interactions arrive at the same time? Did all of the agents go on break at the same time? If all of the interactions arrived at once, you need to schedule more people. If all of the agents went on break at the same time, you need to adjust their break schedule.

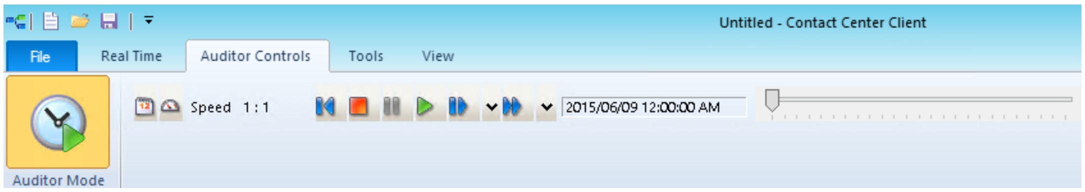
Using Auditor you can also track when employees log on and log off the system. It is easy to determine if any of the employees consistently start late or finish early.

With Auditor, you can use existing profiles, including alarm thresholds, when viewing past days run in real time.

Your access to Auditor is determined by administrator-set security roles.

The first toolbar consists of real-time monitors that provide information on agent availability, queue statistics, and graphic displays on queues. (See the following figure.)

Figure 51: Auditor toolbar



Auditor icons

Using Auditor's second toolbar you select the date of the historical real-time events that you want to view and the speed at which to play the events. The icons are described in the following table.

Table 26: Auditor Icons (Sheet 1 of 3)

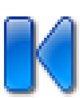
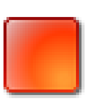
Icon	Term	Meaning
	Calendar	You can select the date of the historical real-time events that you want to view by clicking the calendar.
	Speed of audit	The Speed of audit is expressed as a ratio of real-time to play speed. You can select the speed from a list of ratios that opens when you click the clock: 1:1, 1:2, 1:5, 1:10, 1:30, 1:60, and 1:120. If you select the ratio1:1, it will take you one second to view one second of the past day. If you select 1:60, it will take you one second to view one minute of the past day.
	Rewind	If you click Rewind when the play is stopped, you jump back to the beginning of the day.
	Stop	You can stop the real-time historical events from playing, and jump back to the beginning of the day, by clicking Stop.

Table 26: Auditor Icons (Continued) (Sheet 2 of 3)

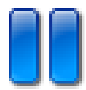
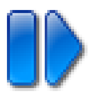
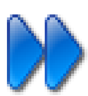
Icon	Term	Meaning
	Pause	You can pause the real-time historical events by clicking Pause.
	Play	You can play the real-time historical events by clicking Play.
	Step forward	You can select the increment (in seconds) you will advance from a list that opens when you click the down arrow to the right of Step forward: 1 sec, 2 sec, 5 sec, 10 sec, 15 sec, 30 sec, and 45 sec. If you select 30 seconds, then when the play is stopped, you can step forward in 30 second increments each time you click Step forward. When you reach the end of data for that day, you will automatically jump to the end of the day.
	Jump forward	You can select the increment (in minutes) you will advance from a list that opens when you click the down arrow to the right of Jump forward: 1 min, 2 min, 5 min, 10 min, 15 min, 30 min, and 60 min. If you select 10 minutes, then when the play is stopped, you can jump forward in 10 minute increments each time you click Jump forward. When you reach the end of data for that day, you will automatically jump to the end of the day.

Table 26: Auditor Icons (Continued) (Sheet 3 of 3)

Icon	Term	Meaning
	Slider	As you view the events of the day, the slider indicates the time at which the events occurred. The length of the slider represents the length of the day for which you are viewing historical real-time events.

Starting and using Auditor

You start Contact Center Client to gain access to Auditor functionality.

To view historical real-time events, you must

1) Start Contact Center Client.
2) Open the grids in which you want to view historical events.
3) Start Auditor.

NOTE: If you are using the Contact Center Client marquee, Contact Center PhoneSet Manager, Contact Center Softphone, or Interactive Visual Queue applications (which function in real time only), open Auditor in another instance of Contact Center Client.

To start and use Auditor

1) In the Contact Center Client ribbon, click **Auditor Controls**.
2) Click **Auditor Mode** in the toolbar ribbon.
   The Auditor toolbar displays.
3) Click the calendar icon and select a date.
   The date displays on the left of the slider.
4) Click the speed icon and select the speed of the audit.
   The speed of the audit, expressed as a ratio of real time to play speed, displays on the right of the speed icon.
5) Move the slider to select the time of day at which you want to start monitoring.
6) Click the play button to play the real-time events of the selected date.
   The historical real-time events play at the speed you selected.

Viewing and customizing real-time monitors

NOTE:

- Contact Center Client has a tabbed interface for managing and arranging windows. You can dock themonitors, displaying them on overlapping tabbed panels to maximize real estate. This enables you to readily navigate between monitors.

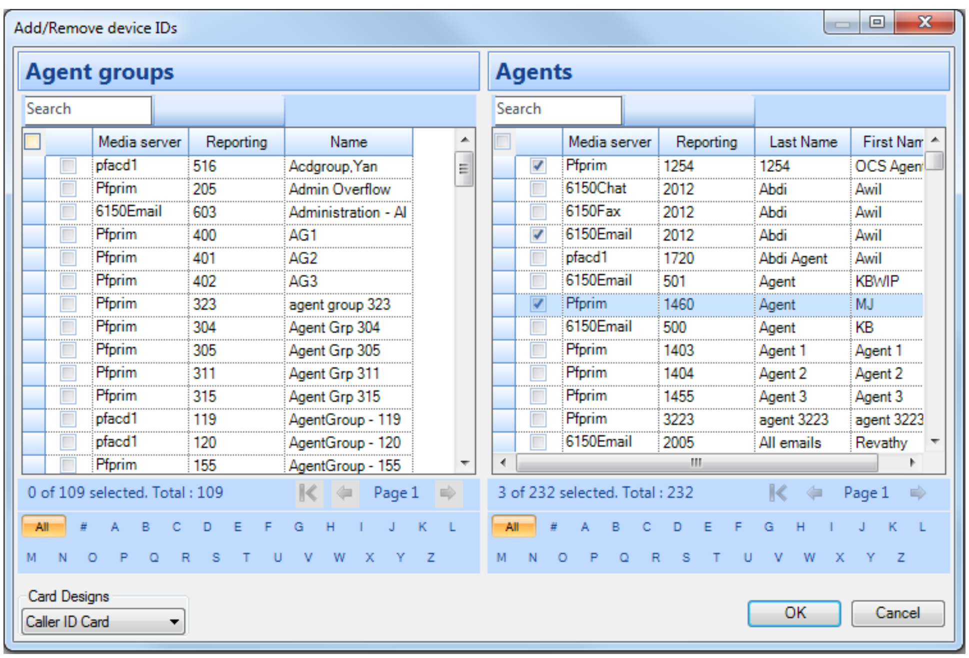
- You can save threshold settings and display characteristics you define for monitors. When you click File > Save, Contact Center Client saves all open monitors under one profile name. You can click File > Open to open another profile, or File > New to create a new profile.

Opening monitors

To open a monitor in Contact Center Client

1) In the Contact Center Client ribbon, click **Real time** to view the Contact Center Client monitor icons.
2) In the **State by Position** column on the ribbon, click **Agent**.
   This selects the Agent State by Position monitor and the Add/Remove device IDs window opens. See the following figure.
3) Under **Agent groups**, select agent groups to monitor and/or under Agents, select agents to monitor.
4) Under **Card designs**, select a card design.
   Card designs specify the information displayed on extension, agent, and employee monitors.
5) Click **OK**.

Figure 52: Add/Remove devices



Docking monitors

You can dock monitors and readily navigate between them. You can dock a monitor to the top, bottom, left, or right of another monitor. Alternatively, you can dock a monitor on the top, bottom, left, or right side of the Contact Center Client window. You can dock monitors on top of one another, displaying them on overlapping tabbed panels to maximize real estate.

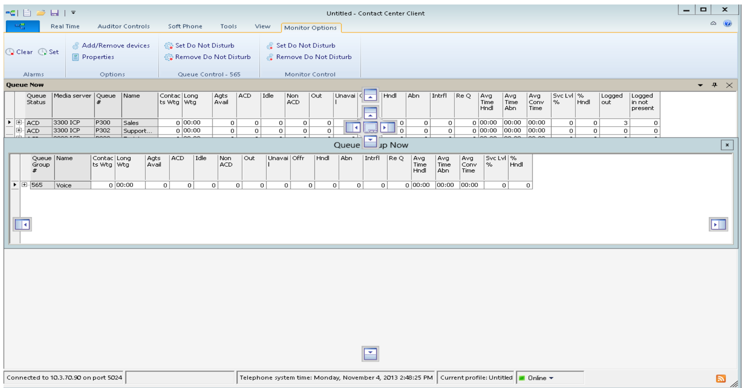
To dock a monitor on top of another monitor

1) Right-click the title bar of an open monitor and select **Dock**.
2) Repeat step 1 for all open monitors.

   Click the title bar of a monitor and drag the monitor on top of a second monitor placing your cursor in the center of the four-headed arrow that displays.

   See the following figure.

Figure 53: Docking monitors

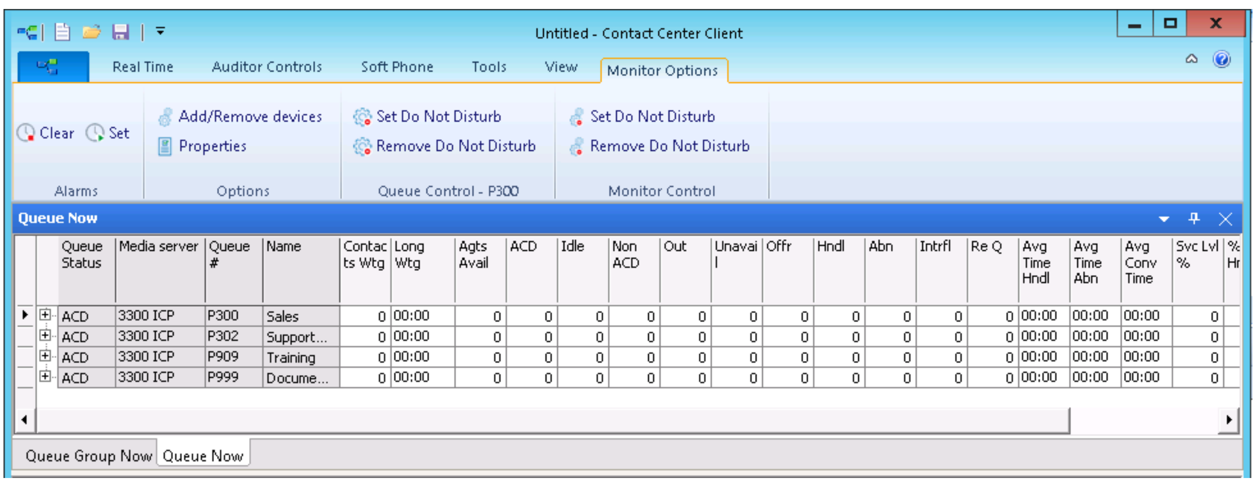


3) Release the mouse button.

   Your monitors are displayed on overlapping tabbed panels.

   See the following figure.

Figure 54: Docked monitor



Adding and removing devices

You can add and remove devices from all of the Contact Center Client monitors except for the chart monitors.

To add devices to the bottom of a monitor

1) Right-click an open monitor and click **Add/Remove devices**.
2) Under **Agent/Employee/Queue groups**, select additional agent, employee, or queue groups to add to the monitor, or under **Agents/Employees/Queues**, select additional agents, employees, or queues to add to the monitor.

3) Click **OK**.

On the State by Position monitors a blank row of cells separates the original agents from those you just added. To remove the blank row you must sort the monitor.

See "Sorting monitor devices".

To remove devices from a monitor

1) Right-click an open monitor and click **Add/Remove** devices.
2) Under **Agents/Employees/Queues**, clear the check boxes of the agents, employees, or queues to be removed.
3) Click **OK**.

NOTE: You can alternatively add and remove devices via the Monitor Options tab in the Contact Center Client ribbon for the Queue by Period, Queue Now, and Queue Group Now monitors.

Sorting monitor devices

When you select devices to display on a monitor, you can specify the devices be sorted by media server (on agent monitors only), ID or name (alphabetically) in ascending or descending order. When the monitor opens, the devices display in the order you selected.

To sort the devices displayed on a monitor

- In the left pane of the **Add/Remove devices** window, click **Media server** to sort the members by media server, click **Name** to sort the members alphabetically, or click **Reporting** to sort the members by ID, in either ascending or descending order.

You can sort information by state, name, or agent ID, or extension on the State by;Position monitors.

To sort agents or employees by state

- Right-click a monitor and click **Sort monitor > By state**.

If you sort agents by state, Contact Center Client displays the agents by state and time in state across the monitor in the following order:

- Ringing
- ACD
- ACD Hold
- Idle
- Non ACD
- Non ACD Hold
- Outbound
- Outbound Hold
- Do Not Disturb
- Make Busy
- System Make Busy
- Work Timer
- Unknown

- Logged Off

To sort agents or employees by name

- Right-click a monitor and click **Sort monitor > By name**.

To sort agents or employees by agent ID

- Right-click a monitor and click **Sort monitor > By agent ID**.

To sort agents or employees by extension

- Right-click a monitor and click **Sort monitor > By extension**.

Rearranging cells

You can rearrange cells on the State by Position monitors.

To rearrange cells

- On an open monitor, drag a cell to a different position on the monitor.

You can rearrange columns on the Agent Shift, Queue by Period, Queue Now, and Queue Group Now monitors.

To rearrange columns

1) Right-click an open monitor and click **Properties**.
2) Click the **Layout** folder.
3) Click **Column** order.
4) Click a column header and click the up or down arrow key to change the position of the column relative to other columns on the monitor.

NOTE: You can alternatively rearrange cells via the Monitor Options tab in the Contact Center Client ribbon for the Queue by Period, Queue Now, and Queue Group Now monitors.

Setting monitor dimensions

You can specify the numbers of rows and columns of cells to display on the State by Position monitors.

To set table dimensions

1) Right-click a monitor and click **Set table dimensions**.
2) After **Columns**, type a number.
3) After **Rows**, type a number.
4) Click **OK**.

   Columns or rows are added or deleted from the monitor. You can redistribute the cells using a drag-and-drop operation.

To size the table to fit the frame

- Right-click in any real-time monitor and select **Size table to frame**.

Hiding monitor columns

On the Agent Shift, Queue by Period, Queue Now, and Queue Group Now monitors, you can hide specific columns of statistics.

To hide columns

1) Right-click an open monitor and click **Properties**.
2) Click the **Layout** folder.
3) Click **Column** order.
4) In the **Visible** column, clear the check boxes of the columns you want to hide from view.

NOTE: You can alternatively hide monitor columns via the Monitor Options tab in the Contact Center Client ribbon for the Queue by Period, Queue Now, and Queue Group Now monitors.

Filtering device variables

On the Queue Now, Agent Shift, Queue by Period, and Queue Group Now monitors, you can filter specific device variables. For example, on the Queue by Period monitor, you could filter the Calls Offered variable and display statistics for the intervals during which the queue was offered five or more calls.

To filter device variables

1) Right-click a monitor and click **Filter device variables**.
2) Click **Filter data to show**, select a variable, select an operand, and type a number.
3) Click **OK**.

   A subset of the data is displayed based on the conditions defined in the filter.

Configuring chart characteristics

Individual charts have a range of configurable characteristics and options that enable users to customize their chart display.

You can right-click charts to access the following options or select them via the Chart Options tab:

- Change the chart types
- Configure the legend
- Configure the color scheme
- Define queue chart properties
- Enable points labels
- Modify Properties

Changing chart type

Contact Center Client enables you to configure the type of chart, either column or line, used for your Queue and Queue Group Performance by Period charts.

Queue and Queue Group Now charts display as bar charts.

1) Right-click on an open By Period chart and click **Chart Type**.
2) Select the type of chart you want your chart to display.

NOTE: Alternatively, you can change the chart type by selecting an open By Period chart, and choosing **Column** or **Line** from the drop-down list beside **Type** in the Chart Options tab.

Configuring the legend

You can choose if your chart has a legend, as well as configure where the legend displays.

To configure the legend

1) Right-click on an open queue chart and click **Legend box**.
2) Select or deselect **Enabled** to either display or remove the legend.
3) Right-click on an open queue chart and click **Legend box**.
4) Click **Left**, **Top**, **Right**, or **Bottom** to determine where you want the legend box to display.

NOTE: Alternatively, you can configure the legend by selecting an open queue monitor and accessing options from the **Legend** section of the **Chart Options** ribbon.

Configuring the color scheme

You can select the color scheme for the chart.

To configure the color scheme for a chart

1) Right-click on an open queue chart and click **Color**.
2) Select the color scheme you want to apply to the chart from the list.

NOTE: Alternatively, you can configure the color scheme by selecting an open queue chart and selecting color options from the drop-down list beside **Color** in the **Chart Options** ribbon.

Defining queue chart properties

Under Chart properties, you can select general chart characteristics, such as colors and stacked effects. You can define series characteristics, such as the type of chart, the fill properties, and the shape of the bars. In addition, you can define y axis characteristics.

To define queue chart properties

1) Right-click an open queue monitor and click **Chart properties**.
2) On the **General** tab, specify general chart characteristics (colors, effects, and 3D).
3) Click the **Series** tab.
4) Specify series characteristics (chart style, fill style, bar type, and border style).
5) Click the **Y Axis** tab.
6) Specify axis scale characteristics, label characteristics, and the width and color of the axis line.
7) Click **OK**.

NOTE: Alternatively, you can configure queue chart properties by selecting an open queue monitor and clicking **Properties** located in the **Chart Options** ribbon.

Enabling point labels

You can enable labels for each point in your chart.

To enable point labels

- Right-click on an open queue chart and click **Points labels**.

NOTE: Alternatively, you can enable point labels by selecting an open queue chart and clicking **Enabled** in the **Points Label** section of the **Chart Options** ribbon.

Modifying Properties

Properties controls the way chart data displays. Under Properties, you can

- Specify the queue chart title
- Highlight statistics
- Configure 2D and 3D displays
- Animate charts
- Select call statistics to display
- Create and modify Constant lines

NOTE: You can either right-click an open queue chart to modify properties or select an open queue chart and choose options via the Properties section of the Chart Options tab.

Specifying the queue chart title

Under Properties, you can specify the title of the queue chart.

To specify the queue chart title

1) Right-click on an open queue chart and click **Properties**.
2) After **Monitor title**, select and delete the old chart title and type a new name for the queue chart.
3) Click **OK**.

Highlighting statistics

Under Properties, you can enable the highlight feature. When the highlight feature is enabled, and when you move your cursor over a bar representing a specific call statistic, that bar is highlighted and the other bars, representing other call statistics, are dimmed.

To highlight statistics

1) Right-click on an open queue chart and click **Properties**.
2) Expand the **Chart properties** tree and click **General**.
3) Select the **Highlight** check box.
4) Click **OK**.

Configuring 2D or 3D chart displays

Under Properties, you can configure whether your chart displays bars in 2D or 3D. By default, your charts display in 3D.

1) Right-click on an open queue chart and click **Properties**.
2) Expand the **Chart properties** tree and click **General**.
3) Select the **3D** check box to enable or disable 3D charts.
4) Click **OK**.

Animating charts

Under Properties, you can enable the animated feature. When the animated feature is enabled, changes to chart values actively display. The animated feature is disabled by default.

CAUTION: Enabling the animated feature will result in additional CPU load on the affected workstation.

To animate charts

1) Right-click on an open queue chart and click **Properties**.
2) Expand the **Chart properties** tree and click **General**.
3) Select the **Animated** check box.
4) Click **OK**.

Selecting call statistics to display

Under Properties, you can select call statistics to display. For example, you can add Calls Waiting, Agents Available, Idle, and Requeued statistics to the Queue Group Now (Integer) chart.

To select call statistics to display

1) Right-click on an open queue chart and click **Properties**.
2) Expand the **Chart properties** tree and click **Series data**.
3) Select the **Series data type** radio button to define the types of data visible in the chart.
   – Integer
   – Percentage
   – Time
4) If you are selecting call statistics for a Queue or Queue Group Performance by Period chart, click **Time Interval**. Select the radio button for the interval you want to use and set the time.
5) Under **Visible**, select the check box of the data you want to add to the chart.
6) Alternatively, under **Visible**, clear the check box of the data you want to remove from the chart.
7) Click **OK**.

Creating and modifying Constant lines

Under Properties, you can configure Constant lines. Constant lines are horizontal lines you configure to display across your chart at set values on the Y-axis, enabling you to clearly see how the data being displayed in the chart meets with desired values.

To create Constant lines

1) Right-click on an open queue chart and click **Properties**.
2) Click **Chart properties**.
3) Click **Constant lines**.
4) Click **Add**.
5) Click in the **Color** box to choose a color.
   NOTE: The default constant line color is red.
6) After **Text**, type the name you want to display beside the constant line in the chart.
7) After **Value**, type the value you want the constant line to mark.
8) After **Width**, select the thickness of the line.

9) Click **OK**.

The Constant line will be added to the list of active Constant lines.

To modify a Constant line

1) Select the Constant line you want to modify and click **Edit**.
2) After **Text**, type the name you want to display beside the Constant line in the chart.
3) After **Value**, type the value you want the Constant line to mark.
4) After **Width**, select the thickness of the line.
5) Click **OK**.

To delete a Constant line

- Select the Constant line you want to delete and click **Delete**.

Setting alarms

You can define alarms to alert you to significant changes in contact center activity. Using the alarms, you specify performance thresholds for contact center elements, such as queues and agents, and customize the visual, auditory, or email delivery of alarms. If any availability or performance issues arise, your alarms deliver a notification enabling you to instantly change agent and queue availability to adjust to unplanned call volumes.

Client alarms are specific to each computer. To notify you that performance thresholds are not being met, you can configure alarms so that

- Monitor cells and statistics change color.
- A pop-up notification appears on your desktop.
- A sound prompt, such as a beep or .wav file, plays.
- You are notified by email.
- Contact Center Client appears on top of all open applications.

To configure alarms for real-time monitors

1) Determine whether you want to monitor all extensions, or some extensions.
2) Add performance variables to monitor.
3) Specify alarm threshold .

Adding performance thresholds

To add performance thresholds so you can monitor alarms

1) Right-click a monitor and click **Set alarms**.

Alternatively, select an open monitor and click Set alarms in the Alarms column, found in the Monitor or Chart Options tab in the Contact Center Client ribbon.

The Set alarms window appears.

NOTE: You can select the **Apply the alarm thresholds to all devices displayed on the monitor** check box to apply the threshold settings for performance variables across all queues or agents. Alternately, you can select **Apply the alarm thresholds to a specific list of devices** to apply the threshold settings for a performance variables to a list of queues or agents.

2) Under **Devices**, select one or more queues or agents or select the **Select all** check box to select all queues or agents.
3) In the **Performance variables** list, select a variable.
4) Under **Alarm Thresholds**, click **Add threshold** and type a value for the upper boundary of the threshold.

   The lower boundary cannot be modified. The lower boundary of the next threshold is always slightly greater than the upper boundary of the previous threshold.
5) Click **OK**.

Specifying performance threshold colors

To configure performance threshold colors

1) For the alarm threshold for which you want to specify colors, under **Background**, click the arrow.

   A color palate appears.
2) Select a color.
3) Under **Font color**, click the arrow.

   A color palate appears.
4) Select the font color for the alarm threshold.
5) Click **OK**.

Specifying threshold notification

You can configure performance threshold sound and pop-up window notifications

To configure performance threshold sound notification

1) For the alarm threshold for which you want to be notified by a sound, under **Sound**, select the check box.

   The Sound window opens.
2) Specify the alarm triggering properties.
3) Specify the sound you want played when the alarm is triggered.
4) Click **Save**.

To configure performance threshold pop-up window notification

1) For the alarm threshold for which you want to be notified by a pop-up window, under **Pop-up**, select the check box.

   The Pop-up window opens.
2) After **Duration**, type the number of seconds you want the pop-up alarm to be displayed when threshold conditions are satisfied.
3) If you want to display the pop-up alarm on top of all of the other applications, select the **Keep this message visible on mouse over** check box.
4) Optionally, click the **Format font** button to specify font attributes for the pop-up alarm message.
5) In the text box, type the message for the performance threshold and click the **Add a variable** button to insert performance variables. (for example, type CW P001 = <calls waiting variable>).

6) Click **Save**.

To specify that Contact Center Client opens on top of all other applications when a performance threshold is satisfied

- For the alarm threshold for which you want to be notified, under **Bring to front**, select the check box.

To configure performance threshold email notification

1) For the alarm threshold for which you want to be notified, or notify others by email, under **Email**, select the check box.

   The Email window opens.

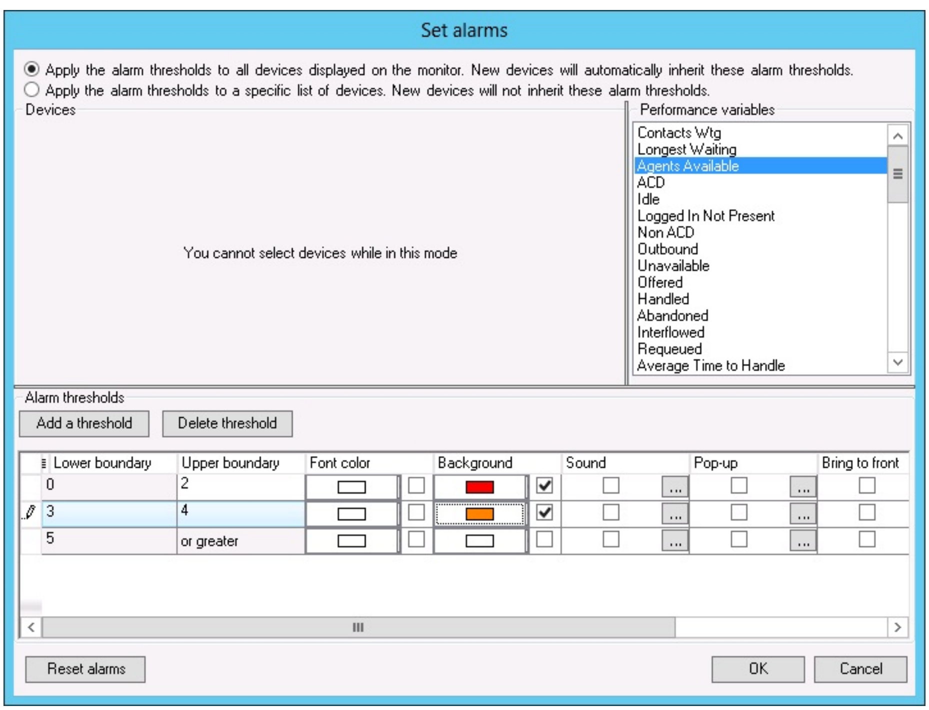
2) After **Distribution**, specify which contacts are to be notified by email when threshold conditions are satisfied.
3) After **Subject**, type the subject of the email to be sent (for example, type Calls Wtg in Sales Queue 1 >10!).
4) In the message box, type the body of the email.
5) Click **Save**.

Consider the threshold programming in the following figure. When the number of agents available in the technical support queue is between 0 and 2, the cell housing the Agents Available statistic is red. When the number of agents available is between 3 and 4, the cell turns orange. When the number of agents available is 5 or greater, the cell turns white. In addition, audible alarms and pop-up alarms display.

To clear any current client alarms in Contact Center Client

- Right-click the monitor and click Clear alarms.

Figure 55: Set alarms window



Customizing the information displayed on position and time monitors

On the agent, employee, and extension by position and by time monitors, real-time information is displayed in cells (cards). You can select from available card designs, or customize cards to display specific information.

When you first open an agent, employee, and extension monitor, you can select a card design on the Add/Remove device IDs window:

- The Classic card displays the agent state, time in the state, presence, agent/employee name, and agent login ID/employee ID, and extension number (or queue name for voice agents on ACD or on ACD Hold)) and presence.
- The Caller ID card displays the caller name and number (ANI), the number the caller/employee dials for incoming/outgoing calls, the state, time in the state, presence, agent/employee name, agent login ID/employee ID, and extension number (or queue name for voice agents on ACD or on ACD Hold.
- Custom cards you create and share

The Caller ID card is the default card design. You can use this card design, or select the Classic card or a customized card. You can create new card designs or copy existing card designs and modify them. For example, you can add or remove text and variables from cards and rearrange the information displayed. You can share card designs with other employees. When you select a card design for an agent, employee, or extension monitor, it is applied to all monitors of that type.

Selecting and customizing card designs

To select a card design

1) Right-click an open position or time monitor and click **Properties**.
2) Click **Layout > Card design**.
3) Under **Design name**, select a card design.
4) Click **OK**.

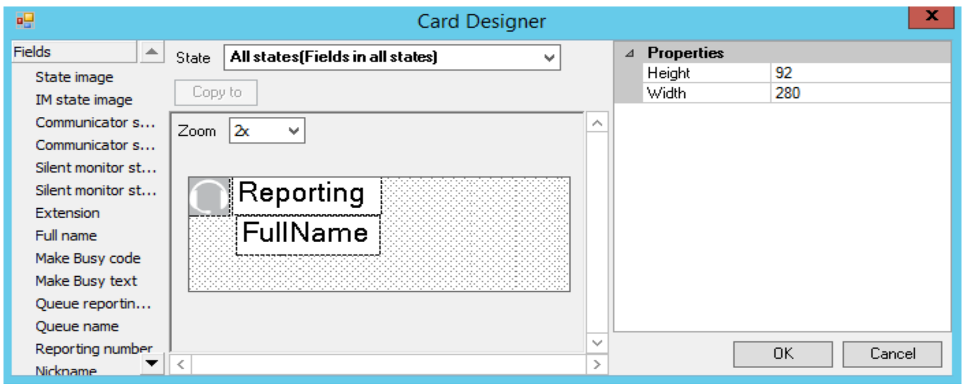
To customize cards for position and time monitors

1) Under **Card design**,
   – If you want to create a card design, click **New**.
   – If you want to edit an existing card design, select a card design and click **Edit**.
   – If you want to create a card design based on the Classic card, select it and click **Copy**.
2) On the **New card design** window, type the name of the new card design.
3) If you want to share the design with other agents, select **Share design**.
4) Click **OK**.
5) Select the card and click **Edit**.
   See the following figure.
6) After **State**, select a state for the card design.
   You can use the same card design for all states or you can customize cards for specific states, such as ACD, Idle, Make Busy, and Unknown.

7) Under **Fields**, select a field type and drag and drop it to the card design.
8) If you want to resize the field, click the field and use your pointer to move or resize the field.
9) If you want to change the properties for a field, click the field and change the properties in the right pane of Card Designer.
10) If you want to change the size of the card design preview, after **Zoom**, select a different magnification value from the list.
11) Add additional fields to the card.
12) Select **Copy** to if you want to copy the current design to the card of a different state.
13) Click **OK**.

    The new card design appears on the Card design list.
14) Click **OK**.

Figure 56: Card design window



Defining monitor styles

You can customize the appearance of individual monitor elements. For example, you can configure the font size and color of column headings or apply a skin of predefined colors and font attributes to the entire monitor.

To customize the appearance of monitor elements

1) Right-click an open monitor and click **Properties**.
2) Click **General > General settings**.
3) If you want to change the title of the monitor, after **Title**, type a name.
4) If you want to scroll horizontally on the monitor, select the **Enable horizontal scroll bars** check box.
5) If you want to scroll vertically on the monitor, select the **Enable vertical scroll bars** check box.
6) If you want to group monitor headings, select the **Enable grouping** check box.
7) If you want to apply a skin to the monitor, click **Layout > Monitor style**.
8) Click **Load style** and select a skin.
9) Otherwise, under **Properties**, manually configure the column settings, column font, row settings, and row-alternate settings.
10) Click **OK**.

Adding text to card designs

You can use a text box to add custom text to a card.

To edit text that you have added to a card

1) Select the text box.

   Properties appear on the right.

2) Under **Properties**, in the box to the right of **Text**, type the text to be added to the card.

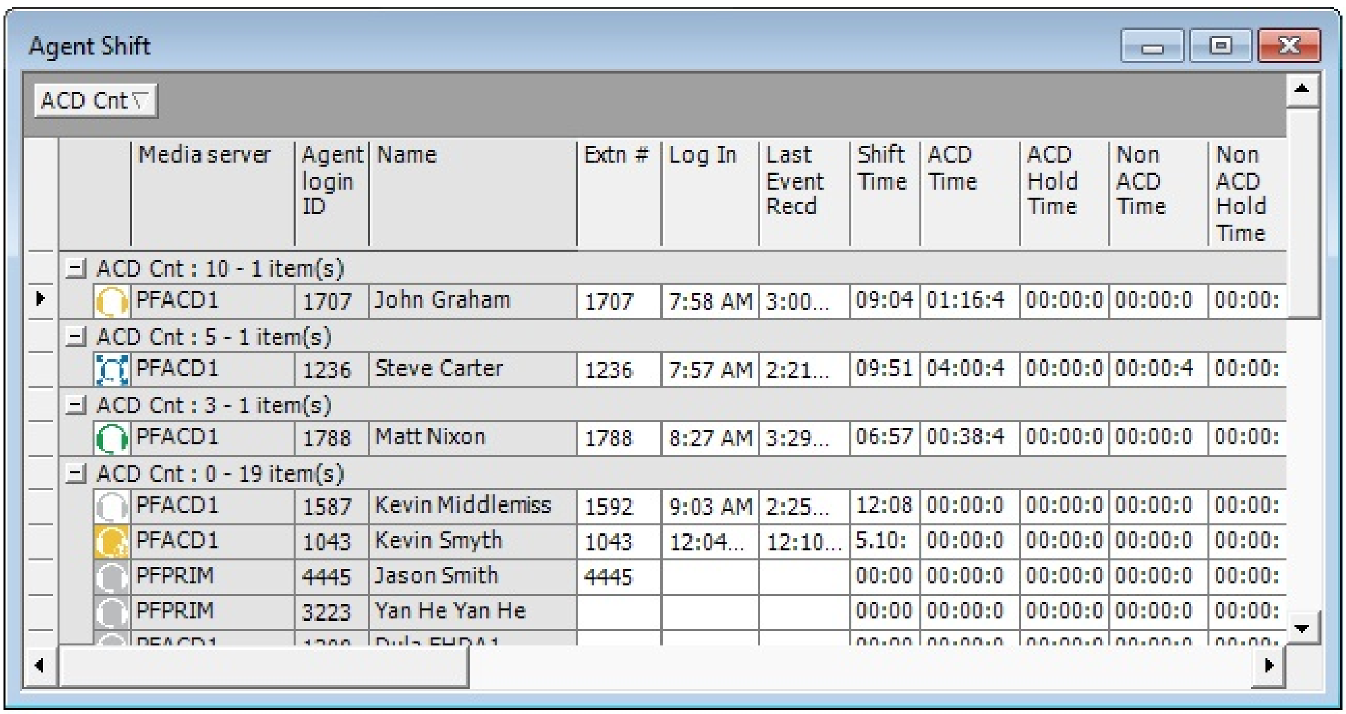
3) Click **OK**.

4) Click **OK**.

Grouping data

You can group rows of data in the Queue Now monitor, and other monitors that contain columns. For example, you can group the data by the ACD count statistic and readily see which agents handled the most calls, and which agents handled the least calls, as illustrated in the following figure.

Figure 57: Enable grouping



The Enable grouping option displays a grouping panel to which users drag columns. The grouping order determines the order in which the rows display.

To enable grouping

1) Right-click an open monitor and click **Properties**.

2) Select the **Enable grouping** check box.

3) Click **OK**.

   The monitor displays a grouping panel.

4) Drag a column heading to the panel to group by the column heading.

Building marquee monitors

You can build a marquee monitors to broadcast real-time statistics and messages and alarm on real-time contact center performance statistics. With marquee monitors and wall-mounted marquee displays, such as LCD monitors or LED reader boards, you can offer your supervisors and agents access to important contact center performance metrics.

To build a marquee monitor, you must

- Specify styles for the marquee monitor.
- Configure marquee text and variables.

Configuring marquee monitor styles

To specify attributes for the marquee background

1) Click the **Marquee** icon.

   The Configure marquee window appears.

2) Click **Add message**.

   The Add message window displays.

3) Type a name for the message.

4) Under **Position**, select **Top**, **Right**, **Left**, **Center**, or **Bottom** to specify how the message is to be displayed on the marquee.

5) Click **Format marquee**.

   The Format marquee window appears.

6) After **Background color**, select a color for the background.

7) After **Cell color**, select a color for the marquee cells.

8) After **Cell size**, specify a value for the size of the marquee cells.

9) After **Cell spacing**, select a value for the space between marquee cells.

10) To specify the marquee text font type and color, click **Format font**.

    The Font window displays.

11) Select font attributes.

12) Click **OK**.

13) If you want the message and the background of the message to be displayed using pixels, select the **Matrix style** check box.

14) Click **OK**.

15) Click **OK**.

    The marquee displays.

    NOTE: You must configure marquee text and variables. See *"Configuring marquee text and variables"*.

Configuring marquee text and variables

To configure text and variables for the marquee

1) Right-click the marquee and click **Configure marquee**.

   The Configure marquee window displays.
2) In the **Message editor** text box, type a message to display on the marquee (for example, type Calls Wtg =).
3) Under **Message editor**, click the **Add variable** button.

   The Add/Edit variable window displays.
4) Click **Add**.

   The Configure variable window displays.
5) Under **Variable types**, click the monitor type to which the variable applies.
6) Under **Variables**, click a variable.

   NOTE: The following queue variables will not supply information for Ring Groups:

   – % Handled by 1, 2, 3, 4

   – Dial Out of queue

   – Requeued

   NOTE: The Extension variable is available in the list, when you add this variable, this will be displayed blank in the marquee as extensions are not reported on a SIP platform.
7) Under **Devices**, select the check box of a device.
8) Under **Thresholds**, click **Add threshold** and specify a value for the upper boundary of the first threshold.
9) Click **OK**.
10) For the threshold, under **Variable**, select a color to be displayed in the marquee message string.
11) For the threshold, under **Message**, select a color for the text that will precede the variable in the marquee text string.
12) After **Type a name for the variable**, type a name.
13) Click **OK**.
14) On the **Configure marquee** window, in the **Message editor** text box, position your pointer where you want to add the variable.
15) You can add variables at the beginning, middle, or end of message strings.
16) On the **Add/Edit variable** window, double-click the variable to add it to the message string.

    *Click the **Add** variable button.*

    *The **Add/Edit** variable window displays.*
17) Click the **Configure transition effects** button and select the check boxes for the transition effects to be included.
18) Click **OK**.

    The marquee displays, showing the text you typed and a real-time value for the performance variable. You can define additional thresholds for the performance variable, and add additional variables to the marquee.

Employee and Agent control

Using Interactive Contact Center and Contact Center Client, you can control agents on the following monitors:

- Agent State by Position and Employee State by Position
- Agent State by Time and Employee State by Time
- Agent Shift

Agent control gives you control over individual agents. Monitor control gives you control over all of the agents on a monitor. All of the agents on the monitor are affected simultaneously by the action you take.

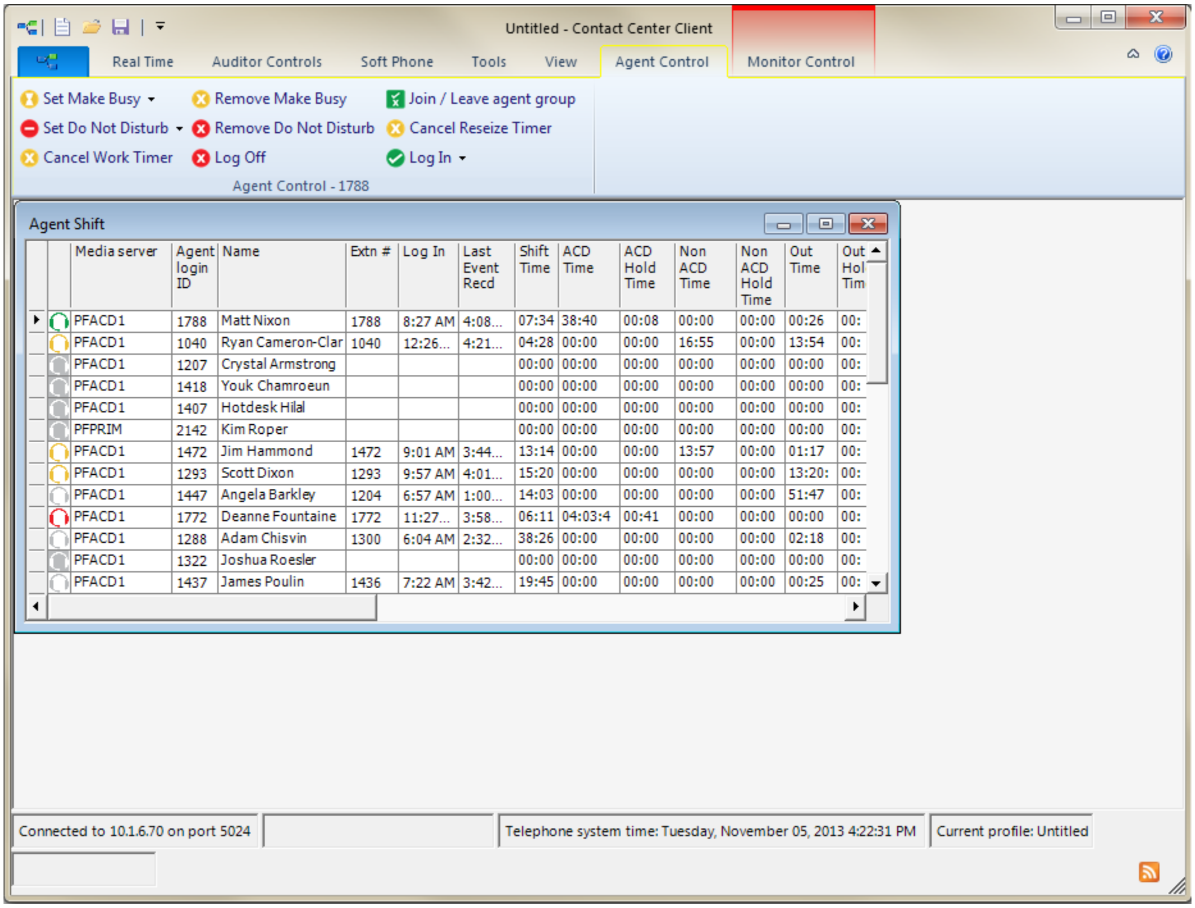
If you have Context Sensitivity enabled for monitors, the Agent Control and Monitor Control tabs display in the Contact Center Client ribbon when you have any of the above monitors open. You can perform actions using either a right-click and select method within the monitor or by selecting an agent or an empty cell (monitor control) and accessing the action menu in the Agent or Monitor Control tab views. (See the following figure.)

Using Interactive Contact Center and Ignite (WEB), you can control agents and employees in the following monitors:

- Employee State
- Agent State

NOTE: Context sensitivity and monitor control are not supported with Ignite (WEB). You can only alter the state for one employee or agent at a time.

Figure 58: Agent Shift - Agent Control tab options



Agents and Agent Group Presence

Agents can be assigned to multiple agent groups, which are associated with different queues. When agent groups are created, an employee's agents are assigned a default group presence, either Present or Absent. To handle interactions the employee can make themselves present in their agent groups using either Contact Center Client or Ignite.

It is important to note that agents may join or leave agent groups but not queues. Agents become absent from a queue indirectly if they leave all agent groups associated with that queue. An agent who is present in an agent group which is associated to all queues would be disassociated from all queues simultaneously if they became absent in their agent group

Hiding the Monitor control option

Interactive Contact Center enables you to manage the presence of all devices in a monitor using Monitor Device Control. If you do not want to use monitor control, you can hide this option so it is not accessible.

To hide the Monitor control option

1) In Contact Center Client, click **File > Options**.
2) Under **Device control**, clear the **Display monitor device control option** check box.
3) Click **OK**.

Logging on an agent - Contact Center Client

NOTE:

- An ACD Hot Desking Agent must enter an extension number each time the agents logs on to the ACD routing system using Interactive Contact Center. The agent cannot rely on the extension number last used when logging on. This is because the ACD data stream unifies the agent ID and the extension. After a Hot Desking Agent logs on or off of the ACD routing system using Interactive Contact Center, sometimes the Interactive Contact Center agent controls are not available to the agent for two to five minutes.
- You will be unable to log on an agent to the system if there are no available user licenses.
- If your contact center participates in the use of PINs, supervisors with the correct Class of Service do not require an agent's PIN to interactively log in a Hot Desking Agent.
- Depending on security roles and telephone switch settings, employees who are licensed as Advanced Supervisor or System Administrator may not be prompted to enter a PIN when logging into Interactive Contact Center, Softphone, or PhoneSet Manager.
- If a Hot Desking Agent logs into an extension that serves as the overflow point for a Ring Group, calls to that Ring Group will not be offered to the extension and will remain queued or ringing until abandoned or answered.
- Hot desking users logging into a Ring Group extension must also be a member of the Ring Group to ensure accurate reporting.

You log employee voice agents in and out in either an open Employee or Agent Monitor in Contact Center Client. Multimedia agents are not logged in with voice agents.

To log in an agent in an open Employee monitor

- Right-click the cell of an employee and click **Employee control > Log in > voice agent**. Alternatively, select the employee cell in an open monitor, click **Log** in from the **Employee Control** tab on the Contact Center Client ribbon, and select the voice agent.

  NOTE: When you log in an employee's voice agent, you must enter the extension for the agent. See the procedure below.

To log in an agent by extension in an open Employee monitor

1) Right-click the cell of an employee and click **Employee control > Log in > By extension**.
2) If the employee has multiple voice agents, select the agent to log in from the drop-down list.
3) Type the **Agent's extension**.
4) Click **OK**.

To log in an agent in an open Agent monitor

- Right-click the cell of a voice agent who is not logged into and click **Agent Control > Log in > voice agent**. Alternatively, select the agent cell in an open monitor and click **Log in** from the Contact Center Client ribbon.

  NOTE: When you log in a voice agent, you must enter the extension for the agent. See the procedure below.

To log in an agent by extension in an open Agent monitor

1) Right-click the cell of a voice agent and click **Agent control > Log in > By extension**.
2) If the employee has multiple voice agents, select the agent to log in from the drop-down list.
3) Type the **Agent's extension**.
4) Click **OK**.

Logging off an agent - Contact Center Client

You can log off an employee from all media in an Employee monitor or Agent monitor. Logging off an agent logs off the employee's voice agent and sets the employee's multimedia agents to Absent in all their agent groups. If the employee is logged into their soft phone in Contact Center Client, they will also be logged out of the soft phone.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To log off all of an employee's agents in an open Employee monitor

- Right-click the cell of an employee and click **Employee control > Log off**. Alternatively, select the employee cell in an open monitor and click **Log Off** from the **Employee Control** tab on the Contact Center Client ribbon.

To log off an agent in an open Agent monitor

NOTE: Logging off an employee's agent logs off all of the employee's agents simultaneously.

- Right-click the cell of an agent and click **Agent control > Log off**. Alternatively, select the agent cell in an open monitor and click **Log Off** from the **Agent Control** tab on the Contact Center Client ribbon.

To log off all employees' agents in an open Employee monitor

1) Right-click the monitor and click **Monitor control > Log off**.

   *Alternatively, click the **Monitor Control** tab in the Contact Center Client ribbon and select **Log Off**.*
2) Click **Yes**.

To log off all agents in an open Agent monitor

1) Right-click the monitor and click **Monitor control > Log off**.

   *Alternatively, click the **Monitor Control** tab in the Contact Center Client ribbon and select **Log Off**.*
2) Click **Yes**.

Joining and leaving agent groups - Contact Center Client

After logging into Contact Center Client, agents can use Interactive Contact Center to control their presence status in agent groups. Optionally, supervisors can use Interactive Contact Center to control the presence status of agents in specific agent groups.

NOTE:

- An agent's ACD hot desk line remains in service while they are logged in as an ACD hot desk user even if they are not present in any ACD groups and not receiving ACD calls.

To join an agent to or have an agent leave an agent group in an open Employee monitor

1) Right-click the cell of an employee and click **Employee control > Join/Leave Agent Group > [Agent]**.

   *Alternatively, select the cell of an employee and in the **Employee Control** tab of the Contact Center Client ribbon, click **Join/Leave agent group > [Agent]**.*

2) Select the agent group(s) to which you want the employee's agent(s) to join or deselect the agent group(s) to have the employee's agent(s) leave the agent groups.

3) Click **OK**.

To join an agent to or have an agent leave an agent group in an open Agent monitor

1) Right-click the cell of an agent who is logged on and click **Agent control > Join/Leave Agent Group**.

   *Alternatively, select the cell of an agent and click **Join/Leave Agent Group** from the Agent Control tab in the Contact Center Client ribbon.*

2) Select the agent group(s) to which you want the agent(s) to join or deselect the agent group(s) to which you want the agent(s) to leave.

3) Click **OK**.

Placing employees in Make Busy - Contact Center Client

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing employees into Make Busy places both employees and all of their agents into Make Busy.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To place an employee in an open Employee monitor in Make Busy

- Right-click the cell of an employee and click **Employee control > Set Make Busy >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Employee Make Busy >** reason code from the **Employee Control** tab in the Contact Center Client ribbon.

To place all employees in an open Employee monitor in Make Busy

1) Right-click the monitor and click **Monitor control > Set Make Busy >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Make Busy >** reason code from the **Monitor Control** tab in the Contact Center Client ribbon.

2) Click **Yes**.

To place an employee in an open Agent monitor in Make Busy

- Right-click the cell of an agent and click **Agent control > Set Employee Make Busy >** reason code. Alternatively, select the agent cell in an open monitor and click **Set Employee Make Busy >** reason code from the Agent Control tab in the Contact Center Client ribbon.

To place all employees in an open Agent monitor in Make Busy

1) Right-click the monitor and click **Monitor control > Set Employee Make Busy >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Make Busy >** reason code from the **Monitor Control** tab in the Contact Center Client ribbon.
2) Click **Yes**.

Removing employees from Make Busy - Contact Center Client

Removing employees from Make Busy removes both employees and all of their agents from Make Busy.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To remove an employee in an open Employee monitor from Make Busy

- Right-click the cell of an employee whose agents are in Make Busy and click **Employee control > Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Employee Control** tab in the Contact Center Client ribbon.

To remove all employees in an open Employee monitor from Make Busy

1) Right-click the cell of an employee who is in Make Busy and click **Monitor control > Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Monitor Control** tab in the Contact Center Client ribbon.
2) Click **Yes**.

To remove an employee in an open Agent monitor from Make Busy

- Right-click the cell of an agent in Make Busy and click **Agent control > Remove Make Busy**. Alternatively, select the agent cell in an open monitor and click **Remove Make Busy** from the **Agent Control** tab in the Contact Center Client ribbon.

To remove all employees in an open Agent Monitor from Make Busy

1) Right-click the cell of an employee and click **Monitor control > Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the Monitor Control tab in the Contact Center Client ribbon.
2) Click **Yes**.

Placing employees in Do Not Disturb - Contact Center Client

NOTE:

- If an agent on an ACD calls puts themselves into MKB or DND, Work Timer events are not received for that call.
- Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing employees into Do Not Disturb places employees and all of their agents into Do Not Disturb.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To place an employee in an open Employee monitor in Do Not Disturb

- Right-click the cell of an employee and click **Employee Control > Set Do Not Disturb >** reason code. Alternatively, select the employee cell in an open monitor and click **Set Employee Do Not Disturb >** reason code.

To place all employees in an open Employee Monitor in Do Not Disturb

1) Right-click the monitor and click **Monitor control > Set Do Not Disturb >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.
2) Click **Yes**.

To place an employee in an open Agent monitor in Do Not Disturb

- Right-click the cell of an agent who is logged on and click **Agent control > Set Employee Do Not Disturb >** reason code. Alternatively, select the agent cell in an open monitor and click **Set Do Not Disturb >** reason code from the Agent Control tab in the Contact Center Client ribbon.

To place all employees in an open Agent monitor in Do Not Disturb

1) Right-click the monitor and click **Monitor control > Set Do Not Disturb >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Do Not Disturb** from the Monitor Control tab in the Contact Center Client ribbon.
2) Click **Yes**.

Removing employees from Do Not Disturb - Contact Center Client

Removing employees from Do Not Disturb removes employees and all of their agents from Do Not Disturb.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To remove an employee in an open Employee monitor from Do Not Disturb

- Right-click the cell of an employee who is in Do Not Disturb and click **Employee control > Remove Do Not Disturb**. Alternatively, select the employee cell in and click **Remove Do Not Disturb** from the **Employee Control** tab in the Contact Center Client ribbon.

To remove all of a monitor's employees in an open Employee monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control > Remove Do Not Disturb**. Alternatively, select an empty cell in an open monitor and click **Remove Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

To remove an employee in an open Agent monitor from Do Not Disturb

- Right-click the cell of an agent who is in Do Not Disturb and click **Agent control > Remove Do Not Disturb**. Alternatively, select the agent cell in an open monitor and click **Remove Do Not Disturb** from the **Agent Control** tab in the Contact Center Client ribbon.

To remove all of a monitor's employees in an open Agent monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control > Remove Do Not Disturb**. Alternatively, select an empty cell in an open monitor and click **Remove Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

Canceling Work Timer for employees - Contact Center Client

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

In an Employee monitor or Agent monitor, you can cancel Work Timer for one or more employees. The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To cancel Work Timer in an open Employee monitor

- Right-click the cell of an employee who is in Work Timer and click **Employee control > Cancel Work Timer**. Alternatively, select the employee cell in an open monitor and click **Cancel Work Timer** in the appropriate media section of the **Employee Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for all employees in an open Employee monitor

- Right-click the monitor and click **Monitor control > Cancel Work Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Work Timer** in the media type's section of the **Monitor Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for an employee in an open Agent monitor

- Right-click the cell of an agent who is in Work Timer and click **Agent control > Cancel Work Timer**. Alternatively, select the agent cell in an open monitor and click **Cancel Work Timer** from the **Agent Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for all employees in an open Agent monitor

- Right-click the monitor and click **Monitor control > Cancel Work Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Work Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

Canceling the Reseize Timer for external hot desk agents

If an external hot desk user is unavailable and the ACD path attempts to deliver a call to them the ACD routing system will initiate the Reseize Timer, preventing further ACD call delivery attempts until the timer expires or is canceled by the agent or supervisor. Value settings for reseize timers are a minimum of four seconds, a default of 180 seconds, and a maximum of 60 minutes. These values are configured on the ACD routing system. When an agent is in the Reseize Timer state, the applicable real-time monitors in Contact Center Client display the Make Busy icon as well as text denoting the agent's current state as 'Reseize Timer'.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To cancel Reseize Timer for an employee's voice agent in an open Employee monitor

- Right-click the cell of an employee who is in Reseize Timer and click **Employee control > Cancel Reseize Timer**. Alternatively, select the employee cell in an open monitor and click **Cancel Reseize Timer** in the appropriate media section of the **Employee Control** tab in the Contact Center Client ribbon.

To cancel Reseize Timer for all employee voice agents in a monitor in an open Employee monitor

- Right-click the monitor and click **Monitor control > Cancel Reseize Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Reseize Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

To cancel Reseize Timer for an employee's voice agent in an open Agent monitor

- Right-click an agent who is in Reseize Timer and click **Agent control > Cancel Reseize Timer**. Alternatively, select the agent cell in an open monitor and click **Cancel Reseize Timer** in the appropriate media section of the **Agent Control** tab in the Contact Center Client ribbon.

To cancel all of the voice agents on a monitor in the Reseize Timer state in an open Agent monitor

- Right-click the monitor and click **Monitor control > Cancel Reseize Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Reseize Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

Accessing historical real-time information with Contact Center Client

Using Auditor you can view historical, multimedia real-time events, at your own pace. Auditor makes it easy for you to analyze when and why past service problems occurred. By understanding the series of events you can prevent such issues from recurring.

For example, you notice that on July 15 you have 12 interactions abandon between 10:00 AM and 10:15 AM. You can review the interactions and the agents' actions on that date for that time period with Auditor. Did all of the interactions arrive at the same time? Did all of the agents go on break at the same time? If all of the interactions arrived at once, you need to schedule more people. If all of the agents went on break at the same time, you need to adjust their break schedule.

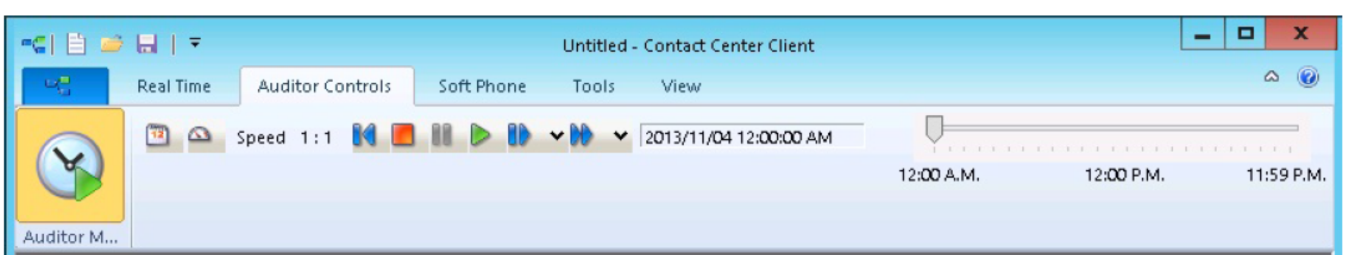
Using Auditor you can also track when employees log on and log off the system. It is easy to determine if any of the employees consistently start late or finish early.

With Auditor, you can use existing profiles, including alarm thresholds, when viewing past days run in real time.

Your access to Auditor is determined by administrator-set security roles.

The first toolbar consists of real-time monitors that provide information on agent availability, queue statistics, and graphic displays on queues. (See the following figure.)

Figure 59: Auditor toolbar



Auditor icons

Using Auditor's second toolbar you select the date of the historical real-time events that you want to view and the speed at which to play the events. The icons are described in the following table.

Table 27: Auditor Icons (Sheet 1 of 2)

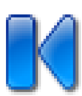
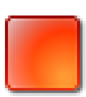
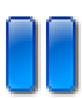
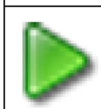
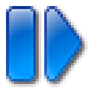
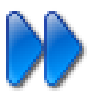
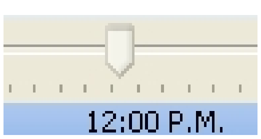
Icon	Term	Meaning
	Calendar	You can select the date of the historical real-time events that you want to view by clicking the calendar.
	Speed of audit	The Speed of audit is expressed as a ratio of real-time to play speed. You can select the speed from a list of ratios that opens when you click the clock: 1:1, 1:2, 1:5, 1:10, 1:30, 1:60, and 1:120. If you select the ratio1:1, it will take you one second to view one second of the past day. If you select 1:60, it will take you one second to view one minute of the past day.
	Rewind	If you click Rewind when the play is stopped, you jump back to the beginning of the day.
	Stop	You can stop the real-time historical events from playing, and jump back to the beginning of the day, by clicking Stop.
	Pause	You can pause the real-time historical events by clicking Pause.
	Play	You can play the real-time historical events by clicking Play.

Table 27: Auditor Icons (Continued) (Sheet 2 of 2)

Icon	Term	Meaning
	Step forward	You can select the increment (in seconds) you will advance from a list that opens when you click the down arrow to the right of Step forward: 1 sec, 2 sec, 5 sec, 10 sec, 15 sec, 30 sec, and 45 sec. If you select 30 seconds, then when the play is stopped, you can step forward in 30 second increments each time you click Step forward. When you reach the end of data for that day, you will automatically jump to the end of the day.
	Jump forward	You can select the increment (in minutes) you will advance from a list that opens when you click the down arrow to the right of Jump forward: 1 min, 2 min, 5 min, 10 min, 15 min, 30 min, and 60 min. If you select 10 minutes, then when the play is stopped, you can jump forward in 10 minute increments each time you click Jump forward. When you reach the end of data for that day, you will automatically jump to the end of the day.
	Slider	As you view the events of the day, the slider indicates the time at which the events occurred. The length of the slider represents the length of the day for which you are viewing historical real-time events.

Viewing historical real-time events

You start Contact Center Client to gain access to Auditor functionality. For more information on Contact Center Client real-time monitoring, see "Contact Center Client" chapter of the *MiContact Center Business User Guide*.

To view historical real-time events, you must

1) Start Contact Center Client.
2) Open the grids in which you want to view historical events.

   NOTE: When viewing a Queue or Queue Group monitor, emails in queue that arrived from a previous day in the auditing period will not show up in the monitor statistics until an action is taken on them during the auditing period.
3) Start Auditor.

Starting and using Auditor

You start Contact Center Client to gain access to Auditor functionality.

To view historical real-time events, you must

1) Start Contact Center Client.
2) Open the grids in which you want to view historical events.

   NOTE: When viewing a Queue or Queue Group monitor, emails in queue that arrived from a previous day in the auditing period will not show up in the monitor statistics until an action is taken on them during the auditing period.
3) Start Auditor.

NOTE: If you are using the Contact Center Client marquee, Contact Center PhoneSet Manager, Contact Center Softphone, or Interactive Visual Queue applications (which function in real time only), open Auditor in another instance of Contact Center Client.

To start and use Auditor

1) In the Contact Center Client ribbon, click **Auditor Controls**.
2) Click **Auditor Mode** in the toolbar ribbon.

   The Auditor toolbar displays.
3) Click the calendar icon and select a date.

   The date displays on the left of the slider.
4) Click the speed icon and select the speed of the audit.

   The speed of the audit, expressed as a ratio of real time to play speed, displays on the right of the speed icon.
5) Move the slider to select the time of day at which you want to start monitoring.
6) Click the play button to play the real-time events of the selected date.

   The historical real-time events play at the speed you selected.

Accessing real-time information with Contact Center Client

You use Contact Center Client to access real-time contact center agent, queue, and interaction information.

The following section describes typical supervisor usage of the monitors available in Contact Center Client. For more detailed information regarding Contact Center Client, see *"Real-time Monitors"*.

Starting Contact Center Client

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

You use Contact Center Client to access real-time monitors and functionality. Supervisors can view real-time voice, email, chat, SMS, and open media statistics. After starting Contact Center Client, supervisors can choose to minimize it to either the system tray or the taskbar.

To start Contact Center Client

1) Open **Contact Center Client**.
2) If prompted, type your **Username** and **Password** and verify the **Enterprise Server** IP address.
3) If you use Secure Socket Layer, select **SSL**.
4) Optionally, select **Remember my credentials**.
5) Click **Login**.

Hiding monitor control

Interactive Contact Center enables you to manage the presence of all devices in a monitor using Monitor Device Control. If you do not want to use monitor control, you can hide this option so it is not accessible.

To hide the Monitor control option

1) In **Contact Center Client**, click the **Contact Center Client button > Options**.
2) Under **Device control**, clear the **Display monitor device control option** check box.
3) Click **OK**.

Employee and Agent state indicators

The following icons display in agent or employee monitors and indicate the current agent/employee state and media type with which they are engaged. You can choose to display the icons as shown in the following tables or select the Classic view (Contact Center Client tab > Options > Real-time icons).

NOTE: If Contact Center Client becomes disconnected from the server, upon re-connection agent states will be automatically synchronized with the server.

The following table displays Employee state icons and their meanings.

The following table displays Agent state icons and their meanings.

Table 28: Employee states (Sheet 1 of 2)

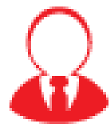
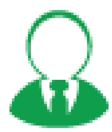
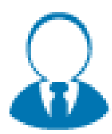
Term	Icon	Meaning
Ringing		An ACD interaction ringing on the employee, waiting to be handled
ACD		An employee handling an ACD interaction
ACD Hold		An employee who has placed an ACD interaction on hold
Idle		An employee logged on and waiting to receive an interaction
Non ACD		An employee involved in an incoming Non ACD interaction or employee-originated voice interaction
Non ACD Hold		An employee who has placed a Non ACD voice interaction on hold
Outbound		An employee on an outgoing voice interaction
Outbound Hold		An employee who has placed an outgoing voice interaction on hold
Do Not Disturb		An employee who has activated Do Not Disturb and is not available to receive any ACD or Non ACD interactions

Table 28: Employee states (Continued) (Sheet 2 of 2)

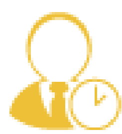
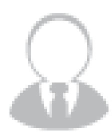
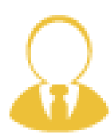
Term	Icon	Meaning
Make Busy		An employee who is not available to receive ACD interactions but can receive transferred interactions and voice interactions dialed directly to the employee This icon also displays when an employee's external hot desk agent is in the Reseize Timer state
System Make Busy		An employee that the system has put into a state where they cannot receive ACD contacts. For example, if an employee is offered a communication and does not answer, they will be put into System Make Busy for a predetermined length of time.
Work Timer		An employee who is completing post-contact work, such as paperwork, and is unavailable to receive interactions of that media type
Logged Off		An employee not currently logged in to any queue
Logged In Not Present		An employee logged in but not present in any of their agent groups, and employees not present in a media type across all groups
Unavailable		An employee who has not generated any activity since Mi Contact Center Business was started

Table 29: Agent states (Sheet 1 of 3)

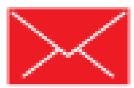
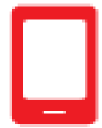
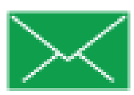
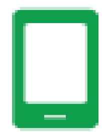
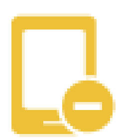
Term	Voice	Email	Chat	SMS	Meaning
Ringing					An ACD interaction ringing on an agent, waiting to be handled
ACD					An agent handling an ACD interaction
ACD Hold					An agent who has placed an ACD interaction on hold
Idle					An agent logged on and waiting to receive an interaction
Non ACD		-	-	-	An agent involved in an incoming Non ACD interaction or agent-originated voice interaction
Non ACD Hold		-	-	-	An agent who has placed a Non ACD voice interaction on hold
Outbound		-	-	-	An agent on an outgoing voice interaction
Outbound Hold		-	-	-	An agent who has placed an outgoing voice interaction on hold
Do Not Disturb					An agent who has activated Do Not Disturb and is not available to receive any ACD or Non ACD interactions

Table 29: Agent states (Continued) (Sheet 2 of 3)

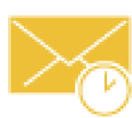
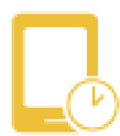
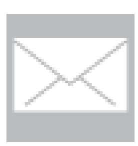
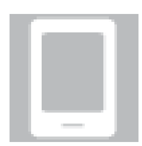
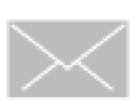
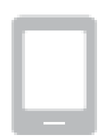
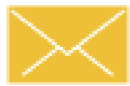
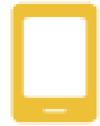
Term	Voice	Email	Chat	SMS	Meaning
Make Busy					An agent who is not available to receive ACD interactions but can receive transferred interactions and voice interactions dialed directly to the agent This icon also displays when an external hot desk agent is in the Reseize Timer state
System Make Busy					If an agent is a multimedia agent and is logged on to two or more media servers simultaneously, the system sends the agent only one incoming communication at a time. For example, when the agent answers a voice interaction, the system places the agent ID(s) for the other media server types in System Make Busy
Work Timer					An agent who is completing post-contact work, such as paperwork, and is unavailable to receive interactions of that media type
Unknown					An agent who has not generated any activity since Mi Contact Center Business was started
Logged Off					An agent not currently logged in to any queue

Table 29: Agent states (Continued) (Sheet 3 of 3)

Term	Voice	Email	Chat	SMS	Meaning
Logged In Not Present					An agent logged in but not present to any of their agent groups, and agents not present to a media type across all groups

Overriding states in real-time monitors

An overriding state is a state that ‘trumps’ another state as the state that appears in an Agent or Employee monitor. The states by order of priority are:

- Ringing
- ACD
- ACD Hold
- Non ACD
- Non ACD Hold
- Outbound
- Outbound Hold
- Work Timer
- Do Not Disturb
- Make Busy
- System Idle
- Idle

Monitoring agents and queues

The real-time monitors in Contact Center Client are automatically updated to reflect current contact center activity and device and device group configuration changes. Supervisors can use the following monitors to access up-to-the-minute statistics and information to assist in identifying performance issues and dealing with such situations immediately as they arise.

You can customize the card design to display information in the monitors to suit your work environment. For more information on customizing Contact Center Client monitors, see *"Customizing the information displayed on position and time monitors"*.

Contact Center Client real-time monitors and charts are briefly described in the following section. If you require a more detailed description of the monitors and charts available with Contact Center Client, see *"Real-time Monitors"*.

Workload and monitors

Employee Workload can affect the value displaying in real-time monitors for ACD, Ringing, Hold, and Work Timer if employees are handling multiple interactions that are in the same state. If an employee is handling multiple interactions at the same time in the same state, the Agent or Employee monitor will display the time of the oldest interaction. When the oldest interaction changes its state, the time will change to the time of the next oldest interaction.

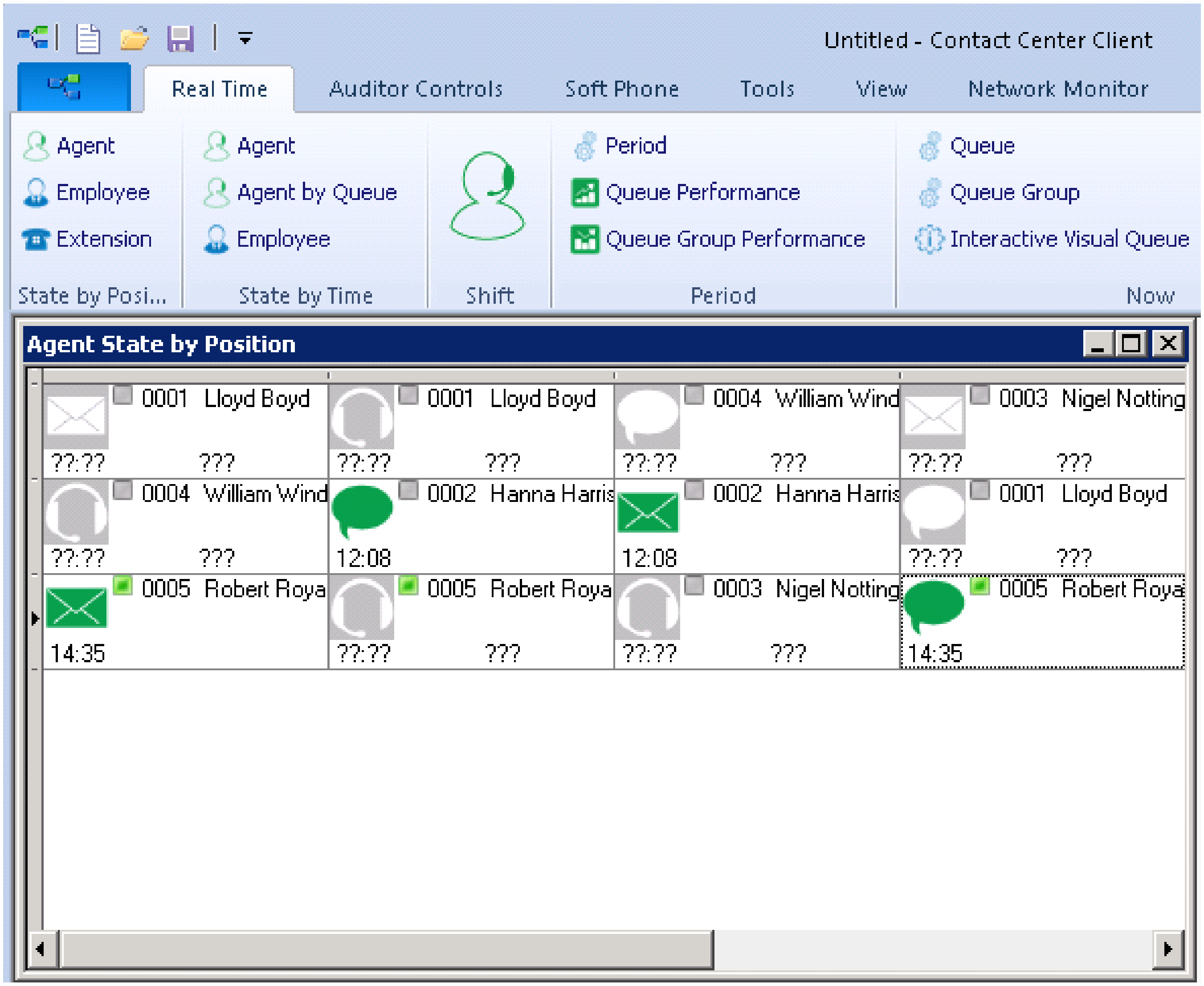
For example, if an email agent in ACD was handling two emails, one at 5:30 and the other at 1:30, the displayed ACD time would be 5:30. If the employee finished handling the oldest email, the time would change to 1:30.

For more information on Workload, see *"Configuring Workload"*.

Agent or Employee State by Position monitor

The Agent and Employee State by Position monitors provide real-time information in cells that you can arrange to mirror your floor plan, enabling you to view employees by their physical position in your contact center. (See the following figures.)

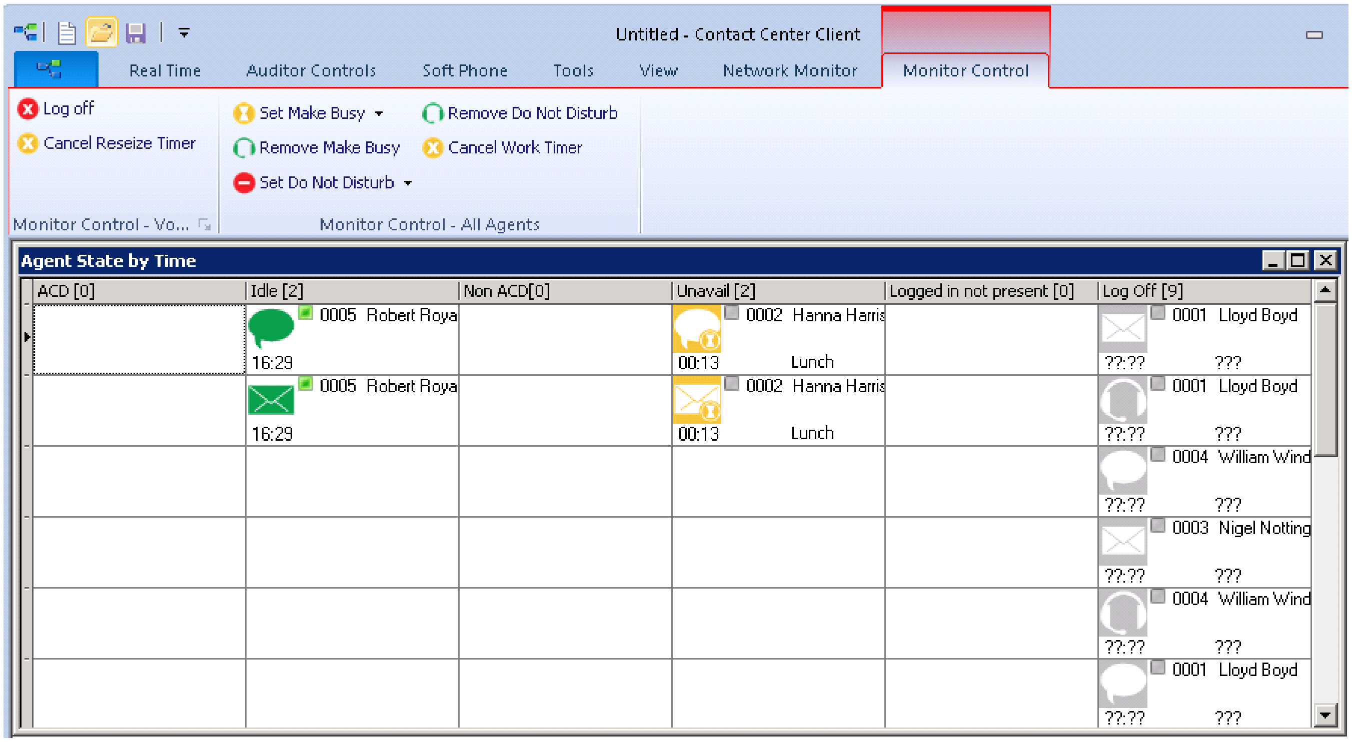
Figure 60: Agent or Employee State by Position monitor



Agent or Employee State by Time monitor

The Agent or Employee State by Time monitors provide real-time agent information under ACD, Idle, Non ACD, Unavailable, and Logged Off column headings. The difference between this monitor and the State by Position monitor is that the Agent or Employee State by Time monitors list agents in order of the time spent in the applicable state. You can specify which columns of agent statistics display and in what order they display. For example, you can sort logged off agents by designating the longest logged off agent to display first in the list. (See the following figure.)

Figure 61: Agent or Employee State by Time monitor



The following table lists the Agent or Employee State by Time column headings and their associated agent states.

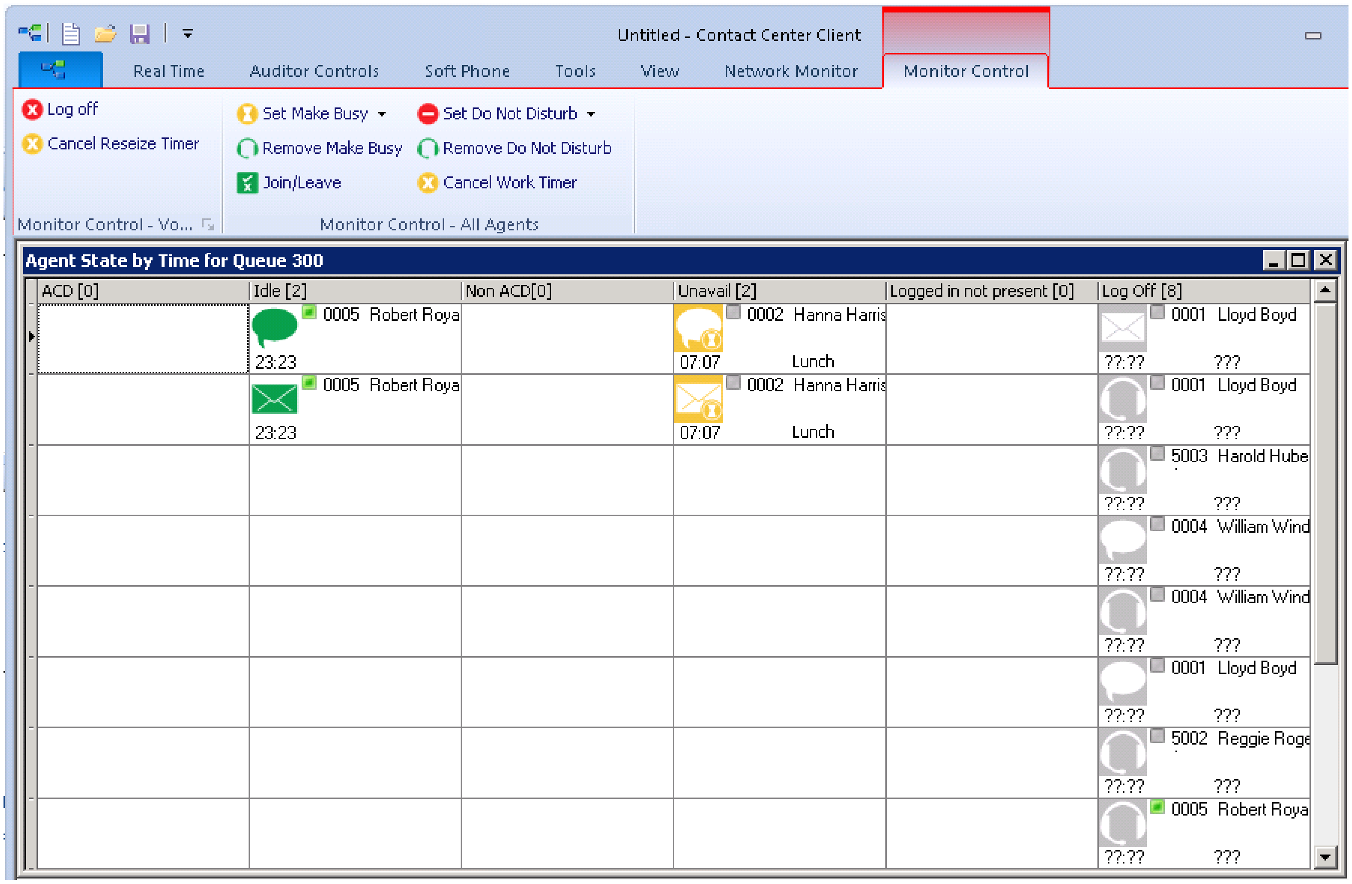
Table 30: Agent State by Time and Employee State by Time column headings

Category	Associated agent states
ACD	includes agents in ACD and agents in ACD Hold
Idle	includes agents in the Idle state
Non ACD	includes agents in Non ACD, in Non ACD Hold, Outbound agents, and Outbound Hold agents
Unavailable	includes agents in Do Not Disturb, Make Busy, Work Timer, Reseize Timer, and Unknown
Logged in not present	includes agents logged in but not present to any of their agent groups, and agents not present to a media type across all groups
Log Off	includes agents in the Logged Off and Offline (Ignite, WEB) states

Agent State by Time for Queue monitor

The Agent State by Time for Queue monitor is designed specifically for contact centers who use Agent Group Presence functionality. This monitor is accessed from the Time menu in Contact Center Client and displays all agents configured in a specific queue and agents who are on ACD interactions, Idle, on Non ACD voice interactions, unavailable, logged onto the system but not present in the queue being monitored, and logged off. Virtual queue groups are shown under the Virtual queue groups section of this monitor and are marked in the title as (virtual).(See the following figure.)

Figure 62: Agent State by Time for Queue monitor



The following table lists the Agent State by Time for Queue column headings and their associated agent states.

Table 31: Agent State by Time for Queue column headings (Sheet 1 of 2)

Category	Associated agent states
ACD	includes agents in ACD and agents in ACD Hold
Idle	includes agents in the Idle state
Non ACD	includes agents in Non ACD, in Non ACD Hold, Outbound agents, and Outbound Hold agents
Unavailable	includes agents in Do Not Disturb, Make Busy, Work Timer, and Reseize Timer

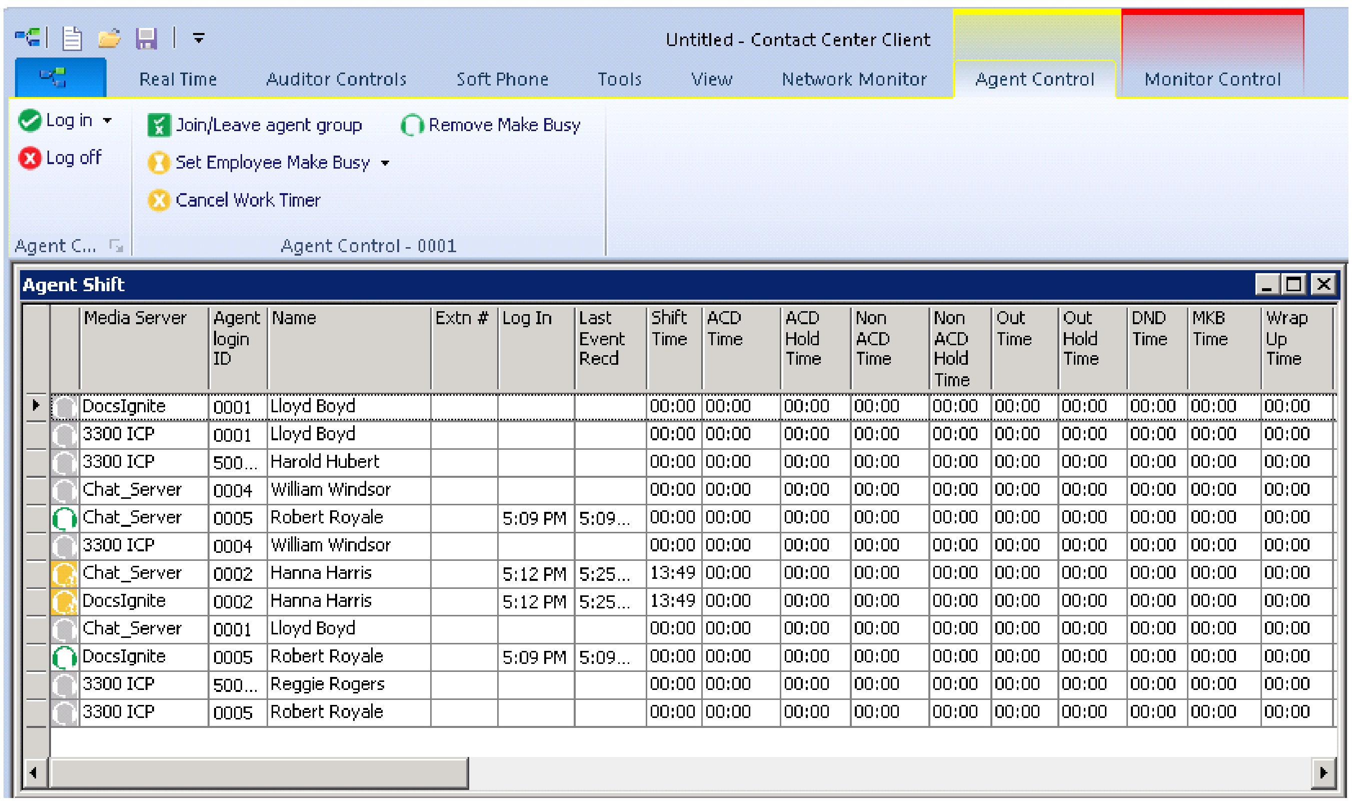
Table 31: Agent State by Time for Queue column headings (Continued) (Sheet 2 of 2)

Category	Associated agent states
Logged in not present	includes agents logged in but not present to any of their agent groups, and agents not present to a media type across all groups
Log Off	includes agents in the Logged Off, Unknown, and Offline (Ignite, WEB) states

Agent Shift monitor

The Agent Shift monitor provides running daily totals of statistics for individual agents. You can specify which columns of statistics display and the order in which they display. (See the following figure.)

Figure 63: Agent Shift monitor



The following table lists the Agent Shift column headings and their definitions.

Table 32: Agent Shift column headings (Sheet 1 of 4)

Term	Abbreviated Name	Meaning
Agent State		The agent's media type and current state

Table 32: Agent Shift column headings (Continued) (Sheet 2 of 4)

Term	Abbreviated Name	Meaning
Media Server	Media Server	The media server to which the agent is associated
Agent Shift Name	Name	The name of the agent being monitored
Agent login ID	Agent login ID	The login ID of the agent being monitored
Extension Number	Extn #	The extension where the agent logged in (voice only)
Logged On	Log In	The most recent time the agent logged in
Last Event Received	Last Event Recd	The most recent time an agent event occurred
Shift Time	Shift Time	The total elapsed time logged for the agent, calculated based on the difference between log in and last event received
ACD Time	ACD Time	The duration of ACD interactions handled, from agent pickup to completion (not including hold time)
ACD Hold Time	ACD Hold Time	The duration of time ACD interactions spent on hold
Non ACD Time	Non ACD Time	The duration of Non ACD interactions handled, from agent pickup to completion (not including hold time) (voice only)
Non ACD Hold Time	Non ACD Hold Time	The duration of time Non ACD interactions spent on hold (voice only)
Outbound Time	Out Time	The duration of time agents spent handling outbound calls (voice only)
Outbound Hold Time	Out Hold Time	The duration of time outbound calls spent on hold, for agents (voice only)

Table 32: Agent Shift column headings (Continued) (Sheet 3 of 4)

Term	Abbreviated Name	Meaning
Do Not Disturb Time	DND Time	The duration of time the agent entered the Do Not Disturb State
Make Busy Time	MKB Time	The number of times the agent entered the Make Busy state
Wrap Up Time	Wrap Up Time	The duration of time where Wrap Up Time was the overriding state for the agent. Wrap up time does not include any time spent making or taking interactions during the wrap up timer.
Do Not Disturb Count	DND Cnt	The number of times the agent entered the Do Not Disturb state
Make Busy Count	MKB Cnt	The number of times the agent entered the Make Busy state
ACD Count	ACD Cnt	The number of ACD interactions handled by the agent
Short ACD Count	Shrt ACD Cnt	The number of ACD interactions handled by the agent where the handle time was less than the Short Handle parameter
Non ACD Count	Non ACD Cnt	The number of Non ACD interactions handled by the agent (voice only)
Hold ACD Count	Hold ACD Cnt	The number of times ACD interactions were placed on hold
Non ACD Hold Count	Non ACD Hold Cnt	The number of times Non ACD interactions were placed on hold (voice only)
Outbound Count	Out Cnt	The number of outbound calls made by the agent (voice only)

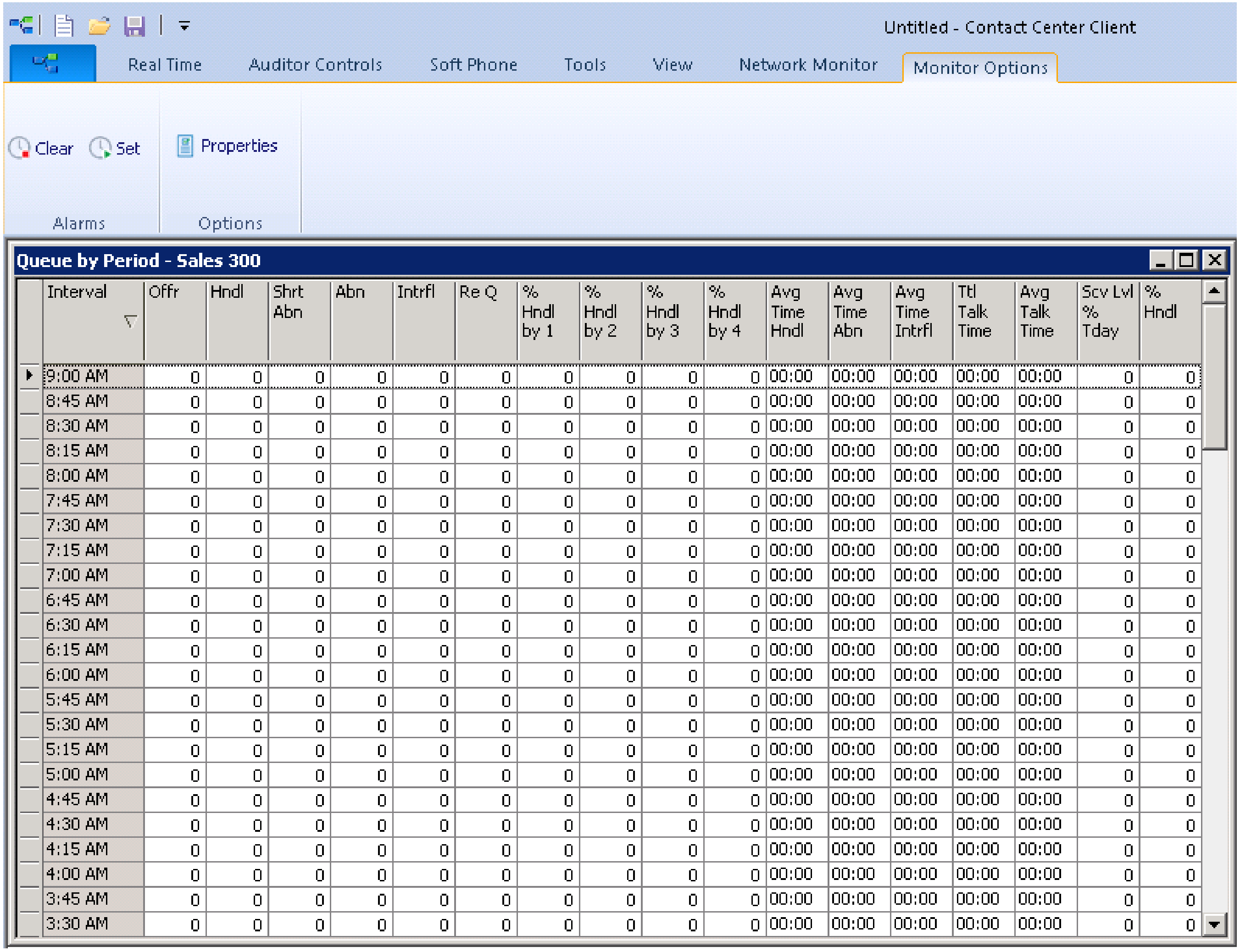
Table 32: Agent Shift column headings (Continued) (Sheet 4 of 4)

Term	Abbreviated Name	Meaning
Outbound Hold Count	Out Hold Cnt	The number of times outbound calls were placed on hold (voice only)
Contacts Per Hour	Contacts Per Hour	The total ACD interaction count minus the ACD short handle count, divided by the shift time for the agent
On Failover	On failover	Indicates whether the primary media server is offline and has failed over to the secondary media server (voice only)
Agent Unavailable Percent	Agt Unavail %	The percentage of shift time for which the agent was unavailable to receive interactions
Logged In Not Present Time	Logged In Not Present Time	The duration of time the agent was logged into but not present to any of their agent groups, and the duration of time the agent was not present in a media type across all groups
Average Handle	Avg Hndl	The average amount of time the agent spent handling ACD interactions (ACD Time divided by ACD Count, excluding ACD Hold Time).
Occupancy	Occp	The duration of time the agent spent processing interactions, including ringing time

Queue by Period monitor

The Queue by Period monitor collates queue statistics by 15-minute intervals over a 24-hour period. The monitor refreshes each time there is a change in a statistic and at 15-minute intervals. The current 15-minute interval always displays at the top of the monitor. (See the following figure.)

Figure 64: Queue by Period monitor



The following table lists the Queue by Period column headings and their definitions.

Table 33: Queue by Period column headings (Sheet 1 of 4)

Term	Abbreviated Name	Meaning
Interval time	Interval	The 15 minute interval of time
Offered	Offr	The total number of interactions offered to the queue during the 15-minute interval
Handled	Hndl	The total number of interactions answered by agents during the 15-minute interval

Table 33: Queue by Period column headings (Continued) (Sheet 2 of 4)

Term	Abbreviated Name	Meaning
Short Abandoned	Shrt Abn	During the 15-minute interval, the total number of interactions abandoned before the short abandon time configured in YourSite
Abandoned	Abn	The total number of interactions abandoned during the 15-minute interval before being answered by members
Interflowed	Intrfl	The total number of interactions interflowed during the 15-minute interval
Requeued	Re Q	The total number of interactions re-queued during the 15-minute interval **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
% Handled by 1-4	% Hndl by 1-4	A count of all of the interactions answered by the first, second, third, and fourth agent groups during the 15-minute interval **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Average Time to Handle	Avg Time Hndl	The average number of minutes interactions waited to be taken out of queue (answered or picked) by an members during the 15-minute interval
Average Time to Abandon	Avg Time Abn	The average number of minutes interactions waited during the 15-minute interval before they abandoned their interactions

Table 33: Queue by Period column headings (Continued) (Sheet 3 of 4)

Term	Abbreviated Name	Meaning
Average Time to Interflow	Avg Time Intrfl	The average number of minutes interactions waited during the 15-minute interval before being interflowed
Total Conversation Time	Ttl Conv Time	The total time members spent communicating (talking, chatting, or replying) with interactions during the 15-minute interval
Average Conversation Time	Avg Conv time	The average time members spent communicating with interactions during the 15-minute interval
Service Level % Level	Scv Lvl % Tday	During the 15-minute interval, the percentage of interactions answered within the Service Level Time specified for the queue
% Handled	% Hndl	During the 15-minute interval, the percentage of interactions answered compared to the total number of interactions offered to the ACD queue for the day **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Wrap Up	Wrap Up	The total time the agent spent in the Work Timer state during the 15-minute interval **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.

Table 33: Queue by Period column headings (Continued) (Sheet 4 of 4)

Term	Abbreviated Name	Meaning
Make Busy	Make Busy	The total time the agent spend in the Make Busy state during the 15-minute interval **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Occupancy	Occp	The total time the agent spent in an occupied state during the 15-minute interval (occupied state excludes idle time)
# Handled by 1-4	# Hndl by 1-4	The number of interactions answered by the first, second, third, and fourth agent groups during the 15-minute interval **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.

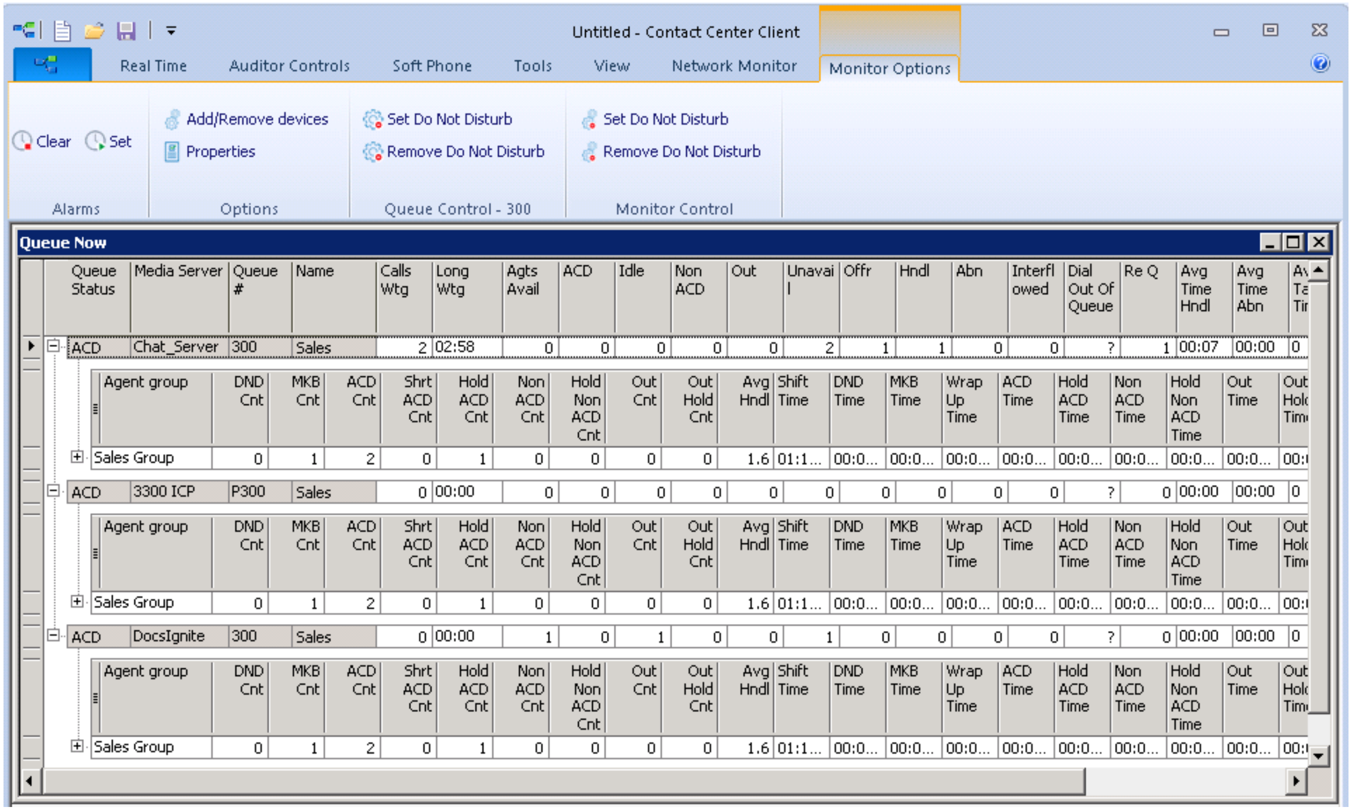
Queue Now and Queue Group Now monitors

The Queue Now monitor enables supervisors to view queue statistics in real-time, as well as expand individual queues in the monitor to view statistics on each queue's associated member agents or extensions. When you expand the Queue Now monitor to display the Name column, the monitor also displays member presence in the queue. Presence is indicated by a colored star in the Present column. A green star indicates the member is present in the queue. A gray star and gray row indicate the agent is not present in the queue. (See the following figure.)

NOTE:

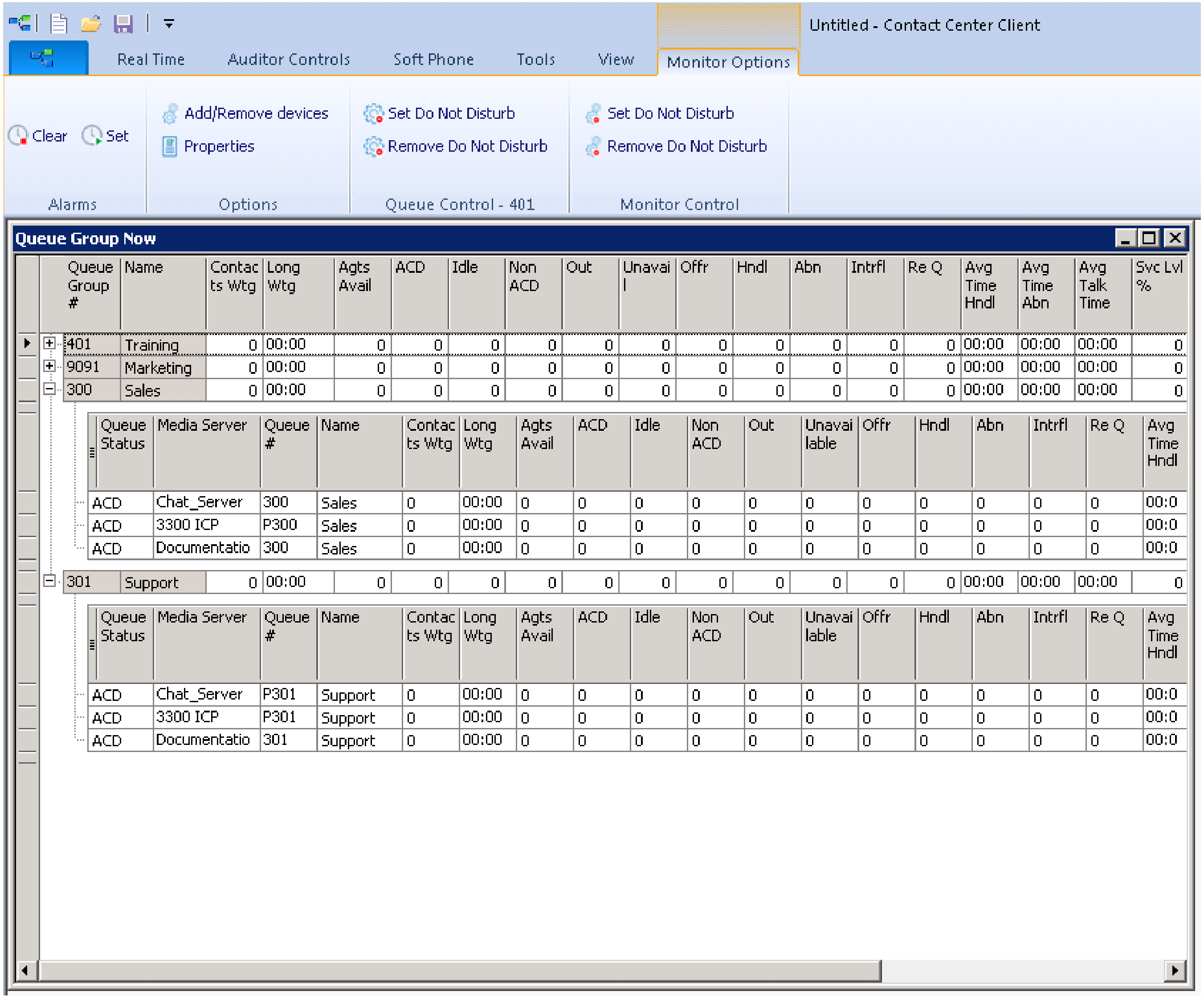
- Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- Prior to version 7.1, Queue Now monitors displayed queue's member agent groups with agent group statistics. As of version 7.1, this functionality has been removed. Instead, queue members are grouped by agent group.

Figure 65: Queue Now monitor



The Queue Group Now monitor enables supervisors to view aggregated statistics for Reporting, Virtual, and Unified queue groups in real-time, as well as expand individual queue groups in the monitor to view statistics for the queue group's associated queues. (See the following figure.)

Figure 66: Queue Group Now monitor



The following table lists the real-time and over-the-business-day Queue Now and Queue Group Now queue and queue group statistics and their definitions.

NOTE: Some statistics in the Queue Now monitor display in the Queue Group Now monitor as member statistics.

Table 34: Queue Now and Queue Group Now queue statistic column headings (Sheet 1 of 10)

Term	Abbreviated Name	Meaning
Queue Status	Queue Status	The current status of the queue—either Open, Closed, or Do Not Disturb (voice only)

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 2 of 10)

Term	Abbreviated Name	Meaning
Queue Group Number	Queue Group #	The queue group reporting number (Queue Group Now only)
Media Server	Media Server	The queue’s media server
Queue Number	Queue #	The queue's reporting number
Queue Name	Name	The queue or queue group name
Contacts Waiting	Contacts Wtg	The current number of contacts in queue waiting for an member to become available, including those listening to silence, music, or recorded announcements
Longest Waiting	Long Wtg	The current duration, in minutes and seconds, of the contact waiting the longest in queue or queue group
Available (Queue Now) Agents Available (Queue Group Now)	Avail (Queue Now) Agts Avail (Queue Group Now)	The total number of members logged in and not in Do Not Disturb, Make Busy, Work Timer, Ringing, Reseize Timer, Unknown, and Offline (Ignite, WEB)
ACD	ACD	The current number of members handling ACD interactions
Idle	Idle	The current number of members logged on and ready to receive interactions
Non ACD	Non ACD	The current number of members handling Non ACD calls (voice only)
Outbound	Out	The current number of members on outgoing calls (voice only)

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 3 of 10)

Term	Abbreviated Name	Meaning
Unavailable	Unavail	The current number of agents in Do Not Disturb, Make Busy, Work Timer, or Unknown
Offered	Offr	The total number of interactions offered to the queue / queue group
Handled	Hndl	The total number of ACD interactions handled by members
Abandoned	Abn	The total number of interactions abandoned before being answered by members **NOTE:** Abandoned does not peg short abandons as abandoned interactions while the Abandoned column in the Interactive Visual Queue monitor displays all abandoned interactions. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors.
Interflowed	Intrfl	The total number of ACD interactions interflowed. Interflow is a mechanism that directs an interaction waiting in queue to another answer point.
Requeued	Re Q	The total number of ACD interactions requeued **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 4 of 10)

Term	Abbreviated Name	Meaning
Average Time to Handle	Avg Time Hndl	The average time it takes for the interaction to be taken out of queue (answered or picked) by a member
Average Time to Abandon	Avg Time Abn	The current average amount of time customers wait in queue before abandoning interactions
Average ConversationTime	Avg Conv Time	The current average time members spent communicating (talking, chatting, or replying) with contacts
Service Level %	Svc Lvl %	For a queue, this is the percentage of interactions handled within the queue's Service Level Time value over the day. For a queue group, this is the lowest percentage of interactions handled within the queue's Service Level Time value over the day across all queues.
Handled %	% Hndl	For a queue, this is the percentage of interactions handled compared to the total number of interactions offered to the queue for the day. For a queue group, this is the lowest percentage of interactions handled compared to the total number of interactions offered to the queue for the day across all queues.

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 5 of 10)

Term	Abbreviated Name	Meaning
% Handled by 1-4	% Hndl by 1-4	For a queue, this is the percentage of all of the interactions answered by the first, second, third, and fourth agent groups. For a queue group, this is the highest percentage of all of the interactions answered by the first, second, third, and fourth agent groups. **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Total Conversation Time	Ttl Conv Time	The current total time members spent communicating (talking, chatting, or replying) with contacts
Total Queue Unavailable	Ttl Q Unavail	The total number of times during the day that interactions are rerouted because the queue is in Do Not Disturb or has no members logged in
Current Queue Unavailable	Curr Q Unavail	The current number of interactions are rerouted because no members are logged in or the queue is in Do Not Disturb. Once the queue becomes available, this value resets to 0.
Offered Last Hour	Offr Last Hour	The total number of interactions offered to the queue during the last hour of business
Time to Handle Last Hour	Time Hndl Last Hour	The time interactions waited in queue during the last hour of business before being handled by an agent

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 6 of 10)

Term	Abbreviated Name	Meaning
% Handled Last Hour	% Hndl Last Hour	For a queue, this is the percentage of interactions handled in the last hour of business, compared to the total number of interactions offered to the ACD queue for the day. For a queue group, this is the lowest percentage of interactions handled in the last hour of business, compared to the total number of interactions offered to the ACD queue for the day.
Service Level % Last Hour	Svc Lvl % Last Hour	For a queue, this is the percentage of interactions answered or picked within your Service Level Time value in the last hour. For a queue group, this is the lowest percentage of interactions answered or picked within your Service Level Time value in the last hour.
Handled Last Hour	Hndl Last Hour	The total number of interactions handled by members during the last hour of business
Abandoned Last Hour	Abn Last Hour	The total number of interactions abandoned during the last hour of business
Interflowed Last Hour	Intrfl Last Hour	The total number of interactions interflowed during the last hour of business. Interflow is a mechanism that directs an contacts waiting in queue to another answer point.

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 7 of 10)

Term	Abbreviated Name	Meaning
Unavailable Last Hour	Unavail Last Hour	The total number of times, in the last hour of business, interactions were rerouted because the queue they tried to access was in Do Not Disturb or had no members logged in See Current Queue Unavailable.
Average Handling Time Last Hour	Avg Hndl Last Hour	The average duration of interactions from agent pick up to client hang up (including hold time) during the last hour of business
Offered Last 15 Minutes	Offr Last 15 Min	The total number of interactions offered to the queue in the last 15 minutes of business
Time to Handle Last 15 Minutes	Time Hndl Last 15 Min	The time interactions waited in queue during the last 15 minutes of business before being handled by a member
% Handled Last 15 Minutes	% Hndl Last 15 Min	For a queue, the percentage of interactions answered in the last 15 minutes of business, compared to the total number of interactions offered to the ACD queue for the day For a queue group, the lowest percentage of interactions answered in the last 15 minutes of business, compared to the total number of interactions offered to the ACD queue for the day.

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 8 of 10)

Term	Abbreviated Name	Meaning
Service Level % Last 15 Minutes	Svc Lvl % Last 15 Min	For a queue, this is the percentage of interactions answered or picked within your Service Level Time value in the last 15 minutes of business. For a queue group, this is the lowest percentage of interactions answered or picked within your Service Level Time value in the last 15 minutes of business.
Handled Last 15 Minutes	Hndl Last 15 Min	The total number of interactions handled by members during the last 15 minutes of business
Abandoned Last 15 Minutes	Abn Last 15 Min	The total number of interactions abandoned during the last 15 minutes of business
Interflowed Last 15 Minutes	Intrfl Last 15 Min	The total number of interactions interflowed during the last 15 minutes of business. Interflow is a mechanism that directs an interaction waiting in queue to another answer point.
Unavailable Last 15 Minutes	Unavail Last 15 Min	The total number of times, in the last 15 minutes of business, contacts were rerouted because the queue they tried to access was in Do Not Disturb or had no members logged in See Current Queue Unavailable.
Average Handling Time Last 15 Minutes	Avg Hndl Last 15 Min	The average handling duration of interactions from interaction pickup to interaction completion, including hold time, during the last 15 minutes of business

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 9 of 10)

Term	Abbreviated Name	Meaning
% Abandoned	% Abn	For a queue, this is the percentage of interactions that were abandoned (% Abandoned = Interactions Abandoned ÷ Interaction Offered) For a queue group, this is the highest percentage of interactions that were abandoned (% Abandoned = Interactions Abandoned ÷ Interactions Offered)
% Abandoned Last Hour	% Abn Last Hour	For a queue, this is the percentage of interactions that were abandoned in the last hour of business For a queue group, this is the highest percentage of interactions that were abandoned in the last hour of business
% Abandoned Last 15 Minutes	% Abn Last 15 Min	For a queue, this is the percentage of interactions that were abandoned in the last 15 minutes of business For a queue group, this is the highest percentage of interactions that were abandoned in the last 15 minutes of business
Wrap Up	Wrap Up	The total time that agents spent in the Work Timer state **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.

Table 34: Queue Now and Queue Group Now queue statistic column headings (Continued) (Sheet 10 of 10)

Term	Abbreviated Name	Meaning
Make Busy	Make Busy	The total time that agents spent in the Make Busy state **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Occupancy	Occp	The total time that members spent in an occupied state (states other than Idle)
# Handled by 1-4	# Hndl by 1-4	The number of interactions answered by the first, second, third, and fourth agent groups **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Logged Out	Logged out	The number of agents associated with the queue but not logged in to the system. (Queue Now only) **NOTE:** For Ring Groups, this statistic displays either the number of extensions out of service or hot desk users logged out.
Logged In Not Present	Not Present	The number of agents that are logged in, but not present in the queue.

The following table lists the real-time and over-the-business-day Queue Now and Queue Group Now member statistics and their definitions.

Table 35: Queue Now and Queue Group Now member statistic column headings (Sheet 1 of 4)

Term	Meaning
State	The queue member's agent or extension state For a list of agent states, see *"Employee and Agent state indicators"*.
Name	The name of the member being monitored. The icon beside the name indicates the media type the member handles
Present	Indicates whether the member is present in the queue Presence is indicated by a colored star. A green star indicates the agent or extension is present in the queue. A gray star and gray row indicates the agent is not present in the queue.
Media Server	The media server to which the member is associated
Reporting	The reporting number of the member being monitored
Extn #	The extension where the member logged in (voice only)
Log In	The most recent time the member logged in **NOTE:** This statistic displays information for ACD path and multimedia queue members only and is not calculated for Ring Group members.
Last Event Recd	The most recent time a member event occurred
Shift Time	The total elapsed time logged for the member, calculated based on the difference between log in and last event received **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
DND Time	The duration of time where Do Not Disturb was the overriding state for the member

Table 35: Queue Now and Queue Group Now member statistic column headings (Continued) (Sheet 2 of 4)

Term	Meaning
MKB Time	The duration of time where Make Busy was the overriding state for the member **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Wrap Up Time	The duration of time where Wrap Up Time was the overriding state for the member. Wrap up time does not include any time spent making or taking interactions during the wrap up timer. **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
ACD Time	The duration of ACD interactions handled, from member pickup to completion (not including hold time)
Hold ACD Time	The duration of time ACD interactions spent on hold
Non ACD Time	The duration of Non ACD interactions handled, from member pickup to completion (not including hold time) (voice only)
Hold Non ACD Time	The duration of time Non ACD interactions spent on hold (voice only)
Out Time	The duration of time members spent handling outbound calls (voice only)
Out Hold Time	The duration of time outbound calls spent on hold, for agents (voice only)
DND Cnt	The number of times the member entered the Do Not Disturb state
MKB Cnt	The number of times the member entered the Make Busy state **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
ACD Cnt	The number of ACD interactions handled by the member

Table 35: Queue Now and Queue Group Now member statistic column headings (Continued) (Sheet 3 of 4)

Term	Meaning
Shrt ACD Cnt	The number of ACD interactions handled by the member where the handle time was less than the Short Handle parameter
Hold ACD Cnt	The number of times ACD interactions were placed on hold
Non ACD Cnt	The number of Non ACD interactions handled by the member (voice only)
Hold Non ACD Cnt	The number of times Non ACD interactions were placed on hold (voice only)
Out Cnt	The number of outbound calls made by the member (voice only)
Out Hold Cnt	The number of times outbound calls were placed on hold (voice only)
Avg Hndl	The average amount of time the members spent handling ACD interactions (ACD Time divided by ACD Count, excluding ACD Hold Time).
Agt Grp	The agent group to which the agent belongs **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Occupancy	The duration of time the member spent processing interactions
Contacts per Hour	The total ACD interaction count minus the ACD short handle count, divided by the shift time for the member
On failover	Indicates whether the primary media server is offline and has failed over to the secondary media server (voice only)
Unavail %	The percentage of time for the shift that the member was in Do Not Disturb, Make Busy, and Work Timer states
Not Present Time	The duration of time the member was logged into but not present in an agent group or Ring Group
External handle time	The duration of time the member spent handling external calls (voice only)

Table 35: Queue Now and Queue Group Now member statistic column headings (Continued) (Sheet 4 of 4)

Term	Meaning
External inbound cnt	The number of incoming external calls (voice only) **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
External outbound cnt	The number of outgoing external calls (voice only) **NOTE:** This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.

Interactive Visual Queue monitor

The Interactive Visual Queue monitor enables supervisors to monitor and control traffic in contact center queues. The Interactive Visual Queue monitor is described in detail in *"Interacting with customer interactions to improve service levels"*.

Interactive Visual Queue works in conjunction with Contact Center Client. Before you use Interactive Visual Queue, ensure your configuration in YourSite Explorer mirrors that of your telephone system.

NOTE: In order to use Interactive Visual Queue, you must enable all HCI options on Class of Service Assignment form 1 (COS 1).

Configuring options in YourSite Explorer

In YourSite Explorer, for each queue you want to monitor, you must configure the priority level and the method for handling interflowed contacts.

NOTE: If the telephone system settings and Interactive Visual Queue settings do not match, Interactive Visual Queue will not display the correct voice contact activity. For example, if Queue 1 is set to a priority of 10 on the telephone system and a priority of 20 in YourSite Configuration, Interactive Visual Queue will display voice contacts in Queue 1 as priority 20. However, the actual queue will handle the voice contacts as priority 10.

Configuring options in YourSite Explorer

In YourSite Explorer, for each queue you want to monitor, you must configure the priority level and the method for handling interflowed contacts.

NOTE: If the telephone system settings and Interactive Visual Queue settings do not match, Interactive Visual Queue will not display the correct voice contact activity. For example, if Queue 1 is set to a priority of 10 on the telephone system and a priority of 20 in YourSite Configuration, Interactive Visual Queue will display voice contacts in Queue 1 as priority 20. However, the actual queue will handle the voice contacts as priority 10.

Queue Now and Queue Group Now charts

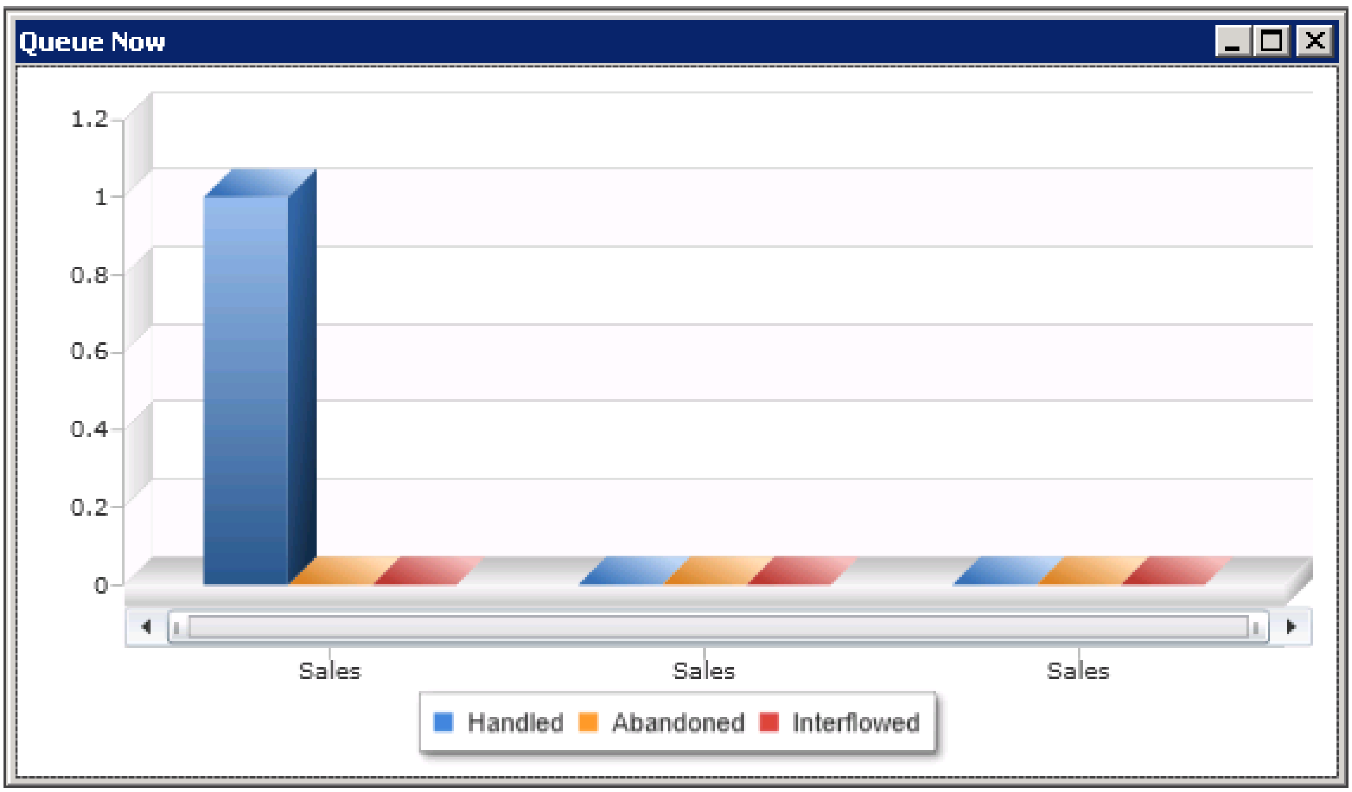
The Queue Now and Queue Group Now charts offer visual representation of Queue Now and Queue Group Now real-time statistics, grouped by the type of statistics displayed. Three different series of statistics are available to view in charts:

- **Integer**—displays numerically-based real-time statistics
- **Percentage**—displays percentage-based statistics
- **Time**—displays time-based statistics

Users can specify which statistics display in their charts. The following figure shows a Queue Now Integer Chart

NOTE: Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.

Figure 67: Queue Now (Integer chart)



The Integer chart shows:

- Handled (Default)
- Abandoned (Default)
- Interflowed (Default)
- Calls Waiting
- Agents Available
- ACD

- Idle
- Non ACD
- Outbound
- Unavailable
- Offered
- Requeue
- Total Hour
- Interflowed Last Hour
- Unavailable Last Hour
- Offered Last 15 Minutes
- Handled Last 15 Minutes
- Abandoned Last 15 Minutes
- Interflowed Last 15 Minutes
- Unavailable Last 15 Minutes
- Logged out
- Logged in not present
- # Handled by 1-4

The Percentage chart shows, by default:

- Service Level %
- Handled %
- % Handled by 1-4
- % Handled Last Hour
- Service Level % last Hour
- % Handled Last 15 Minutes
- Service Level % Last 15 Minutes
- %Abandoned
- %Abandoned Last Hour
- %Abandoned Last 15 Minutes.

Time charts show, by default:

- Longest Waiting
- Average Time to Handle
- Average Time to Abandon Minutes
- Average Talk Time
- Ttl Talk Time
- Time to Handle Last Hour
- Average Time to Handle Last Hour
- Hdnl Last 15 Min

- Average Handling Time Last 15 Minutes
- Rmt Long Wtg
- Total Work Timer minutes
- Total make busy minutes
- Total occupancy minutes

For descriptions of the statistics, see *"Queue Now and Queue Group Now monitors"*.

***NOTE:** The following statistics are for ACD path voice queues and multimedia queues only and will not display information for Ring Groups:*

- Requeue
- # Handled by 1, 2, 3, 4
- % Handled by 1, 2, 3, 4
- Total Work Timer Minutes
- Total Make Busy minutes

Queue Performance by Period and Queue Group Performance by Period charts

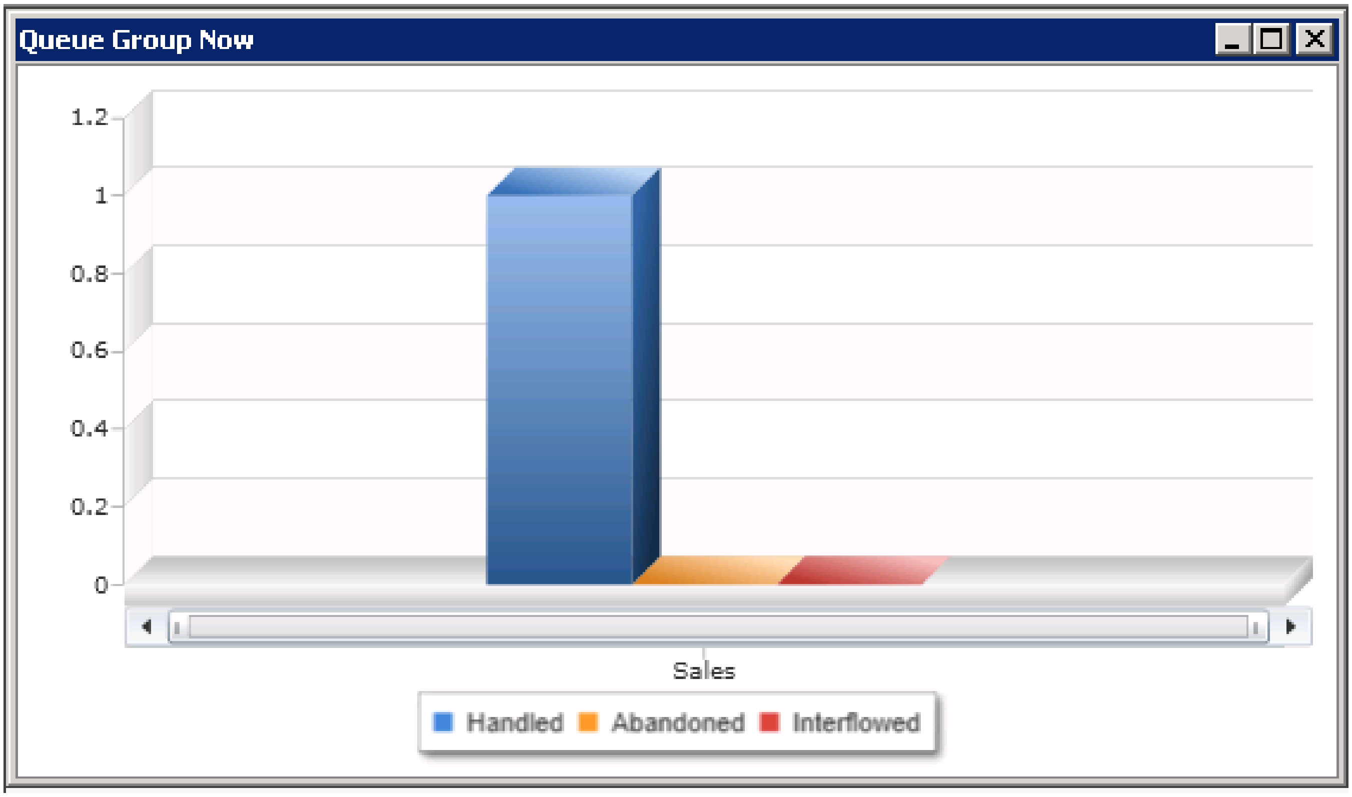
The Queue Performance by Period and Queue Group Performance by Period charts offer visual representations of Queue and Queue Group Performance by Period statistics, grouped by the type of statistic displayed. Three different series of statistics are available to view in charts:

- **Integer**—displays numerically-based real-time statistics
- **Percentage**—displays percentage-based statistics
- **Time**—displays time-based statistics

The following figure displays a Queue Performance by Period chart displaying the default statistics of the Integer series.

NOTE: Multimedia interactions in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.

Figure 68: Queue Performance by Period chart



The Integer series shows the following statistics across 15 minute intervals for queues or queue groups:

- Handled (Default)
- Interflowed (Default)
- Offered
- Short Abandoned
- Abandoned
- Requeue
- # Handled by 1-4

The Percentage series shows the following statistics across 15 minute intervals for queues or queue groups, by default:

- % Handled by 1-4
- Service Level % Today
- % Handled

The Time series show the following statistics across 15 minute intervals for queues or queue groups, by default:

- Average Time to Handle
- Average Time to Abandon
- Average Time to Interflow
- Ttl Talk Time

- Average Talk Time
- Total Work Timer minutes
- Total make busy minutes
- Total occupancy minutes

For more information for the definitions of these statistics, see "Queue by Period monitor".

NOTE: *The following statistics are for ACD path voice queues and multimedia queues only and will not display information for Ring Groups:*

- Requeue
- # Handled by 1, 2, 3, 4
- % Handled by 1, 2, 3, 4
- Total Work Timer Minutes
- Total make busy minutes

Interacting with agent presence to improve service levels

Interactive Contact Center is a feature that enables supervisors to control the availability of employees and their agents.

Using Interactive Contact Center, supervisors can

- Log employees and their agents in and out of their voice and multimedia applications
- Have agents join or leave their agent groups
- Place employees in and remove them from Make Busy
- Place employees in and remove them from Do Not Disturb
- Cancel the employee Work Timer
- Cancel the employee Reseize Timer

Using Interactive Contact Center with Contact Center Client, you can control agents on the following monitors: Agent and Employee State by Position, Agent and Employee State by Time, and Agent Shift.

Using Interactive Contact Center with Ignite (WEB), you can control agents on the following monitors: Employee State and Agent State.

Individual supervisors can be restricted through security roles from managing particular monitors and devices. For more information, consult your System Administrator.

Agent and Agent Group Presence

Employees can be enabled to handle voice, email, chat, SMS, or open media media. When an employee is enabled to handle a media type, YourSite Explorer automatically creates a corresponding agent. These multimedia agents can be assigned to agent groups, which are in turn are associated to queues.

When agent groups are created, an employee’s agents are assigned a default group presence, either Present or Absent. If an employee's default presence is Absent will be set in the Logged In Not Present agent state when they log in. To handle that media type, the employee has to manually change their agent presence in Ignite or Contact Center Client. Employees whose agents default presence is Present will be set in the Idle agent state when they log in. For details about agent states, see *"Employee and Agent state indicators"*.

Controlling employees and agents in real-time monitors

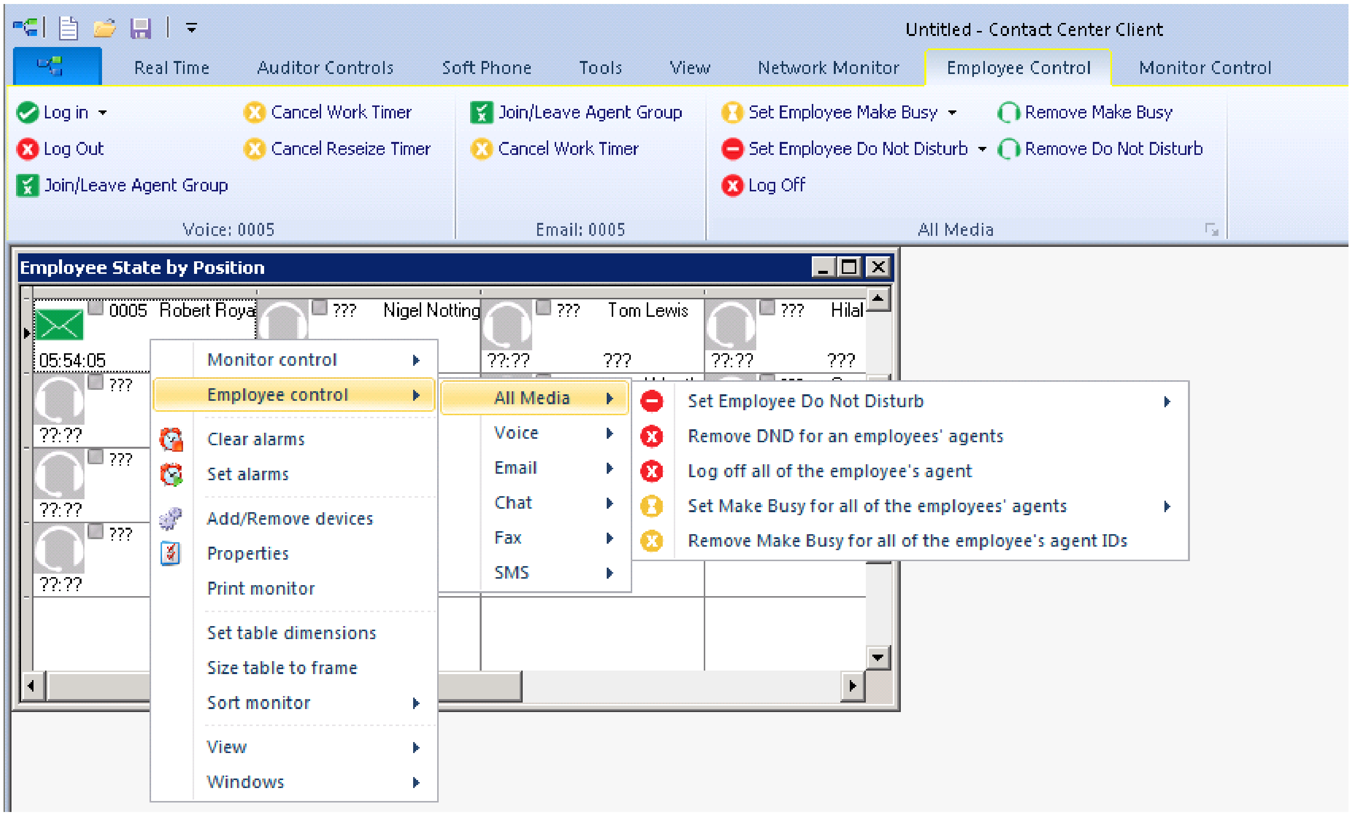
Interactive Contact Center enables supervisors, depending on their security settings, to control employees via the Contact Center Client and Ignite (WEB) employee and agent monitors. For example, if a supervisor notices a dramatic increase in the number of incoming emails in the Sales email queue, they can, using the agent monitor, remove the employee’s chat agent from their agent group in the Sales chat queue, ensuring that the employee can focus entirely on incoming emails.

Depending on whether an employee or an agent monitor is open, Contact Center Client displays two tabs in the Contact Center Client ribbon for controlling employees or their agents. Supervisors can perform actions using either a right-click and select method within the monitor or by accessing the action menu in the Employee, Agent, or Monitor Control tab views. If they have Context Sensitivity enabled for monitors, the Agent or Employee tab automatically becomes the active tab when an employee or agent is selected. If an empty cell is selected, the Monitor Control tab becomes the active tab. The following tabs are displayed with employee or agent real-time monitors:

- **Employee or Agent Control**—Employee Control gives you control over individual employees and their agents. Employee monitor controls offer supervisors the greatest flexibility in controlling an employee and all of their agents. Supervisors can manage an employee`s availability, and all of an employee`s agents, or manage specific agents belonging to individual employees. (See the following figure.)
- **Monitor Control**—Monitor Control gives you control over all of the employees or agents on a monitor, enabling simultaneous management of presence for all employees or agents. (See the following figures.)

NOTE: Context sensitivity and monitor control are not supported with Ignite (WEB). You can only alter the state for one employee or agent at a time.

Figure 69: Employee State by Position - Employee Control tab options



Supervisors can control employees on the following Contact Center Client monitors:

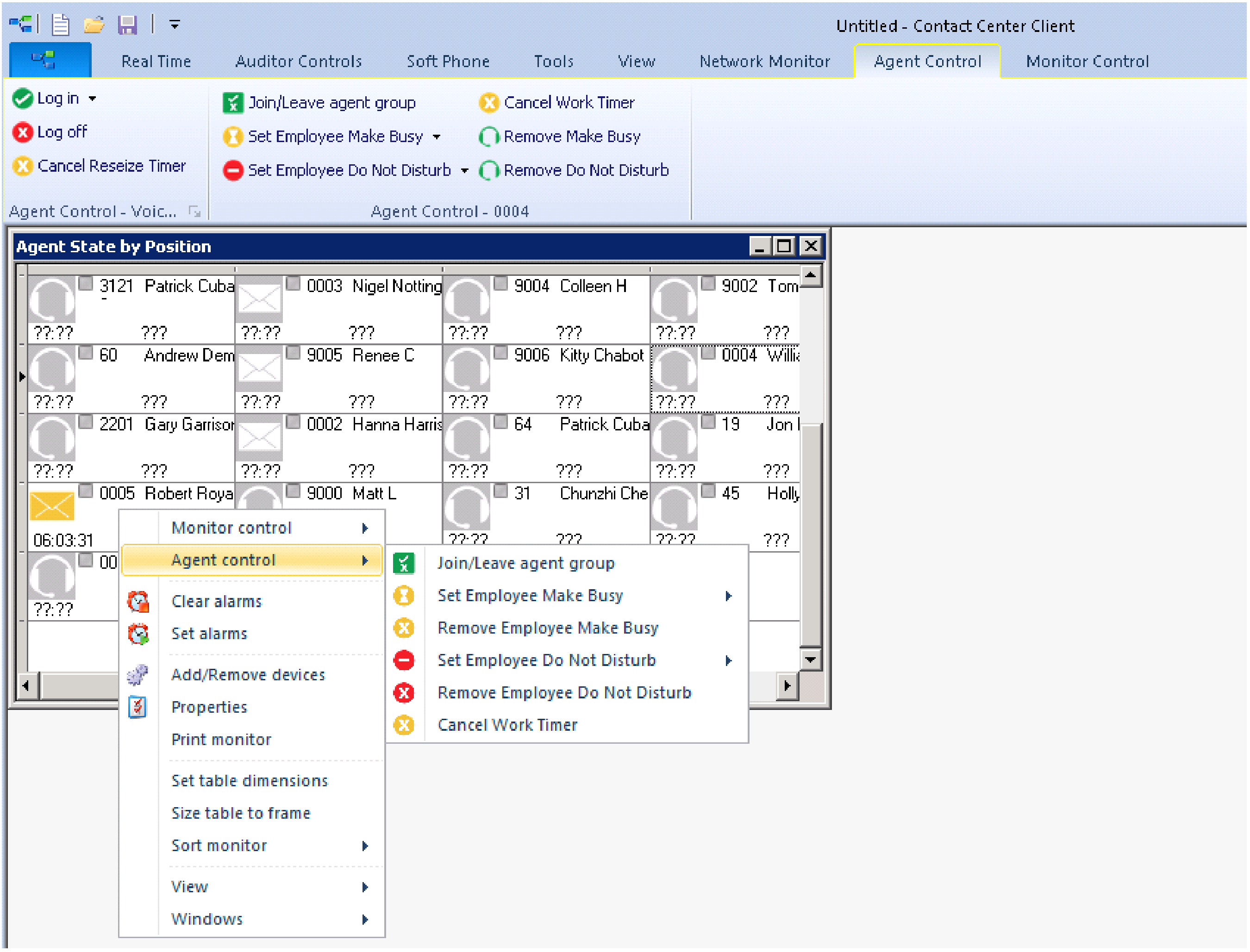
- Employee State by Position
- Employee State by Time

Supervisors can control employees on the following Ignite (WEB) monitor:

- Employee State

Agent Control gives you control over individual agents in an agent monitor. Agent monitor controls enable supervisors a more targeted look at specific aspects of an employee`s presence, enabling supervisors to limit their influence to specific agents or media types. Since agent monitors enable supervisors to view agents by agent group, Agent Control enables supervisors to better manage their agent groups. (See the following figure.)

Figure 70: Agent State by Position - Agent Control tab options



Supervisors can control agents on the following Contact Center Client monitors:

- Agent State by Position
- Agent State by Time
- Agent State by Time for Queue
- Agent Shift

Supervisors can control agents on the following Ignite (WEB) monitor:

- Agent State

Figure 71: Employee State by Position - Monitor Control tab options

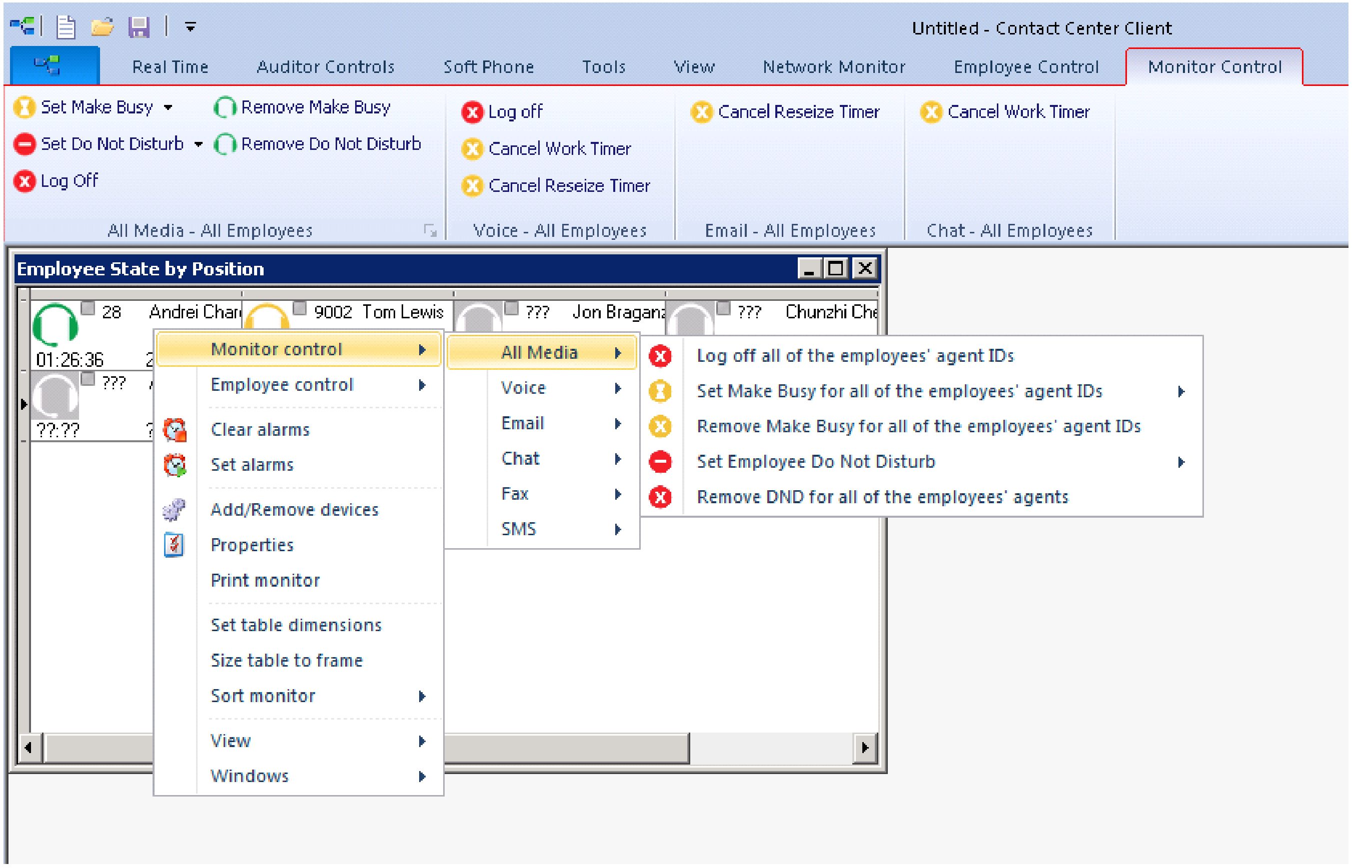
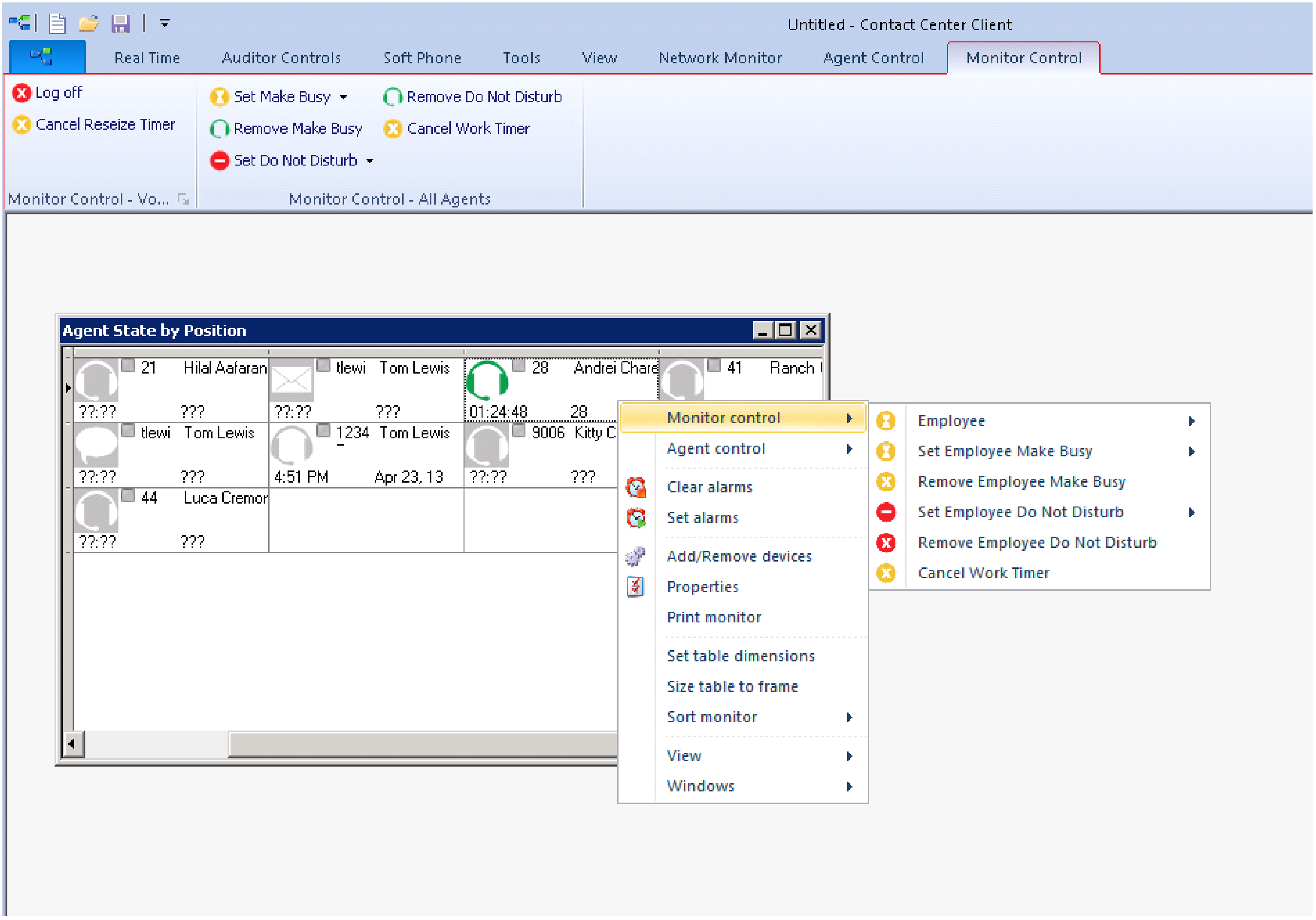


Figure 72: Agent State by Position - Monitor Control tab options



Logging on an agent - Contact Center Client

NOTE:

- An ACD Hot Desking Agent must enter an extension number each time the agents logs on to the ACD routing system using Interactive Contact Center. The agent cannot rely on the extension number last used when logging on. This is because the ACD data stream unifies the agent ID and the extension. After a Hot Desking Agent logs on or off of the ACD routing system using Interactive Contact Center, sometimes the Interactive Contact Center agent controls are not available to the agent for two to five minutes.
- You will be unable to log on an agent to the system if there are no available user licenses.
- If your contact center participates in the use of PINs, supervisors with the correct Class of Service do not require an agent's PIN to interactively log in a Hot Desking Agent.
- Depending on security roles and telephone switch settings, employees who are licensed as Advanced Supervisor or System Administrator may not be prompted to enter a PIN when logging into Interactive Contact Center, Softphone, or PhoneSet Manager.
- If a Hot Desking Agent logs into an extension that serves as the overflow point for a Ring Group, calls to that Ring Group will not be offered to the extension and will remain queued or ringing until abandoned or answered.

- Hot desking users logging into a Ring Group extension must also be a member of the Ring Group to ensure accurate reporting.

You log employee voice agents in and out in either an open Employee or Agent Monitor in Contact Center Client. Multimedia agents are not logged in with voice agents.

To log in an agent in an open Employee monitor

- Right-click the cell of an employee and click **Employee control > Log in > voice agent**. Alternatively, select the employee cell in an open monitor, click **Log** in from the **Employee Control** tab on the Contact Center Client ribbon, and select the voice agent.

  NOTE: When you log in an employee's voice agent, you must enter the extension for the agent. See the procedure below.

To log in an agent by extension in an open Employee monitor

1) Right-click the cell of an employee and click **Employee control > Log in > By extension**.
2) If the employee has multiple voice agents, select the agent to log in from the drop-down list.
3) Type the **Agent's extension**.
4) Click **OK**.

To log in an agent in an open Agent monitor

- Right-click the cell of a voice agent who is not logged into and click **Agent Control > Log in > voice agent**. Alternatively, select the agent cell in an open monitor and click **Log in** from the Contact Center Client ribbon.

  NOTE: When you log in a voice agent, you must enter the extension for the agent. See the procedure below.

To log in an agent by extension in an open Agent monitor

1) Right-click the cell of a voice agent and click **Agent control > Log in > By extension**.
2) If the employee has multiple voice agents, select the agent to log in from the drop-down list.
3) Type the **Agent's extension**.
4) Click **OK**.

Logging off an agent - Contact Center Client

You can log off an employee from all media in an Employee monitor or Agent monitor. Logging off an agent logs off all of the employee's voice agents and sets the employee's multimedia agents to Absent in all their agent groups. If the employee is logged into their soft phone in Contact Center Client, they will also be logged out of the soft phone.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To log off all of an employee's agents in an open Employee monitor

- Right-click the cell of an employee and click **Employee control > Log off**. Alternatively, select the employee cell in an open monitor and click **Log Off** from the **Employee Control** tab on the Contact Center Client ribbon.

To log off an agent in an open Agent monitor

NOTE: Logging off an employee's agent logs off all of the employee's agents simultaneously.

- Right-click the cell of an agent and click **Agent control > Log off**. Alternatively, select the agent cell in an open monitor and click **Log Off** from the **Agent Control** tab on the Contact Center Client ribbon.

To log off all employees' agents in an open Employee monitor

1) Right-click the monitor and click **Monitor control > Log off**.

   *Alternatively, click the **Monitor Control** tab in the Contact Center Client ribbon and select **Log Off**.*

2) Click **Yes**.

To log off all agents in an open Agent monitor

1) Right-click the monitor and click **Monitor control > Log off**.

   *Alternatively, click the **Monitor Control** tab in the Contact Center Client ribbon and select **Log Off**.*

2) Click **Yes**.

Logging on an agent - Ignite (WEB)

When you log on an agent in Ignite (WEB), you make them available to receive voice interactions.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To log on a voice agent

1) In the monitor, select the agent you want to log on.
2) Click **State > Available**.
3) Enter the agent’s extension and PIN (if enabled) and click **Login**.

   NOTE: This step is not required if the agent is set to automatically log in when the ‘Available’ state is selected.

Logging off an agent - Ignite (WEB)

When you log off an agent in Ignite (WEB), you make them unavailable to receive all media interactions, including voice, email, chat, SMS, and open media.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To log off an agent

1) In the monitor, select the agent you want to log off.
2) Click **State > Offline**.

Joining and leaving agent groups - Contact Center Client

After logging into Contact Center Client, agents can use Interactive Contact Center to control their presence status in agent groups. Optionally, supervisors can use Interactive Contact Center to control the presence status of agents in specific agent groups.

NOTE:

- An agent's ACD hot desk line remains in service while they are logged in as an ACD hot desk user even if they are not present in any ACD groups and not receiving ACD calls.

To join an agent to or have an agent leave an agent group in an open Employee monitor

1) Right-click the cell of an employee and click **Employee control > Join/Leave Agent Group > [Agent]**.

   *Alternatively, select the cell of an employee and in the **Employee Control** tab of the Contact Center Client ribbon, click **Join/Leave agent group > [Agent]**.*

2) Select the agent group(s) to which you want the employee's agent(s) to join or deselect the agent group(s) to have the employee's agent(s) leave the agent groups.

3) Click **OK**.

To join an agent to or have an agent leave an agent group in an open Agent monitor

1) Right-click the cell of an agent who is logged on and click **Agent control > Join/Leave Agent Group**.

   *Alternatively, select the cell of an agent and click **Join/Leave Agent Group** from the Agent Control tab in the Contact Center Client ribbon.*

2) Select the agent group(s) to which you want the agent(s) to join or deselect the agent group(s) to which you want the agent(s) to leave.

3) Click **OK**.

Joining and leaving agent groups - Ignite (WEB)

After signing into Ignite (WEB) and logging into their phone, agents can use interactive Contact Center to control their presence in agent groups. Optionally, supervisors can use Interactive Contact Center to control the presence status of agents in specific agent groups from within the Agent and Employee State monitors in Ignite (WEB).

The following procedures take place in either an Agent State or Employee State monitor in Ignite (WEB).

To join an agent to an agent group

1) In the monitor, select the agent for which you want to modify agent group presence.
2) Click **Agent Groups**.
3) Hover over the agent group's avatar and select **Join All**.
4) Click **Update**.

To remove an agent from an agent group

1) In the monitor, select the agent for which you want to modify agent group presence.
2) Click **Agent Groups**.
3) Hover over the agent group's avatar and select **Leave All**.
4) Click **Update**.

To join an agent to or remove an agent from all agent groups

1) In the monitor, select the agent for which you want to modify agent group presence.
2) Click **Agent Groups**.
3) To join an agent to all agent groups, click **Join All > Update**.
4) To remove an agent from all agent groups, click **Leave All > Update**.

To make an agent available or unavailable to answer interactions of a specific media type

1) In the monitor, select the agent for which you want to modify agent group presence.
2) Click **Agent Groups**.
3) To become available to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in blue.
4) To become unavailable to answer interactions of a specific media type, click the media icon in the agent group so the icon displays in grey.
5) Click **Update**.

Placing employees in Make Busy - Contact Center Client

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing employees into Make Busy places both employees and all of their agents into Make Busy.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To place an employee in an open Employee monitor in Make Busy

- Right-click the cell of an employee and click **Employee control > Set Make Busy >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Employee Make Busy >** reason code from the **Employee Control** tab in the Contact Center Client ribbon.

To place all employees in an open Employee monitor in Make Busy

1) Right-click the monitor and click **Monitor control > Set Make Busy >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Make Busy >** reason code from the **Monitor Control** tab in the Contact Center Client ribbon.
2) Click **Yes**.

To place an employee in an open Agent monitor in Make Busy

- Right-click the cell of an agent and click **Agent control > Set Employee Make Busy >** reason code. Alternatively, select the agent cell in an open monitor and click **Set Employee Make Busy >** reason code from the Agent Control tab in the Contact Center Client ribbon.

To place all employees in an open Agent monitor in Make Busy

1) Right-click the monitor and click **Monitor control > Set Employee Make Busy >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Make Busy >** reason code from the **Monitor Control** tab in the Contact Center Client ribbon.
2) Click **Yes**.

Removing employees from Make Busy - Contact Center Client

Removing employees from Make Busy removes both employees and all of their agents from Make Busy.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To remove an employee in an open Employee monitor from Make Busy

- Right-click the cell of an employee whose agents are in Make Busy and click **Employee control > Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Employee Control** tab in the Contact Center Client ribbon.

To remove all employees in an open Employee monitor from Make Busy

1) Right-click the cell of an employee who is in Make Busy and click **Monitor control > Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Monitor Control** tab in the Contact Center Client ribbon.
2) Click **Yes**.

To remove an employee in an open Agent monitor from Make Busy

- Right-click the cell of an agent in Make Busy and click **Agent control > Remove Make Busy**. Alternatively, select the agent cell in an open monitor and click **Remove Make Busy** from the **Agent Control** tab in the Contact Center Client ribbon.

To remove all employees in an open Agent Monitor from Make Busy

1) Right-click the cell of an employee and click **Monitor control > Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the Monitor Control tab in the Contact Center Client ribbon.
2) Click **Yes**.

Placing employees in Busy - Ignite (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing an employee into Busy places them in Busy across all media types for which they answer interactions. While in Busy, they can receive transferred multimedia interactions, however, inbound multimedia interactions will not be routed to them. They can also receive Non ACD voice interactions and pick interactions waiting in queue.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To place an employee in Busy

1) In the monitor, select the employee you want to place in Busy.
2) Click **State > Busy…**.
3) Choose a Busy code.

Removing employees from Busy - Ignite (WEB)

Removing employees from Busy re-enables them to answer inbound multimedia interactions and ACD calls.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Busy

1) In the monitor, select the employee you want to remove from Busy.
2) Under **State**, select an alternate state, or, click **X** button next to **Busy...** to remove the busy code.

NOTE: Select **Available** if you want to make them available to receive interactions.

Placing employees in Do Not Disturb - Contact Center Client

NOTE:

- If an agent on an ACD calls puts themselves into MKB or DND, Work Timer events are not received for that call.
- Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing employees into Do Not Disturb places employees and all of their agents into Do Not Disturb.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To place an employee in an open Employee monitor in Do Not Disturb

- Right-click the cell of an employee and click **Employee Control > Set Do Not Disturb >** reason code. Alternatively, select the employee cell in an open monitor and click **Set Employee Do Not Disturb >** reason code.

To place all employees in an open Employee Monitor in Do Not Disturb

1) Right-click the monitor and click **Monitor control > Set Do Not Disturb >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.
2) Click **Yes**.

To place an employee in an open Agent monitor in Do Not Disturb

- Right-click the cell of an agent who is logged on and click **Agent control > Set Employee Do Not Disturb >** reason code. Alternatively, select the agent cell in an open monitor and click **Set Do Not Disturb >** reason code from the Agent Control tab in the Contact Center Client ribbon.

To place all employees in an open Agent monitor in Do Not Disturb

1) Right-click the monitor and click **Monitor control > Set Do Not Disturb >** reason code. Alternatively, select an empty cell in an open monitor and click **Set Do Not Disturb** from the Monitor Control tab in the Contact Center Client ribbon.
2) Click **Yes**.

Removing employees from Do Not Disturb - Contact Center Client

Removing employees from Do Not Disturb removes employees and all of their agents from Do Not Disturb.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To remove an employee in an open Employee monitor from Do Not Disturb

- Right-click the cell of an employee who is in Do Not Disturb and click **Employee control > Remove Do Not Disturb**. Alternatively, select the employee cell in and click **Remove Do Not Disturb** from the **Employee Control** tab in the Contact Center Client ribbon.

To remove all of a monitor’s employees in an open Employee monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control > Remove Do Not Disturb**. Alternatively, select an empty cell in an open monitor and click **Remove Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

To remove an employee in an open Agent monitor from Do Not Disturb

- Right-click the cell of an agent who is in Do Not Disturb and click **Agent control > Remove Do Not Disturb**. Alternatively, select the agent cell in an open monitor and click **Remove Do Not Disturb** from the **Agent Control** tab in the Contact Center Client ribbon.

To remove all of a monitor’s employees in an open Agent monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control > Remove Do Not Disturb**. Alternatively, select an empty cell in an open monitor and click **Remove Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

Placing employees in Do Not Disturb - Ignite (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

Placing an employee into Do Not Disturb places them in Do Not Disturb across all media types for which they answer interactions. While in Do Not Disturb, they are unable to receive inbound multimedia interactions and internal voice interactions, including transfers.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To place an employee in Do Not Disturb

1) In the monitor, select the employee you want to place in Do Not Disturb.
2) Under **State**, click **Do Not Disturb….**
3) Choose a DND code.

Removing employees from Do Not Disturb - Ignite (WEB)

Removing employees from Do Not Disturb re-enables them to receive interactions for all applicable media types.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Do Not Disturb

1) In the monitor, select the employee you want to remove from Do Not Disturb.
2) Under **State**, select an alternate state, or, click **X** button next to **Do Not Disturb...** to remove the DND Reason code.

NOTE: Select **Available** if you want to make them available to receive interactions.

Canceling Work Timer for employees - Contact Center Client

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

In an Employee monitor or Agent monitor, you can cancel Work Timer for one or more employees. The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To cancel Work Timer in an open Employee monitor

- Right-click the cell of an employee who is in Work Timer and click **Employee control > Cancel Work Timer**. Alternatively, select the employee cell in an open monitor and click **Cancel Work Timer** in the appropriate media section of the **Employee Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for all employees in an open Employee monitor

- Right-click the monitor and click **Monitor control > Cancel Work Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Work Timer** in the media type's section of the **Monitor Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for an employee in an open Agent monitor

- Right-click the cell of an agent who is in Work Timer and click **Agent control > Cancel Work Timer**. Alternatively, select the agent cell in an open monitor and click **Cancel Work Timer** from the **Agent Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for all employees in an open Agent monitor

- Right-click the monitor and click **Monitor control > Cancel Work Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Work Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

Canceling Work Timer for employees - Ignite (WEB)

NOTE: Employees in Work Timer can apply Busy/Make Busy or DND, but will remain in a Work Timer state until the Work Timer expires or is cancelled. If Classification Codes are required for the queue and the Work Timer expires without a Classification Code being entered, a **Non-Compliant** Classification Code will be applied to the call..

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Work Timer

1) In the monitor, select the employee you want to remove from Work Timer.
2) Click **State** and select an alternate state.

NOTE: Select **Available** if you want to make them available to receive interactions.

Canceling Reseize Timer for voice agents

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To cancel Reseize Timer for an employee's voice agent in an open Employee monitor

- Right-click the cell of an employee who is in Reseize Timer and click **Employee control > Cancel Reseize Timer**. Alternatively, select the employee cell in an open monitor and click **Cancel Reseize Timer** in the appropriate media section of the **Employee Control** tab in the Contact Center Client ribbon.

To cancel Reseize Timer for all employee voice agents in a monitor in an open Employee monitor

- Right-click the monitor and click **Monitor control > Cancel Reseize Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Reseize Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

To cancel Reseize Timer for an employee's voice agent in an open Agent monitor

- Right-click an agent who is in Reseize Timer and click **Agent control > Cancel Reseize Timer**. Alternatively, select the agent cell in an open monitor and click **Cancel Reseize Timer** in the appropriate media section of the **Agent Control** tab in the Contact Center Client ribbon.

To cancel all of the voice agents on a monitor in the Reseize Timer state in an open Agent monitor

- Right-click the monitor and click **Monitor control > Cancel Reseize Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Reseize Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

Controlling the availability of voice queues

Using Interactive Contact Center and Contact Center Client, you can control the availability of voice queues on the Queue Now or Queue Group Now monitor. Multimedia queues cannot be controlled using Interactive Contact Center and Contact Center Client. For information on controlling voice queues, see the Interactive Contact Center chapter of the *MiContact Center Business User Guide*.

Extension Control

Using Interactive Contact Center and Contact Center Client, you can control extensions on the following monitors:

- Extension State by Position
- Extension Now

Extension Control gives you control over individual extensions. Monitor Control gives you control over all the extensions on a monitor. All of the extensions on the monitor are affected by the action you take. You can perform actions using either a right-click and select method within the monitor or by selecting an extension or an empty cell (monitor control) and accessing the action menu in the Extension or Monitor Control tabs in the ribbon. (See the following figure.)

Figure 73: Extension State by Position – Extension Control tab

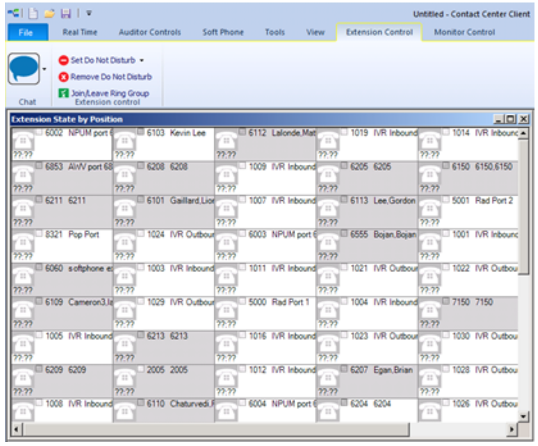
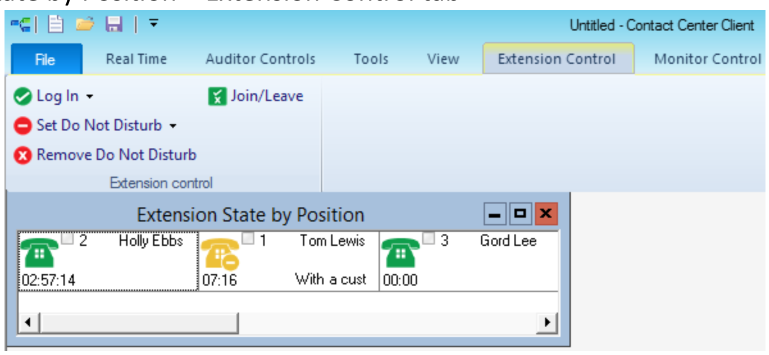


Figure 74: Extension State by Position – Extension Control tab



Ring Group presence

If you are licensed for Ring Groups, extensions can join and leave Ring Groups via Interactive Contact Center.

Extensions can be assigned to multiple Ring Groups. Within a Ring Group, an extension can be set to Present, enabling it to receive calls, or Absent, ensuring that calls are not offered to the extension. By default, extensions are set to Present. Supervisors can manually change the extension presence in Contact Center Client.

Joining and leaving Ring Groups

Interactive Contact Center can be used to control the presence of extensions in Ring Groups.

The following procedures take place in an open Extension monitor in Contact Center Client.

To join an extension to or remove an extension from a Ring Group

1) Right-click the cell of an extension and click **Extension control > Join/Leave**.

   *Alternatively, select the cell of an extension and in the **Extension Control** tab of the **Contact Center Client** ribbon, click **Join/Leave**.*

2) Select the Ring Group(s) to which you want the extension to join or deselect the Ring Group(s) to have the extension leave the Ring Group(s).

3) Click **OK**.

Placing an extension in Do Not Disturb

The following procedures take place in an open Extension monitor in Contact Center Client.

To place an extension in Do Not Disturb

- Right-click the cell of an extension and click **Extension control > Set Do Not Disturb > reason code**. Alternatively, select the Extension Control tab and select **Set Do Not Disturb > reason code**.

To place all extensions into Do Not Disturb in an open monitor

1) Right-click the cell of an extension and click **Monitor control > Set Do Not Disturb > reason code**.
   *Alternatively, select the **Monitor Control** tab and select **Set Do Not Disturb > reason code**.*
2) Click **Yes**.

Removing an extension from Do Not Disturb

The following procedures take place in an open Extension monitor in Contact Center Client.

To remove an extension from Do Not Disturb

- Right-click the cell of an extension in **Do Not Disturb** and click **Extension control > Remove Do Not Disturb**.
  *Alternatively, select the **Extension Control** tab and select **Remove Do Not Disturb**.*

To remove all extension from Do Not Disturb in an open monitor

- Right-click the cell of an extension and click **Monitor control > Remove Do Not Disturb**.
  *Alternatively, select the **Extension Control** tab and select **Remove Do Not Disturb**.*

Queue Control

You can manually place queues in or out of Do Not Disturb using the Queue Now monitor in Contact Center Client.

Queues can be automatically set to open and close or go in and out of Do Not Disturb using queue schedules and queue control plans. These are administrative settings. For more information see the *MiContact Center Business Installation and Administration Guide*.

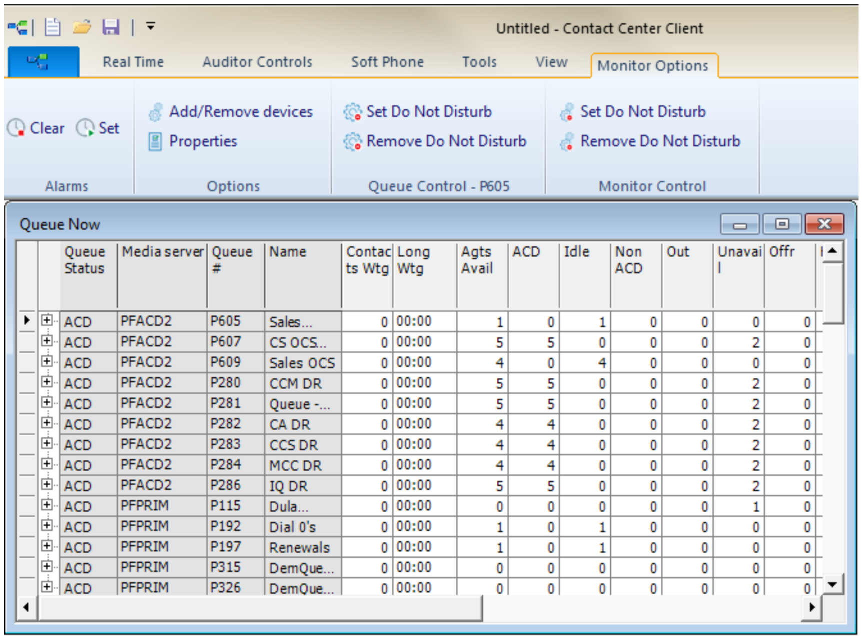
Manually controlling queues

Queue control enables you to control individual queues. Monitor control enables you to control all of the queues on a monitor.

The Monitor Options tab displays in the ribbon for the Queue Now monitor. You can perform actions using either a right-click and select method in the open monitor or by accessing the action menu in the Monitor Options ribbon. (See the following figure.)

NOTE: Manual queue control overrides administrative settings for queue schedules and queue control plans.

Figure 75: Queue Now monitor - Monitor Options tab



Placing queues in Do Not Disturb

Using manual queue control, you can place queues in and remove queues from Do Not Disturb on the Queue Now monitor. A contact will not enter a queue that is in Do Not Disturb. Instead the contact is sent to an unavailable answer point if one is configured for the queue.

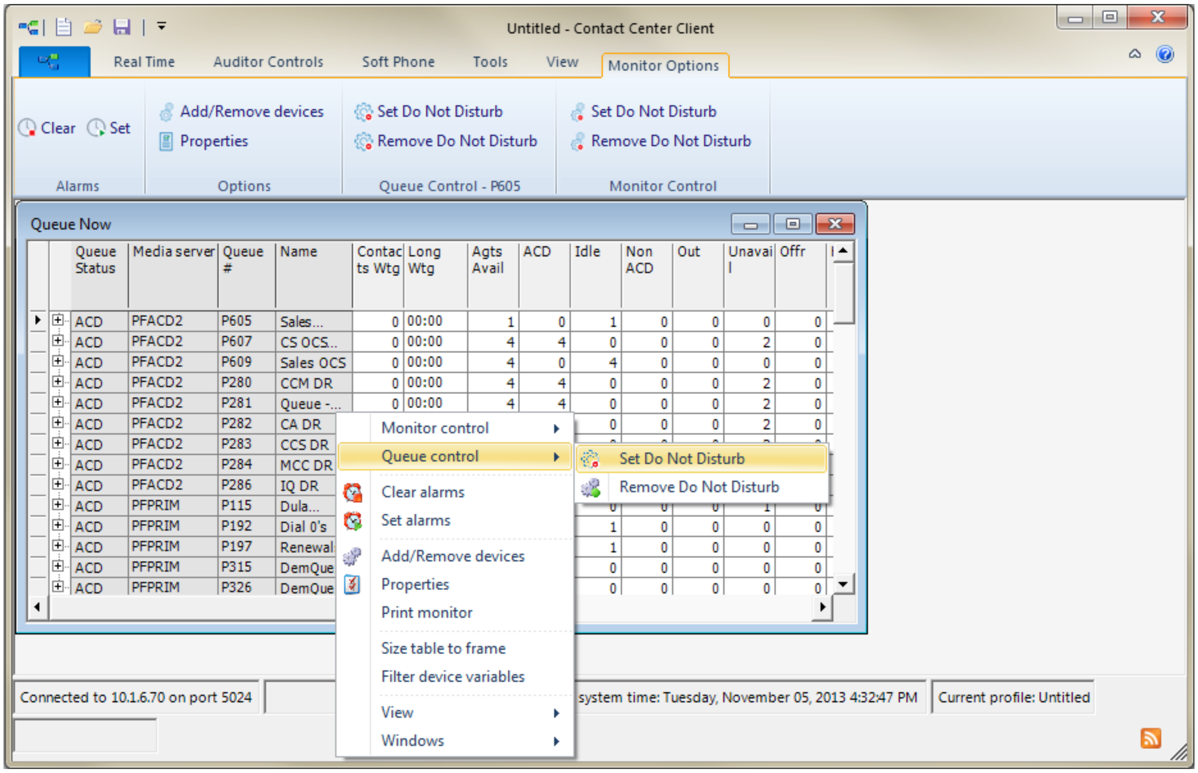
NOTE: Putting a Ring Group into Do Not Disturb removes the presence of all of its members.

To place a queue in Do Not Disturb

- Right-click the cell of an active queue and click **Queue control > Set Do Not Disturb**. Alternatively, select the queue in an open Queue Now monitor and click **Set Do Not Disturb** from the Monitor Option tab in the Contact Center Client ribbon.

  See the following figure.

Figure 76: Placing a queue in Do Not Disturb



To place all of the queues on a monitor in Do Not Disturb

- Right-click the monitor and click **Monitor control > Set Do Not Disturb**. Alternatively, select an open Queue Now monitor and click **Set Do Not Disturb** from the Monitor Option tab in the Contact Center Client ribbon.

Removing queues from Do Not Disturb

To remove a queue from Do Not Disturb

- Right-click the cell of a queue that is in Do Not Disturb and click **Queue control > Remove Do Not Disturb**. Alternatively, select the queue in an open Queue Now monitor and click **Remove Do Not Disturb** from the Monitor Option tab in the Contact Center Client ribbon.

To remove all of the queues on a monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control > Remove Do Not Disturb**. Alternatively, select an open Queue Now monitor and click **Remove Do Not Disturb** from the Monitor Option tab in the Contact Center Client ribbon.

Interactive Visual Queue

Interactive Visual Queue is a Contact Center Client real-time monitor that enables supervisors to both monitor and control the content in contact center queues. With Interactive Visual Queue monitors open, supervisors can monitor the contents of queues and queue groups, easily move interactions between queues, assign interactions to agents, and proactively remove unwanted interactions from the queues.

Interactive Visual Queue includes a Queued media grid and an Abandoned media grid. In the Queued media grid, supervisors and agents can view calls within queues and then use a drag-and-drop operation to move calls from busy queues to less active queues. In the Abandoned media grid, supervisors can view abandoned call information, including the caller name, phone number, and time of the abandoned call. Agents can use the Abandoned media grid to call back abandoned callers.

Ring Groups are not supported with Interactive Visual Queue and any queue groups displayed in Interactive Visual Queue will not display calls in the Ring Group queues.

The following sections explain how to use Interactive Visual Queue to monitor call activity, redirect calls, manage abandoned calls, configure alarms, and view callback information. For information on using Interactive Visual Queue to manage multimedia interactions, see the *Multimedia Contact Center Installation and Deployment Guide*.

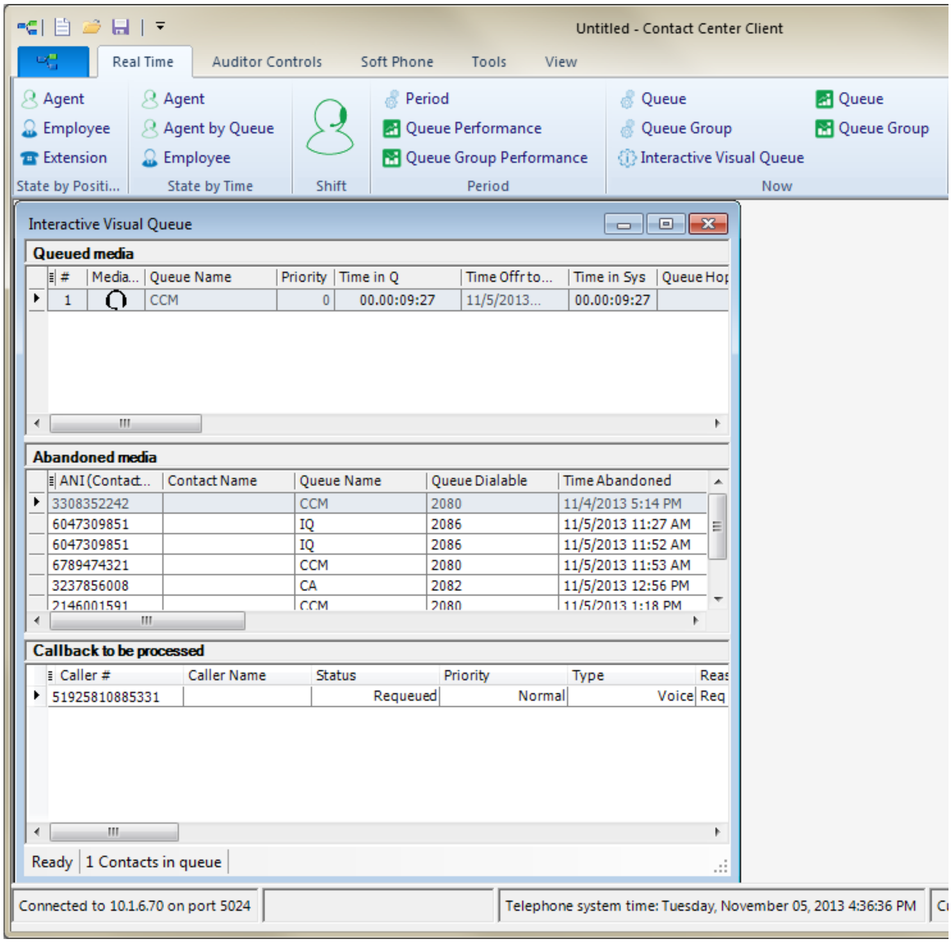
Accessing Interactive Visual Queue

You access Interactive Visual Queue by logging on to Contact Center Client and then opening the Real-time toolbar.

To open an Interactive Visual Queue monitor

1) Log on to Contact Center Client.
2) In the Contact Center Client ribbon, click **Real time**.
3) Click **Interactive Visual Queue**.
   The Add/Remove device IDs window opens.
4) Select a queue from the Queues list and click **OK**.
   See the following figure.
   NOTE: Virtual queue groups are shown in the Queue groups list.

Figure 77: Interactive Visual Queue monitor



Interactive Visual Queue monitor grids

The Interactive Visual Queue monitor includes the Queued media grid and the Abandoned media grid. The Queued media grid lists the calls that are currently in the selected queues or queue groups. The Abandoned media grid lists abandoned calls. The calls are listed in order of priority and the columns can be sorted. You can configure the column headings and specify which columns are displayed. Depending on licensing, Interactive Visual Queue includes the Callback to be processed grid, which lists callbacks.

NOTE: The abandoned calls column in the Interactive Visual Queue monitor displays all abandoned calls except those abandoned while ringing an agentor extension. The abandoned column in the Queue Now monitor does not peg short abandons as abandoned calls, but does peg calls that are abandoned while ringing an agentor extension if they do not peg as a short abandon. Because of these differences, you may notice discrepancies between the abandoned call information in these two monitors.

The following list provides descriptions of the column headings available in the Queued media grid:

- *Position (#)* displays the answer position relative to other interactions in the queue
- *Media icon* displays the media type
- *Queue Name* is the name of the queue
- *Queue Dialable* displays:
  - Voice—the dialable number of the queue

  - Chat—Queue Auto Response User Name
  - Email—Email address of the queue
  - SMS--the dialable number of the queue

- *Priority* is the priority of the interaction in the queue (the lower the number, the higher the priority)
- *Time in Queue* is the interaction's total time in the current queue
- *Time Offered to System* is the time the interaction first entered the system
- *Time in System* is the interaction's total time in the system
- *Queue Hops* is the number of times an interaction has changed queues
- *ANI (Contact ID)* displays:
  - Voice—caller # / ANI
  - Chat—Chat email address from pre-chat form
  - Email—From email address
  - SMS—caller # / ANI

- *Subject* displays
  - Voice—blank
  - Chat—Chat subject from pre-chat form
  - Email—Email subject
  - SMS—blank

- *Is Callback* indicates if the queued media is a callback request (voice only)
- *Service level countdown* provides a countdown in seconds when the contact will exceed the target time to meet the service level
- *Contact Name* is the name associated with the contact (if available)
  - Voice—caller ID
  - Chat—Chat name from pre-chat form
  - Email—Email “From” name, if available
  - SMS—caller #

- *Time Offered to Queue* is the time the contact entered the current queue
- *DNIS (To Address)* displays
  - Voice—DNIS Number
  - Chat—blank
  - Email—receiver's email address
  - SMS—blank

- *To Name* displays
  - Voice—DNIS Name, if configured in YourSite Explorer for the associated DNIS number
  - Chat—blank
  - Email—Email “To” name, if available
  - SMS—blank

- *Collected Information* displays the single or series of collected results provided by IVR Routing. Collected information requires IVR Routing and, optionally, Remote Database Verification or CTI Developer Toolkit
- *Queue Reporting* is the queue's reporting number

The following list provides descriptions of the column headings available in the Abandoned media grid:

- *ANI (Contact ID)* displays caller # / ANI
- *Contact Name* is the caller ID associated with the contact (if available)
- *Queue Name* is the name of the queue
- *Queue Dialable* displays the dialable number of the queue
- *Time Abandoned* is the time at which the contact abandoned the queue
- *Time Since Abandoned* is the elapsed time since the contact abandoned the queue
- *Last Callback Employee* is the employee name and employee ID associated with the most recent callback attempt
- *Last Callback Time* is the time at which the most recent callback was attempted
- *Time Since Last Callback* is the elapsed time since the most recent callback attempt
- *Time Offered to Queue* is the time the contact entered the current queue
- *Time in Queue* is the contact's total time in the current queue
- *Time Offered to System* is the time the contact first entered the system
- *Time in System* is the contact's total time in the system
- *Queue Hops* is the number of times a contact has changed queues
- *Is Callback* indicates if the queued media is a callback request (voice only)
- *Service level countdown* provides a countdown in seconds when the interaction will exceed the target time to meet the service level
- *DNIS (To Address)* displays the DNIS number
- *To Name* displays the DNIS name, if configured in YourSite Explorer for the associated DNIS number
- *Subject* displays DNIS
- *Collected Information* displays the single or series of collected results provided by IVR Routing. Collected information requires IVR Routing, Verified Collected Digits and, optionally, Remote Database Verification or CTI Developer Toolkit
- *Queue Reporting* is the queue's reporting number
- *Media icon* displays the media type

The following list provides descriptions of the column headings available in the Callback to be processed grid:

- *Caller #* displays the phone number provided by the contact
- *Caller Name* displays the contact's name
- *Status* displays the state of the callback
  - New request
  - In progress
  - Requeued

  - Completed
  - Unknown
- *Priority* the importance level of the callback
  - Voice—Normal
  - Web—Normal
  - Abandoned—Low
- *Type* displays the type of callback
  - Voice
  - Web
  - Abandoned
- *Reason* displays the callback’s reason for its current status
- *Attempted Calls to Agent* displays the number of times the agent attempted the callback
- *Last Time Agent Attempted* displays the last time the agent attempted the callback
- *Request Time* the specific time at which the callback is scheduled to be processed; this field is populated when the callback is requeued
- *Time Received* displays the specific time the caller submitted the callback request
- *Web IP Address* displays the IP address of the contact who submitted the callback request
- *Last Attempted Call To Client* displays the specific time the last callback attempt to the caller was made
- *Attempted Calls To Client* displays the number of times the callback was attempted
- *Client Available From* displays the earliest time the contact is available to receive the callback
- *Client Available To* displays the latest time the caller is available to receive the callback
- *ANI* displays the phone number of the caller
- *DNIS* displays the phone number the caller dialed
- *Dialable* displays the number of the device that will handle the callback
- *Device Name* displays the name of the device that will handle the callback
- *Device Type* displays the type of device that will handle the callback – extension,agent, or queue
- *Recorded* Message displays a hyperlink to the voice callback request .wav file left by the caller
- *Area* displays the state, province, or other area the call originated from
- *Country* displays the country the call originated from
- *Endpoint* displays the endpoint attempting to perform the callback
- *Region* displays the region the call originated from

Sorting contacts by columns

Monitor columns can be used to sort contacts in Interactive Visual Queue. You can only sort by one column in a grid at a time. By default, the Queued media grid is sorted by Position number. Sort preferences are preserved in your Contact Center Client profile.

To sort contacts by columns in the Interactive Visual Queue monitor

- Click on the column heading by which you want to sort.
  To reverse the sort order, click on the column again.

Redirecting calls

A call can move between queues automatically (interflow) or manually (redirection).

Interflow

You can configure queue settings on the telephone system to automatically move a call from one queue to another after a specific duration. For example, you can configure your system to move a call from Queue 1 to Queue 2 if the call has not been answered within 30 seconds. Interflow occurs without any user interaction.

Redirection

Using Interactive Visual Queue, you can manually redirect a call from a queue to another queue or a dialable number.

There are two ways a call can be removed from the system. If a call is moved more than 10 times, either by redirection or by interflow, the call is dropped from the system. You can see the current number of times a call has moved between queues in the Queue Hops column. A call will also be automatically removed from the system if its total time in the system exceeds 24 hours. The Total Time column lists the call's duration in the system.

You can manually redirect a call in the Queued media grid using the following methods:

- Drag and drop a call between queues
- Use the right-click menu to move a call between queues
- Use the right-click menu to send a call to a specific dialable number

You may notice that the first two methods perform the same action. However, the second method is convenient when queue monitor is maximized and you want to move a call without having to resize one or more monitors.

NOTE: If you right-click and redirect a call to a device other than a queue, the call will no longer be considered an ACD call for reporting purposes. If you redirect a call using either of the other two methods, the call remains an ACD call.

When you manually redirect (drag and drop) a call in Interactive Visual Queue, MiContact Center Business changes the way the call is pegged on the Queue Performance reports. If you redirect a call before the short abandon time set for the queue, the call is pegged as *Unavailable*. If you redirect a call after the short abandon time set for the queue, the call is pegged as *Interflowed*. An internal ACD call is pegged as *Abandoned* if the call is redirected at any time.

Redirecting calls between queues

To redirect a call from one queue to another queue using a drag-and-drop operation

1) In the Queued media grid, click anywhere in the row of the call you want to move.
2) Use a drag-and-drop operation to move the call from its original queue monitor to a new queue monitor.

To redirect a call from one queue to another queue using the menu

1) In the Queued media grid, right-click the row of the call you want to redirect and click **Send to**.

   A list of available queues appears.

   NOTE: You can select multiple rows to move multiple calls to a new queue.

2) Click the name of the queue to which you want to move the call.

Redirecting voice interactions to specific agents

You can transfer voice interactions in queue directly to agents who are available or in Make Busy/Overloaded states. Agents in Do Not Disturb cannot receive transferred interactions and will not appear in the list of available agents.

To redirect voice interactions to agents

1) In the Queued media grid, right-click the row of the interaction you want to redirect and click **Send to > Agent**.

   A list of available agents who can handle the voice interaction displays.

   NOTE: You can use the search button to locate a specific agent, either by name or reporting number.

2) Click the name of the agent to which you want to send the interaction.

3) Click **OK**.

Redirecting calls to specific numbers

Using the Send to menu option, you can redirect calls in Interactive Visual Queue to any dialable number, including your own phone.

To redirect a call to a dialable number

1) In the Queued media grid, right-click the row of the call you want to redirect and click **Send to > [Extension]**.

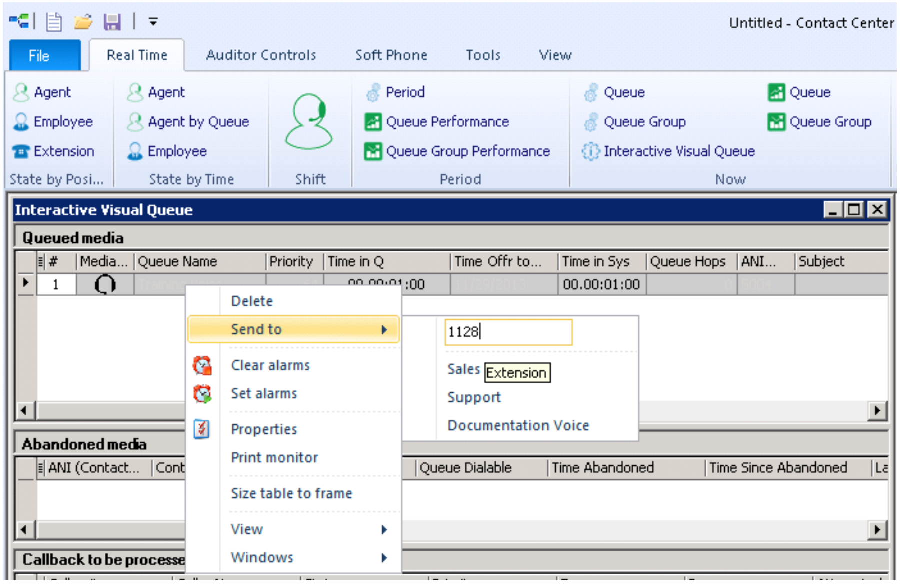
   When you click [Extension], it changes to a text box.

2) Type a number in the text box and press **Enter**.

   See the following figure.

   NOTE: You cannot use the Extension option if you have multiple calls selected. Only one call can be sent to a dialable number at a time.

Figure 78: Redirecting a call to an extension



To redirect a call to your phone

1) In the Queued media grid, right-click the row of the call you want to redirect.

2) Click **Send to > Me**

   NOTE: This option is only available when you have Contact Center Softphone installed and configured on your computer.

Removing calls

To remove a call from Interactive Visual Queue

1) Right-click the row of the call you want to remove.

2) Click **Delete**.

   The call is removed from Interactive Visual Queue.

NOTE: Deleting a call from an Interactive Visual Queue monitor will not remove it from the actual queue. This will just cause Interactive Visual Queue to stop tracking the call.

Calling back abandoned callers

The Abandoned media grid displays abandoned call information and enables agents to call back abandoned callers.

NOTE:

- Abandoned call information is automatically deleted from the Abandoned media grid after 24 hours.
- Abandoned calls cannot be transferred to agents.

To call back an abandoned caller

1) Right-click the row of the abandoned call you want to call back, and select **Call** to automatically dial the abandoned caller.

   NOTE: Each time an agent attempts to call back an abandoned caller, their name and ID are attached to the call record and display in the Last callback employee column of the Abandoned media grid.

2) After you have contacted the abandoned caller, right-click the row associated with that call, and select **Delete** to remove the abandoned call record from the Abandoned media grid.

Configuring alarms

You set alarms on Interactive Visual Queue monitors similar to the way you set alarms on Contact Center Client monitors. The main difference is that some of the variables you can monitor, Caller Number, Caller Name, DNIS Number, DNIS Name, Collected Digits, and Collected Information, use a string for their value as opposed to a threshold boundary. For example, you can set an alarm that is triggered when a specific name appears in the Caller Name column.

The value you type for Caller Number or Caller Name alarms is a wildcard, which means the alarm will trigger if that value appears in any form. For example, if you configure a Caller Name alarm for the value *John*, the alarm will trigger for the values *John Smith*, *Johnathan*, *longjohn*, and so on.

To configure alarms:

1) Right-click an Interactive Visual Queue monitor and click **Set alarms**.

   The Set Alarms window appears.

2) Under **Performance variables**, select the variable you want to monitor.

   NOTE: You cannot set Alarm Thresholds for "Callback to be Processed" within the Interactive Visual Queue, but you can set them for "Queued Media" and "Abandoned Media".

3) Under **Alarm thresholds**, click Add value and select a boundary (or value) for the variable you selected as well as the alarm type(s) that will indicate when the variable exceeds those boundaries.

4) If you want to add further alarms for the variable, repeat step 3.

5) Click **OK** to save the alarms.

For more information on configuring monitor alarms, see *"Setting alarms"*.

Understanding call priority

Each queue has a default priority level. When a call enters the system for the first time, the call adopts the default priority of whichever queue it enters. If all calls in a queue have the same priority, the position of the calls are based on each call’s total time in the current queue. If a queue contains calls that have multiple priority levels, higher priority calls will have a higher position in the queue than lower priority calls.

As long as a call remains in a queue, it maintains its priority. However, if a call moves from one queue to another queue, the call’s priority may change, based on the method used to move the call.

When you redirect a call manually, the call always adopts the default priority level of the destination queue. For example, suppose Queue 1 has a priority of 1 and Queue 2 has a priority of 15. When a call first enters Queue 1, it has a priority of 1. However, if you manually move that call to Queue 2, using either a drag-and-drop operation or the right-click menu, the call priority lowers to 15. The rules work the same in reverse. If you manually move a priority 15 call from Queue 2 to Queue 1, the call priority increases to 1 when it enters Queue 1.

Calls interflowed automatically retain the original call priority, or adopt the priority of the new queue based on telephone system settings.

Viewing callback information in Interactive Visual Queue

When licensed for IVR, Interactive Visual Queue also provides the Callback to be processed grid, which displays all callbacks in the displayed queues in the Interactive Visual Queue monitor. Users can access the Callback to be processed grid to manage callbacks in queue. For more information, see *"Managing callbacks in Interactive Visual Queue callback monitors"*.

The following list provides descriptions of the column headings available in the Callback to be processed grid:

- *Caller #* displays the phone number provided by the contact
- *Caller Name* displays the contact's name
- *Status* displays the state of the callback
  - New request
  - In progress
  - Requeued
  - Completed
  - Unknown
- *Priority* the importance level of the callback.
  - Voice—Normal
  - Web—Normal
  - Abandoned—Low
- *Type* displays the type of callback
  - Voice
  - Web
  - Abandoned
- *Reason* displays the callback's reason for its current status
- *Attempted Calls to Agent* displays the number of times the agent attempted the callback
- *Last Time Agent Attempted* displays the last time the agent attempted the callback
- *Request time* displays the specific time at which the callback is scheduled to be processed; this field is populated when the callback is requeued
- *Time Received* displays the specific time the caller submitted the callback request
- *Web IP Address* displays the IP address of the contact who submitted the callback request.
- *Last Attempted Call To Client* displays the specific time the last callback attempt to the caller was made
- *Attempted Calls To Client* displays the number of times the callback was attempted

- *Client Available From* displays the earliest time the contact is available to receive the callback
- *Client Available To* displays the latest time the caller is available to receive the callback
- *ANI* displays the phone number of the caller
- *DNIS* displays the phone number the caller dialed
- *Dialable* displays the number of the device that will handle the callback
- *Device Name* displays the name of the device that will handle the callback
- *Device Type* displays the type of device that will handle the callback – extension,agent, or queue
- *Recorded Message* displays a hyperlink to the voice callback request .wav file left by the caller
- *Area* displays the state, province, or other area the call originated from
- *Country* displays the country the call originated from
- *Endpoint* displays the endpoint attempting to perform the callback
- *Region* displays the region the call originated from

Managing callbacks in Interactive Visual Queue callback monitors

Using Interactive Visual Queue's Callback to be processed grid, users can requeue, reject, and delete callbacks from monitors. Requeued callbacks are re-entered into their queue. Rejected callbacks are removed from the queue and will not be offered to employees. Deleted callbacks are removed from the current monitor, but are not removed from the system.

Users can also adjust a callback's priority. Callback priority determines the order of which callbacks will be offered to agents. Callbacks are offered to agents in order of their priority and then by the longest waiting callback of that priority. For example, High priority callbacks are offered before Normal priority callbacks, even if the Normal priority callbacks have been in queue longer.

The following procedures explain how to:

- Requeue a callback
- Reject a callback
- Delete a callback
- Change a callback's priority

To requeue a callback

1) Right-click a callback and select **Requeue**.
2) Select **Yes**.

To reject a callback

1) Right-click a callback and select **Reject**.
2) Select **Yes**.

To delete a callback

1) Right-click a callback and select **Delete**.
2) Select **Yes**.

To change a callback's priority

- Right-click a callback and select **Change priority > [priority level]**.

Using Contact Center PhoneSet Manager and Contact Center Softphone

Contact Center PhoneSet Manager and Contact Center Softphone enable agents to use their desktop computers as IP-based phones. Contact Center PhoneSet Manager automates Mitel IP phone sets from the computer desktop. An agent who uses Contact Center PhoneSet Manager has a headset connected to a desk phone. Contact Center Softphone provides complete phone set functionality from the computer desktop. A computer and wired or wireless USB headset deliver calls to the agent.

Starting Contact Center Client

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

You use Contact Center Client to access real-time monitors and functionality. Supervisors can view real-time voice, email, chat, SMS, and open media statistics. After starting Contact Center Client, supervisors can choose to minimize it to either the system tray or the taskbar.

To start Contact Center Client

1) Open **Contact Center Client**.
2) If prompted, type your **Username** and **Password** and verify the Enterprise Server IP address.
3) If you use Secure Socket Layer, select **SSL**.
4) Optionally, select **Remember my credentials**.
5) Click **Login**.

Setting up the soft phone

The functionality of Contact Center PhoneSet Manager and Contact Center Softphone is similar. For simplicity, we will use soft phone when referring to features and functionality common to both applications.

NOTE: Before you set up the soft phone on your client computer, ensure your network administrator has configured your soft phone as a 5020 IP phone on the telephone system.

To set up a client computer to use the soft phone

1) Consult your network administrator to confirm your soft phone extension number.
2) Ensure your headset is connected.
3) Configure sound and audio device properties.

   See "Configuring sound and audio device properties".

NOTE: Contact Center Client's PhoneSet Manager function is not supported for use in conjunction with MiCollab SIP Softphone.

Configuring sound and audio device properties

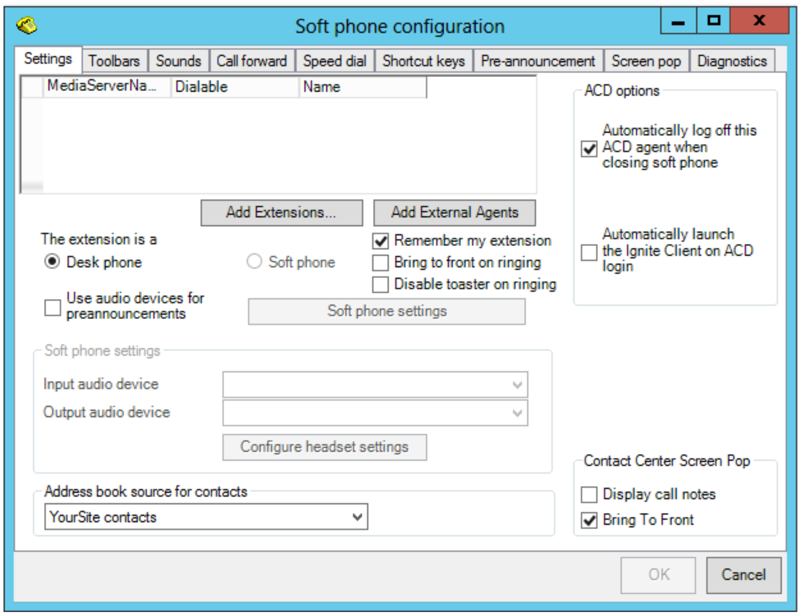
To configure sound and audio device properties for Windows operating systems, you must set the PC speakers as the default audio device and adjust the volume of the PC speakers, headset speakers, and headset microphone.

Opening the soft phone

To open the soft phone

1) In the **Contact Center Client** ribbon, click **Soft Phone**
2) Click the **Soft Phone** icon in the toolbar ribbon.
   The Soft phone configuration window opens.
   See the following figure.

Figure 79: Soft phone configuration window



3) Click **Add Extensions** to search and select from all internal standard extensions, hot desk extensions, and external hot desk user extensions.
4) Click **Add External Agents** to search and select from all external hot desk agent extensions.
5) Select your phone extension from the list of extensions.
6) If you have Contact Center PhoneSet Manager, click **Desk phone**. If you have Contact Center Softphone, click **Soft phone**.
7) If you want toTo log on automatically to the soft phone with your phone extension the next time you open the current profile, select the **Remember my extension** check box.
   You must save the current profile before you quit the soft phone for this option to work.
   If you are a hot desk user who participates in the use of PINs, the PIN login dialog box opens. If you are a hot desk user who does not participate in the use of PINs, go to step 10.

NOTE: When logging in as an External Hot Desking Agent or a hot desking user who is not set up to use a PIN login, if the PIN entry window displays, do not enter a PIN just click **Login**.

8) Type your **Login PIN**.

   If you want Contact Center Client to remember your Login PIN, select the Remember your credentials check box. This option is not available if your Contact Center Client profile is shared. Depending on their security role settings, employees may not be prompted to enter a PIN.

9) Click **Login**.

   NOTE: If the Login PIN you entered is invalid the login will fail and you will be asked to enter a valid Login PIN. If you exceed the configured number of failed login attempts, your PIN will lock and you will need to contact your System Administrator to reset your PIN.

10) If you want Contact Center Client to be the top-most window on ringing, select the **Bring to front on ringing** check box.

11) If you do not want the screen pop windows to display in Contact Center Client when calls are ringing on the desktop, select the **Disable toaster on ringing** check box.

12) If you selected Soft phone in step 6, under **Soft phone settings**, configure soft phone options.

    NOTE: For the relevant configuration information, contact your supervisor or system administrator.

13) After **Address book source for contacts**, select **YourSite contacts**.

    Contact Center PhoneSet Manager and Contact Center Softphone users can access YourSite database phone extensions or Global Address List phone numbers when they handle calls.

14) To automatically log off the agent from the telephone system when closing the soft phone, select the **Automatically log off this ACD agent when closing the soft phone** check box.

15) To automatically launch Ignite (DESKTOP) when logging into Contact Center Softphone or PhoneSet Manager, select the **Automatically launch the Ignite Client on ACD login** check box.

    NOTE: This option only applies to voice agents who use Ignite (DESKTOP) to handle multimedia interactions.

16) To synchronize online presence indicators with ACD agent states in real-time monitors, select the **Synchronize my Lync presence with myACD phone state** check box.

    When this option is selected an agent's state changes in sync with Skype for Business presence.

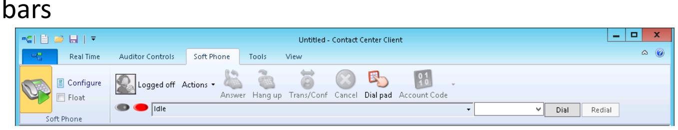
17) To display call notes in the soft phone and on the Call Notes monitor, select the **Display call notes** check box.

18) Click **OK**.

    The Contact Center Client window displays the Soft Phone, Phone and Functions toolbars.

    See the following figure.

Figure 80: Soft phone toolbars



19) If you want to be able to position the soft phone toolbar elsewhere on your desktop, enable the **Float** check box.

20) To move the soft phone toolbar, hover the mouse over the perforated line on the left-side of the toolbar until the four-headed arrow displays. Then click, drag, and drop it to the desired position

on your desktop. To re-anchor the toolbar to the ribbon, drag and drop it into position under the ribbon.

21) If you want to modify the soft phone configuration, click the **Configuration** icon in the toolbar to reopen the Soft phone configuration window.

Changing soft phone IP addresses

If you are required to change the IP address for your soft phone, consult the following procedure:

1) In the **Contact Center Client ribbon**, click **Soft Phone**.
2) Click the **Soft Phone** icon in the toolbar ribbon.
3) In the **Soft phone configuration** window, click **Soft phone settings**.
4) After **Use IP address:** select the new IP address from the drop-down list and click **OK**.

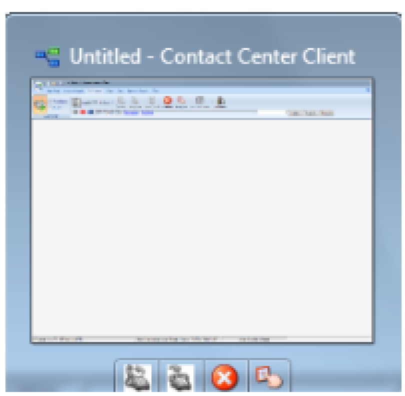
   NOTE: For information on what address to select, contact your supervisor or system administrator.
5) In the Soft Phone configuration window, under **'This extension is a'**, click **Desk phone** and then click **Soft phone**.

   NOTE: Clicking 'Desk phone' is required to unbind your soft phone from the previous IP address.
6) Click **OK**.
7) On the ribbon, click **Save**.

Thumbnail soft phone toolbar

The thumbnail soft phone toolbar enables agents to quickly perform soft phone actions when other applications are open on the desktop. The thumbnail toolbar gives agents access to Answer, Hang up, Cancel, and Dial functions and is particularly helpful when the Contact Center Client application is minimized and you want to perform a quick soft phone action. To see the toolbar options, hover over it with your mouse. (See the following figure.)

Figure 81: Thumbnail soft phone toolbar



NOTE:

- To enable the thumbnail soft phone toolbar, your Windows operating system must support Windows AERO functionality.
- Because of Windows limitations, this toolbar may not always display when Contact Center Client has focus on the desktop.

Logging on to the ACD

Agents can log on to the ACD in a number of ways, such as selecting the Superkey button in Contact Center Softphone, or using the agent control function in Interactive Contact Center.

We recommend that soft phone users who are hot desking agents log on to the ACD using the soft phone Actions menu. This enables the soft phone to identify agents.

NOTE: If you are an External Hot Desking Agent or a hot desking user who logged in internally, logged out, and then chose to log back in externally, you will not be able to log on with the soft phone Actions menu. In order to access this functionality, you must first close and reopen the soft phone toolbar.

To log a standard agent onto ACD

- On the soft phone Functions toolbar, click **Actions > Log on > Agents** and select an agent ID.

To log an external hot desking user onto ACD

- On the soft phone Functions toolbar, click **Actions > Log on > Hot Desking Users**.

To log an External Hot Desking Agent on to ACD

- On the soft phone Functions toolbar, click **Actions > Log on > Agent ID**.

NOTE: When a hot desk agent logs in to the ACD a user license is taken from the available licensing pool and when the agent logs out the license is released back to the licensing pool. Agents are notified upon login attempt if the number of concurrent logins exceeds the number of available user licenses. If there are no available user licenses the login attempt will fail.

Phone and Functions toolbars

The Phone toolbar displays your

- Extensions (gray oval buttons)
- Hold button (red oval button)
- Superkey button (blue oval button, for Contact Center Softphone only)
- Current phone state (Idle, Dialing, Talking)box with a down arrow that displays a call details window
- Dial box (field for dialing extensions or phone numbers)
- Dial button (Contact Center PhoneSet Manager only)
- Redial button (Contact Center Softphone only)
- Cancel button (Contact Center Softphone only)
- Message button (for retrieving voice mail messages, Contact Center Softphone only)

The Functions toolbar displays

- Your current ACD state (Logged On/Off, in Make Busy, in Do Not Disturb)
- The ACD actions currently available
- Telephony buttons

Phone functions

You can readily answer calls or forward them to extensions or phone numbers using the soft phone. You can select people from contact and speed dial lists, and perform the following actions: Redial (Contact

Center Soft phone only), Transfer, Conference, Mute, Forward, Request help, Hold, Retrieve, Split, Swap, Camp on, Leave a message, Retrieve a message, Call me back, Hang up, and Cancel.

NOTE: External hot desk agents access the 'Answer' and 'Hang up' functions using their external device and not the soft phone toolbar.

The following table lists the soft phone telephony options and their corresponding meanings.

Table 36: Agent Extension actions (Sheet 1 of 2)

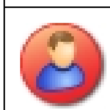
Icon		Meaning
	Account Code	tags a call with an Account Code
	Answer	answers a ringing call
	Auto answer	if enabled, answers a ringing call without you having to click Answer
	Call me back	notifies you as soon as the extension number you are trying to call is available
	Camp on	notifies an employee you are attempting to call with a series of audible beeps
	Cancel	terminates your connection to a caller
	Conference	connects three or more people together for an interaction
	Dial pad	enables you to dial a number using a keypad
	Forward	forwards a call to a phone number or extension
	Hang up	terminates a call
	Hold	places the current call on hold

Table 36: Agent Extension actions (Continued) (Sheet 2 of 2)

Icon		Meaning
	Leave a message	leaves a message waiting notification on an employee’s extension
	Mute	if you have Contact Center Softphone, disables your microphone so you can consult privately with another employee while on a call
	Request help	calls an employee who can click Answer and listen to an in-progress call without the caller knowing
	Retrieve	picks up a call that is held or camped on to your extension
	Speed dial	enables you to make a call to a specified number with one mouse click
	Split	disconnects one person from a conference call
	Swap	swaps between the current and the held party
	Transfer	forwards an in-progress call to another answer point
	Transfer/Conference	places a caller on hold and makes a consultation call
	Volume	if you have Contact Center Softphone, adjusts the volume of your speakers and/or microphone
	Call Notes	enables you to view the notes associated with the current call and add notes. Call notes are supported for inbound calls only.

Customizing the soft phone

The following section describes how you can further customize your soft phone.

Selecting audio devices

To select audio devices

1) Click **Configure** next to the phone icon in the Soft Phone ribbon.
2) After **Input audio device**, select an audio device for your microphone.
3) After **Output audio device**, select an audio device for your speakers or headset.

   NOTE: You can configure the soft phone to use the "Default Communication Device" by selecting the option. When idle or during a call or while on hold, you can switch the audio device and the configured "Default Communication Device" temporarily changes to an available device, which is usually the "Default Audio Device". After you switch back to the your audio device, it switches the "Default Communication Device" back to the configured device.
4) Click **OK**.

Specifying the address book source for contacts

To specify the address book the soft phone uses for contacts (the YourSite database.)

1) Right-click the Phone toolbar and click **Configure**.
2) After **Address book source for contacts**, select **YourSite contacts**.
3) Click **OK**.

Resizing toolbar buttons

To resize toolbar buttons

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Toolbars** tab.
3) After **Functions toolbar**, select a size for displaying the Functions toolbar buttons.
4) After **Phone toolbar**, select a size for displaying the Phone toolbar buttons.
5) Click **OK**.

Displaying, hiding, and retiring toolbar buttons

You can display telephony buttons, hide them so they appear on the Functions toolbar only when required, and retire them for actions you rarely perform, such as Camp on and Request help.

To display telephony buttons

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Toolbars** tab.
3) Under **Selected buttons**, select the check boxes of the telephony buttons you want to display.
4) Click **OK**.

To hide telephony buttons

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Toolbars** tab.
3) Under **Selected buttons**, clear the check boxes of the telephony buttons you want to hide from view.
4) Click **OK**.

To retire telephony buttons

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Toolbars** tab.
3) Under **Selected buttons**, select the telephony buttons you want to retire and click the left arrow to add these buttons to the Available buttons list.
4) Click **OK**.

To restore telephony buttons

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Toolbars** tab.
3) Under **Available buttons**, select the telephony buttons you want to restore and click the right arrow to add these buttons to the Selected buttons list.
4) Click **OK**.

Repositioning toolbar buttons

To specify the order in which telephony buttons appear

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Toolbars** tab.
3) Under **Selected buttons**, select a telephony button.
4) Click the up or down arrow to change the position of the button relative to other buttons on the Functions toolbar.
5) Click **OK**.

Configuring sounds and notifications

You can configure sounds for individual phone events for incoming calls, secondary incoming calls, and/or the digits dialed on your primary extension, or on all extensions. A primary incoming call is a call you receive while you are in the idle active state and are available to take the call. A secondary incoming call is a call you receive while you are on a call on another extension and are not available to take the call.

Every time you receive a call a pop-up window notifies you the call has arrived. You can disable the pop-up notification.

To configure a sound for a phone event

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Sounds** tab.

3) Select the **Incoming calls**, **Secondary incoming calls**, and/or **Play sounds when dialing digits** check boxes.
4) After **Phone events**, select a phone event.
5) After **Sound file name**, click **Browse** and select a sound file.
6) If you want to play the sound file when the phone event occurs on any of your extensions, click Apply to all lines.
7) Click **OK**.

To disable the call arrival pop-up notification

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Sounds** tab.
3) Under **Phone events**, click a phone line.
4) Clear the **Display pop-up notification for incoming calls** check box.
5) Click **OK**.

Enabling and disabling Contact Center Screen Pop

Depending on administrative settings, Contact Center Screen Pop can launch applications or webpages when calls are received and enable agents to automatically receive caller and account information via pop-ups on their desktops for incoming calls.

When you enable or disable Contact Center Screen Pop, the settings you select determine Contact Center Screen Pop accessibility on a per-agent profile basis.

To enable or disable Contact Center Screen Pop

1) Click **Soft Phone > Configure**.
   The Soft phone configuration window opens.
2) Click the **Screen pop** tab.
3) To enable Contact Center Screen Pop, select the **Display Contact Center Screen Pop** check box.
4) To disable Contact Center Screen Pop, clear the **Display Contact Center Screen Pop** check box.
5) Click **OK**.

Making calls ring through your computer speakers

You can make calls ring through your computer speakers instead of your headset.

To make calls ring through your computer speakers

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Sounds** tab.
3) After **Play the rings sounds on** select the sound output device for your computer speakers.

Adjusting the volume of your speakers and microphone

If you have Contact Center Softphone, you can adjust the volume of your speakers and microphone.

To adjust the volume of your speakers

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Sounds** tab.
3) Adjust the volume by moving the speaker slider.

To adjust the volume of your microphone

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Sounds** tab.
3) Adjust the volume by moving the microphone slider.

Configuring call forward destinations

You can forward calls manually to pre-configured call forward destinations. In addition, you can configure and enable call forwarding so the telephone system forwards calls to other answer points when you are temporarily unavailable or away from the office. For example, you could specify all External call busy calls (external calls to your extension when you are unavailable) you receive be forwarded to a co-worker's extension. Rather than directing these calls to voice mail, the telephone system would forward these calls to your co-worker.

NOTE: MiContact Center Business and MiVoice Analytics Version 9.0 do not support Call Forward Always *from* Ring Groups. Call Forward Always *to* Ring Groups is supported.

To configure call forward destinations for calls you will forward manually

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Call forward** tab.
3) Under **Name**, type the name of the person to whom you will forward calls.
4) Under **Number**, type an extension or phone number (preceded by a number you dial to access an outside line).
5) Click **OK**.

To configure and enable call forward destinations for calls the telephone system will forward

NOTE: MiContact Center Business and MiVoice Analytics Version 9.0 do not support Call Forward Always *from* Ring Groups. Call Forward Always *to* Ring Groups is supported.

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Call forward** tab.
3) Specify the source for call forwarding.
4) Specify destinations for the following call types:
   - All calls (all calls you receive)
   - External call busy (external calls to your extension when you are unavailableon an extension inbound or extension outbound call)
   - External call no answer (external calls to your extension that you do not answer)
   - Internal call busy (internal calls to your extension when you are unavailableon an extension inbound or extension outbound call)
   - Internal call no answer (internal calls to your extension that you do not answer)

5) To activate the call forwarding rules immediately, select the **Enabled** check boxes of the call forwarding types to be activated.
6) Click **OK**.

Configuring speed dial numbers

When you pre-configure speed dial numbers in Contact Center Softphone, these contacts are available in drop-down lists adjacent to the Speed dial, Trans/Conf, and Request help buttons on the Functions toolbar.

You can display a button for each speed dial number or display one button with a down arrow that lists all of the speed dial numbers you have configured. You can speed dial calls manually to pre-configured extensions and phone numbers.

To configure a speed dial number

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Speed dial** tab.
3) Under **Name**, type the name of the person to whom you will speed dial calls.
4) Under **Number**, type an extension or phone number (preceded by a number you dial to access an outside line).
5) Click **OK**.

Configuring shortcut keys

You can assign a shortcut key to a telephony function to perform it with a simple keystroke. This enables you to perform telephony functions while the soft phone is minimized or another application is currently selected.

To configure a shortcut key for a telephony function

1) Right-click the Phone toolbar and click **Configure**.
2) Click the **Shortcut keys** tab.
3) Under **Shortcut key**, select a telephony function.
4) Click the down arrow, select **Ctrl**, **Alt**, **Shift**, or **Win**, and select a keyboard number, letter, or function from the list.
5) Click **OK**.

Configuring pre-announcement messages

Agents who have Contact Center PhoneSet Manager or Contact Center Softphone can record introductions that are played to callers (for example, 'Hi. This is Paul Jones in Customer Support. Could you please tell me your customer site key?') The introduction that is played is based on the queue the call arrives on and the time of day it is received. The recorded introduction provides customers with a consistent greeting and gives the agent extra time to retrieve customer information. You can stop pre-announcement messages at any time.

You can configure more than one pre-announcement rule. For each rule, you specify the conditions in which the soft phone will play a particular pre-announcement message. If one or more conditions is satisfied for a particular rule, the soft phone will play the associated pre-announcement message. You can order the rules on the Pre-announcement rules table to establish their priority. Pre-announcement rules are evaluated in the order shown in the table. If one pre-announcement rule is satisfied, the associated sound file is played and no other rules are evaluated.

To use pre-announcement messages with Contact Center PhoneSet Manager, you must have a Mitel ACD desk phone (for example, 5212) and a PCTI adaptor. The PCTI adaptor enables the audio being played from the agent PC and the audio from the agent desk phone to be mixed.

To connect a PCTI adapter to your computer for use with Contact Center PhoneSet Manager

1) Set the PCTI switch to **Both**.
2) Set the PCTI switch to **HeadSet**.
3) Plug the Mic/Audio cable of the headset into the appropriate Mic/Audio inputs on the PCTI adapter.
4) Unplug the handset from the deskphone and plug it into the handset plug on the PCTI adapter.
5) Plug the telephone input cable of the PCTI adapter into the telephone base.
6) Plug the computer input of the PCTI adapter into the appropriate Mic/Speaker inputs on the PC.

   NOTE: Ensure the headset is turned on, on the deskphone base.

To configure a pre-announcement rule for Contact Center PhoneSet Manager

1) Right-click the Phone toolbar and click **Configure**.
2) Under **This extension is a**, select **Desk phone**.
3) To use audio devices for pre-announcements, select **Use audio devices for pre-announcements** and specify the input and output audio device.
4) Click the **Pre-announcement** tab.
5) Click **Add rule**.

   The Add / Edit pre-announcement rule window opens.
6) Select the conditions that determine when the pre-announcement message will play.
7) Specify parameters for each condition.
8) Select or record a wave file to play when the above conditions are met.
9) Type a name for the pre-announcement rule.
10) If you want to hear ringing on your desk phone, select **Enable ringing sound in desk phone**.
11) Click **OK**.

To configure a pre-announcement rule for Contact Center Softphone

1) Right-click the Phone toolbar and click **Configure**.
2) Under **This extension is a**, select **Soft phone**.
3) Click the **Pre-announcement** tab.
4) Click **Add rule**.

   The Add / Edit pre-announcement rule window opens.
5) Select the conditions that determine when the pre-announcement message will play.
6) Specify parameters for each condition.
7) Select or record a wave file to play when the above conditions are met.

8) Type a name for the pre-announcement rule.
9) Click **OK**.

To re-order pre-announcement rules

1) Select a rule.
2) Click the up or down arrow to change the priority of the rule.
3) Click **OK**.

NOTE: You can alternately configure whisper announcements using agent workflows in IVR. See the *MiContact Center Business Installation and Administration Guide* for more information.

Making and terminating calls using Contact Center PhoneSet Manager

When you make calls, on the Functions toolbar you can readily select contacts you pre-configure in CCMWeb, or speed dial numbers you configure in Contact Center PhoneSet Manager. See *"Configuring speed dial numbers"* and *"Displaying, hiding, and retiring toolbar buttons"*.

You can dial any extension number or phone number. Contact Center PhoneSet Manager typically uses your primary extension to make calls. You can optionally select a different extension on the Phone toolbar to make calls.

Making calls

To dial by phone number or extension number using Contact Center PhoneSet Manager

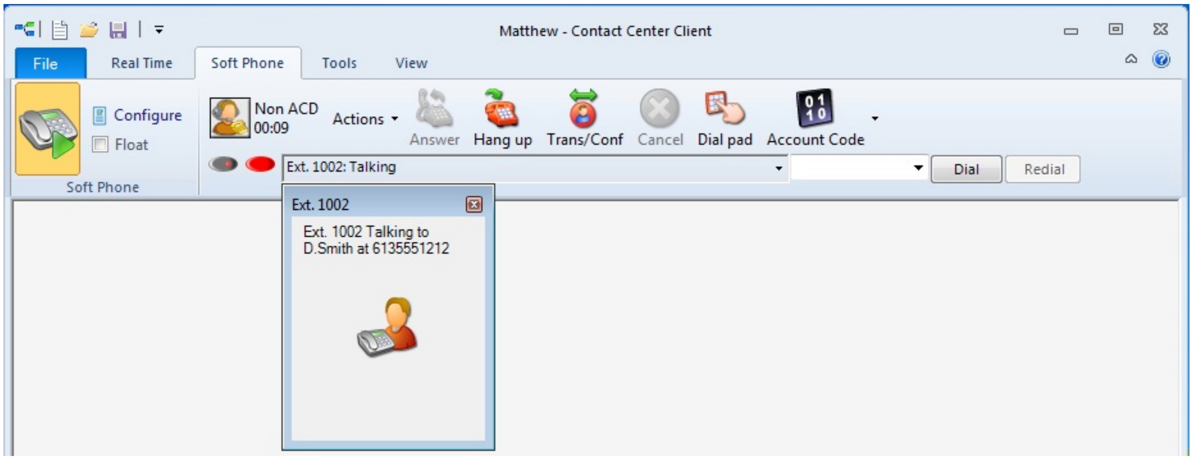
1) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the dial box and type a number or extension on the dial pad.
2) Click **Dial**.
3) If you want To view the call details window, click the down arrow adjacent to the box that displays your current phone state.

   See the following figure.

To dial internally from a real-time monitor using Contact Center PhoneSet Manager

- From any real-time monitor, right-click an agent, employee, or extension cell and click **Call**.

Figure 82: Making a call



Making calls to your contacts

To make a call to an extension in your contact list

1) Click the arrow adjacent to the dial box and click the **Contacts** tab.
2) Select a contact in the list.
3) Click **Dial**.

Making calls using speed dial

To dial using speed dial

- Click **Speed dial** and select a name in the list.

Terminating calls

To terminate a call

- Click **Hang up**.

Forwarding and answering calls using Contact Center PhoneSet Manager

You can forward calls manually to pre-configured call forward destinations without having to speak to the caller first. In addition, you can configure and enable call forwarding so the telephone system forwards calls to other answer points when you are temporarily unavailable or away from the office. See *"Configuring call forward destinations"*.

If a call is ringing on your extension and you click the Forward button, the call will be forwarded to the default call forward destination configured in the telephone system. If you click the down arrow adjacent to the Forward button, you can select an extension or phone number for call forwarding.

Forwarding calls

When a call is ringing on your extension, to forward the call using Contact Center PhoneSet Manager

1) Click **Forward**.
2) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Forward button and select a contact.
3) Click **Dial**.

Answering calls

When an agent receives a call with Contact Center Softphone, detailed caller information is displayed on the desktop. (See the following figure.)Agents can choose to answer the call or forward it to another agent. Additionally, the display can provide access to call notes, which are notes an agent adds to the call before transferring it. See *"Adding call notes to a call"*.

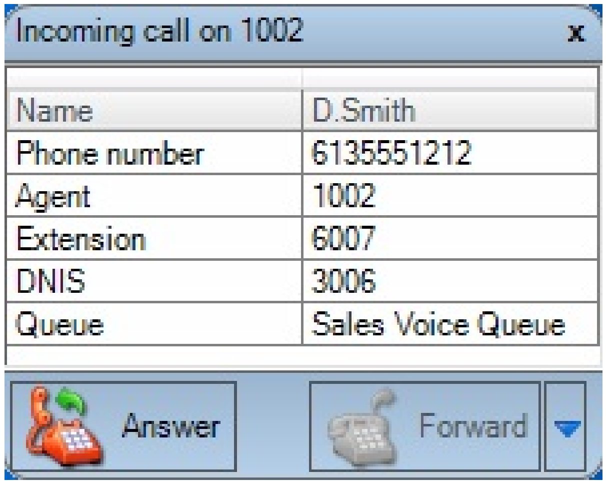
If configured and available the following information is provided in the soft phone display

- **Caller name**—name of the caller
- **ANI**—telephone number of the caller
- **DNIS**—telephone number the caller dials
- **DNIS name**—the name associated to the DNIS number in YourSite database
- **Agent ID**—agent who transferred the call
- **Extension**—extension from which the call was transferred
- **Queue**—queue from which the call originated
- **Collect Caller Entered Digits**—digits the caller enters for identification purposes, such as a customer site key
- **Customer Collected Information**—information collected from a third party OBDC database
- **Call notes**—notes added by an agent

  NOTE: Call notes are supported for inbound calls only.

You can answer calls by right-clicking the Contact Center Softphone system tray icon and selecting Answer, or by clicking the Answer toolbar button.

Figure 83: Contact Center Softphone display



To answer a call using Contact Center Softphone

- Click **Answer**.

Handling calls using Contact Center PhoneSet Manager

You can handle calls by right-clicking the Contact Center PhoneSet Manager system tray icon and selecting telephony functions, or by selecting telephony buttons on the Functions toolbar. The telephony buttons available depend on the action you last performed. You can configure the toolbar buttons so they are always visible, or visible only when required. See *"Displaying, hiding, and retiring toolbar buttons"*.

When you pre-configure speed dial numbers in Contact Center PhoneSet Manager, these contacts are available in drop-down lists adjacent to the Speed dial, Trans/Conf, and Request help buttons on the Functions toolbar. See *"Configuring speed dial numbers"*.

Placing calls on hold

To place a call on hold

- Click **Hold** (red oval button).

Retrieving calls

You can retrieve a held call, or retrieve a call when a call is camped on to your extension.

When an agent is on a call and another caller camps on to their extension, the Retrieve button is enabled. When the agent presses the Retrieve button, they can talk to the held party. From that point on, the agent uses the Swap button to switch back and forth between the two callers (current and held parties).

To retrieve a call

- Click **Retrieve**.

Adding call notes to a call

When employees are speaking with customers, they can add notes to calls to share with other employees involved in the call. This ensures all employees have context on calls and know what information has been provided to customers upon call transfer.

When a call is being transferred to an employee, the soft phone display shows the most recent note associated with the call. When the employee answers the call, Contact Center Client appears on top of all other open applications and displays the Call Notes monitor. The monitor includes all of the call notes associated with the current call.

Employees can add notes each time a call is transferred, and employees on conference calls can add notes simultaneously. Each set of notes includes the employee's name and a date/time stamp. When an employee completes a call and answers a new call or closes the Call Notes monitor, all call note information is saved and included in the Lifecycle reports. Call notes are not preserved when a call is parked.

NOTE:

- Call notes are supported for inbound calls only.
- On the Soft phone configuration window, you can clear the Enable call notes check box to hide the Call Notes monitor and prevent call notes from being displayed. Optionally, you can enable the Bring to front check box to ensure call notes display on top of all other windows when calls are received.
- You must have Contact Center PhoneSet Manager or Contact Center Softphone open in order to view or add call notes.
- Time stamps are based on the 3300 ICP telephone system clock.

To add a call note

1) As a call is ringing on your extension, on the soft phone display click **Answer** to answer the call.
   Contact Center Client appears on top of all open applications and displays the Call Notes monitor.
2) After **Enter a new call note**, type a note.
   Call notes can include a maximum of 100 characters.
3) Click **Add**.
   The call note is added to the Call notes text box and is included in the soft phone display upon call transfer.

Transferring calls

You can perform a blind transfer or a supervised transfer.

To perform a blind transfer

1) While on a call, click **Trans/Conf**.
2) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line if required). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.
3) Click **Hang up**.

To perform a supervised transfer

1) While on a call, click **Trans/Conf**.
2) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.

   The system places the caller on Hold.
3) Wait for the called party to answer. If you receive a busy signal or a voice mail greeting, click **Cancel** to return to the initial party. Otherwise, speak to the agent and identify the caller.
4) Click **Transfer** to transfer the call.

Conferencing calls

You can include up to eight people in a conference call. The following example illustrates a three-way conference call.

To set up a conference call

1) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line).
2) Click **Dial**.
3) After you speak with the person who answers, click **Trans/Conf** to add a person to an in-progress call.

   The system places the person on hold.
4) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.
5) Click **Dial**.
6) Speak to the person who answers.
7) Click **Conference** to initiate a three-way conference call.

To split a conference call

1) Click **Split**.

   The last person you added to the conference call is placed on hold, and you can speak privately with the first person.

Consulting with people while on calls

To consult with a person while on a call

1) Click **Trans/Conf** to conference in the person.

   The system places the initial party on Hold.
2) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.
3) Click **Dial**.

4) After you consult with the person, either click **Conference** to conference in the person, click **Cancel** to hang up on the person, click **Transfer** to transfer the call to the person, or click **Swap** to talk to the initial party.

Requesting help while on calls

To request help while on a call

1) Click **Request help**.
2) On the dial pad, type the extension number of the employee you want to call. Otherwise, click the down arrow adjacent to the Request help button and select a contact.
3) Click **Dial**.

   The system calls the employee. The employee can click Answer and listen in on the call without the caller knowing and can click Conference to join the interaction at any time.

Using Camp on

The Camp on feature is available when you make a call to an extension and receive a busy signal because the employee is already on a call. Camp on notifies the employee you are attempting to call with a series of audible beeps.

NOTE:

- Callers cannot camp on to your extension if you have call forwarding or voice mail configured on the extension.
- You cannot camp on to an extension that is in Make Busy or Do Not Disturb.

To camp on to an extension

1) In the dial box, type an extension number.
2) Click **Dial**.
3) If you receive a busy signal, click **Camp on**.

   The employee you called will hear a series of beeps and can click Retrieve to place the caller on hold and speak with you. After speaking with you, the employee can click Swap to return to the caller.

Leaving and retrieving messages

The Leave a message feature is available when you make a call to an extension that is idle or on a call. You must use the dial pad to type a number when you are retrieving a message.

To leave a message

1) In the dial box, type an extension number.
2) Click **Dial**.
3) If the employee does not answer, click **Leave a message**.

   The telephone system leaves a message waiting notification on the employee's extension and the Contact Center Client icon flashes red and white in the employee's system tray.

To retrieve a message

1) Click **Dial pad** and type the number configured in the telephone system for message retrieval.
2) Press **Enter**.

   The automated attendant will ask you for your password.
3) Type your password on the dial pad.
4) Follow the instructions provided by the automated attendant to retrieve the message.

NOTE: If agents leave Call me back messages you must use your physical phone set to retrieve the messages.

Using Call me back

The Call me back feature is available when you make a call to an extension that is idle or on a call. When you select the Call me back button, the telephone system monitors the called employee’s other extension. When the employee’s other extension returns to idle, your phone rings. If you pick up the call, the employee’s phone will ring. If you do not pick up the call, the callback will expire.

To leave a callback message

1) In the dial box, type an extension number.
2) Click **Dial**.
3) If the employee does not answer, click **Call me back**.

   The telephone system monitors the called employee’s extension. Your phone will rings when the called employee’s other extension returns to the idle state.
4) When your phone rings, click **Answer** to pick up the call and speak with the employee.

Tagging calls with Account Codes

If your system is set up to use Account Codes, you can apply them during a call. Classification Codes are a type of Account Code, but differ in that you can apply them during or after a call. Classification Codes can only to be applied to ACD calls. If you are set up to use Account Codes, you are not necessarily also set up to use Classification Codes.

To tag an in-progress call with an Account Code or a Classification Code

- Click the down arrow adjacent to the **Account Code** button and select a traditional Account Code or a Classification Code.

After hanging up, while in Work Timer mode, you can tag calls with Classification Codes.

To tag a call, after hanging up, with a Classification Code

1) Click the down arrow adjacent to the **Account Code** button.
2) Select **After Call Classification** and select the appropriate Classification Code from the drop-down list.

Making and terminating calls using Contact Center PhoneSet Manager

When you make calls, on the Functions toolbar you can readily select contacts you pre-configure in CCMWeb, or speed dial numbers you configure in Contact Center PhoneSet Manager. See *"Configuring speed dial numbers"* and *"Displaying, hiding, and retiring toolbar buttons"*.

You can dial any extension number or phone number. Contact Center PhoneSet Manager typically uses your primary extension to make calls. You can optionally select a different extension on the Phone toolbar to make calls.

Making calls to your contacts

To make a call to an extension in your contact list

1) Click the arrow adjacent to the dial box and click the **Contacts** tab.
2) Double-click a contact in the list.

Making calls to contacts who have called you recently

To make a call to a contact who has called you recently

1) Click the arrow adjacent to the dial box and click the **Recent** tab.
2) Double-click a contact in the list.

Making calls using speed dial

To dial using speed dial

- Click **Speed dial** and select a name in the list.

Redialing numbers

To dial the contact who last called you

- Click **Speed dial** and select a name in the list.

Terminating calls

To terminate a call

- Click **Hang up**.

  *Alternatively, on the Phone toolbar, click **Cancel**.*

Forwarding and answering calls using Contact Center Softphone

You can forward calls manually to pre-configured call forward destinations without having to speak to the caller first. In addition, you can configure and enable call forwarding so the telephone system forwards calls to other answer points when you are temporarily unavailable or away from the officein-active. See *"Configuring call forward destinations"*.

If a call is ringing on your extension and you click the Forward button, the call will be forwarded to the default call forward destination configured in the telephone system. If you click the down arrow adjacent to the Forward button, you can select an extension or phone number for call forwarding.

Forwarding calls

When a call is ringing on your extension, to forward the call

1) Click **Forward**.
2) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Forward button and select a contact.

Answering calls

When an agent receives a call with Contact Center Softphone, detailed caller information is displayed on the desktop. (See the following figure.)Agents can choose to answer the call or forward it to another agent. Additionally, the display can provide access to call notes, which are notes an agent adds to the call before transferring it. See *"Adding call notes to a call"*.

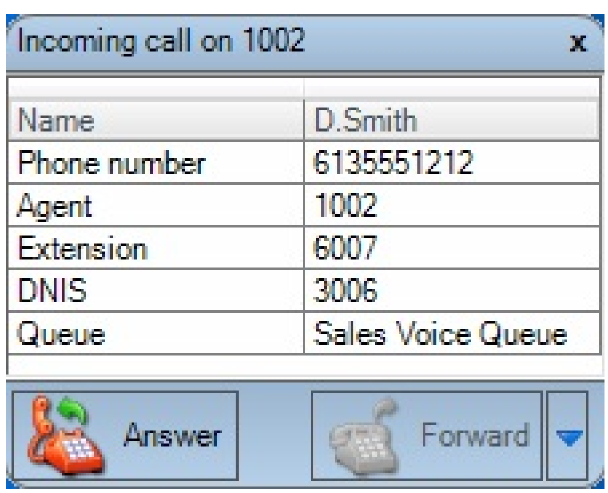
If configured and available the following information is provided in the soft phone display

- **Caller name**—name of the caller
- **ANI**—telephone number of the caller
- **DNIS**—telephone number the caller dials
- **DNIS name**—the name associated to the DNIS number in YourSite database
- **Agent ID**—agent who transferred the call
- **Extension**—extension from which the call was transferred
- **Queue**—queue from which the call originated
- **Collect Caller Entered Digits**—digits the caller enters for identification purposes, such as a customer site key
- **Customer Collected Information**—information collected from a third party OBDC database
- **Call notes**—notes added by an agent

  NOTE: Call notes are supported for inbound calls only.

You can answer calls by right-clicking the Contact Center Softphone system tray icon and selecting Answer, or by clicking the Answer toolbar button.

Figure 84: Contact Center Softphone display



To answer a call using Contact Center Softphone

- Click **Answer**.

Handling calls using Contact Center Softphone

You can handle calls by right-clicking the Contact Center Softphone system tray icon and selecting telephony functions, or by selecting telephony buttons on the Functions toolbar. The telephony buttons available depend on the action you last performed. You can configure the toolbar buttons so they are always visible, or visible only when required. See *"Displaying, hiding, and retiring toolbar buttons"*.

When you pre-configure speed dial numbers in Contact Center Softphone, these contacts are available in drop-down lists adjacent to the Speed dial, Trans/Conf, and Request help buttons on the Functions toolbar. See *"Configuring speed dial numbers"*.

Placing calls on hold

To place a call on hold

- Click **Hold** (red oval button).

Retrieving calls

You can retrieve a held call, or retrieve a call when a call is camped on to your extension.

When an agent is on a call and another caller camps on to their extension, the Retrieve button is enabled. When the agent presses the Retrieve button, they can talk to the held party. From that point on, the agent uses the Swap button to switch back and forth between the two callers (current and held parties).

To retrieve a call

- Click **Retrieve**.

Using Mute

To use Mute

1) Click **Mute**.
   The system disables your microphone so you can consult privately with another employee.
2) To restore your microphone, click **Resume**.

Transferring calls

You can perform a blind transfer or a supervised transfer.

To perform a blind transfer

1) While on a call, click **Trans/Conf**.
2) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line if required). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.
3) Click **Hang up**.

To perform a supervised transfer

1) While on a call, click **Trans/Conf**.
2) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.

   The system places the caller on Hold.
3) Wait for the called party to answer. If you receive a busy signal or a voice mail greeting, click **Cancel** to return to the initial party. Otherwise, speak to the agent and identify the caller.
4) Click **Transfer** to transfer the call.

Conferencing calls

You can include up to eight people in a conference call. The following example illustrates a three-way conference call.

To set up a conference call

1) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line).
2) Click **Dial**.
3) After you speak with the person who answers, click **Trans/Conf** to add a person to an in-progress call.

   The system places the person on hold.
4) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.
5) Click **Dial**.
6) Speak to the person who answers.
7) Click **Conference** to initiate a three-way conference call.

To split a conference call

1) Click **Split**.

   The last person you added to the conference call is placed on hold, and you can speak privately with the first person.

Consulting with people while on calls

To consult with a person while on a call

1) Click **Trans/Conf** to conference in the person.

   The system places the initial party on Hold.
2) In the dial box, type an extension or phone number (preceded by a number you dial to access an outside line). Otherwise, click the down arrow adjacent to the Trans/Conf button and select a contact.
3) Click **Dial**.

4) After you consult with the person, either click **Conference** to conference in the person, click **Cancel** to hang up on the person, click **Transfer** to transfer the call to the person, or click **Swap** to talk to the initial party.

Requesting help while on calls

To request help while on a call

1) Click **Request help**.
2) On the dial pad, type the extension number of the employee you want to call. Otherwise, click the down arrow adjacent to the Request help button and select a contact.
3) Click **Dial**.

   The system calls the employee. The employee can click Answer and listen in on the call without the caller knowing and can click Conference to join the interaction at any time.

Using Camp on

The Camp on feature is available when you make a call to an extension and receive a busy signal because the employee is already on a call. Camp on notifies the employee you are attempting to call with a series of audible beeps.

NOTE:

- Callers cannot camp on to your extension if you have call forwarding or voice mail configured on the extension.
- You cannot camp on to an extension that is in Make Busy or Do Not Disturb.

To camp on to an extension

1) In the dial box, type an extension number.
2) Click **Dial**.
3) If you receive a busy signal, click **Camp on**.

   The employee you called will hear a series of beeps and can click Retrieve to place the caller on hold and speak with you. After speaking with you, the employee can click Swap to return to the caller.

Leaving and retrieving messages

The Leave a message feature is available when you make a call to an extension that is idle or on a call. You must use the dial pad to type a number when you are retrieving a message.

To leave a message

1) In the dial box, type an extension number.
2) Click **Dial**.
3) If the employee does not answer, click **Leave a message**.

   The telephone system leaves a message waiting notification on the employee's extension and the Contact Center Client icon flashes red and white in the employee's system tray.

To retrieve a message

1) Click **Dial pad** and type the number configured in the telephone system for message retrieval.
2) Press **Enter**.

   The automated attendant will ask you for your password.
3) Type your password on the dial pad.
4) Follow the instructions provided by the automated attendant to retrieve the message.

NOTE: If agents leave Call me back messages you must use your physical phone set to retrieve the messages.

Using Call me back

The Call me back feature is available when you make a call to an extension that is idle or on a call. When you select the Call me back button, the telephone system monitors the called employee's other extension. When the employee's other extension returns to idle, your phone rings. If you pick up the call, the employee's phone will ring. If you do not pick up the call, the callback will expire.

To leave a callback message

1) In the dial box, type an extension number.
2) Click **Dial**.
3) If the employee does not answer, click **Call me back**.

   The telephone system monitors the called employee's extension. Your phone will rings when the called employee's other extension returns to the idle state.
4) When your phone rings, click **Answer** to pick up the call and speak with the employee.

Tagging calls with Account Codes

If your system is set up to use Account Codes, you can apply them during a call. Classification Codes are a type of Account Code, but differ in that you can apply them during or after a call. Classification Codes can only to be applied to ACD calls. If you are set up to use Account Codes, you are not necessarily also set up to use Classification Codes.

To tag an in-progress call with an Account Code or a Classification Code

- Click the down arrow adjacent to the **Account Code** button and select a traditional Account Code or a Classification Code.

After hanging up, while in Work Timer mode, you can tag calls with Classification Codes.

To tag a call, after hanging up, with a Classification Code

1) Click the down arrow adjacent to the **Account Code** button.
2) Select **After Call Classification** and select the appropriate Classification Code from the drop-down list.

Controlling your availability

You can log yourself on or off, cancel Work Timer, cancel Reseize Timer, and place yourself in or remove yourself from Make Busy with reason or Do Not Disturb with reason using the soft phone.

To log on to the ACD

- Click **Actions > Log on** and select an agent ID.

To log off of the ACD

- Click **Actions > Log off**.

To set Make Busy with reason

- Click **Actions > Set Make Busy** and select a Make Busy Reason Code.

To remove Make Busy with reason

- Click **Actions > Remove Make Busy**.

To set Do Not Disturb with reason

- Click **Actions > Set Do Not Disturb** and select a Do Not Disturb Reason Code.

To remove Do Not Disturb

- Click **Actions > Remove Do Not Disturb**.

To cancel Work Timer

- Click **Actions > Cancel Work Timer**.

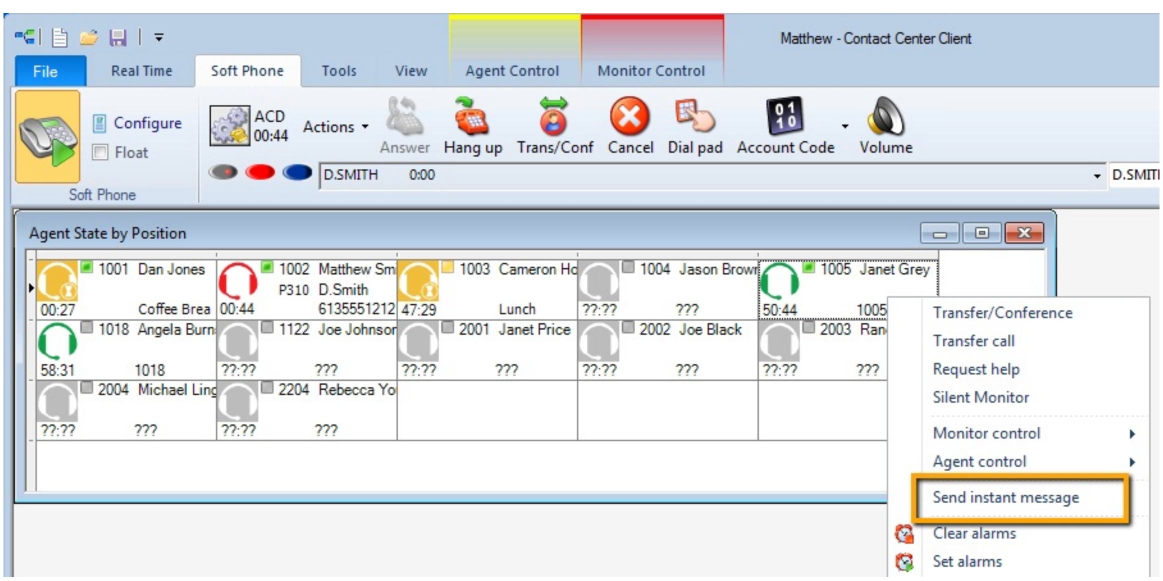
To cancel Reseize Timer

- Click **Actions > Cancel Reseize Timer**.

Making and handling calls using Contact Center Client

You can open an agent, employee or extension monitor, or the Queue Now monitor and either right-click an agent and select telephony functions or access telephony functions by selecting an agent and accessing the options in the Contact Center Client ribbon. For example, when you are on a call you can consult with an idle employee by right-clicking the employee's cell and clicking Transfer/Conference, or by sending the employee an instant message. (See the following figure.)

Figure 85: Consulting with a person while on call



Making calls

To call an agent using Contact Center Client

- Right-click the cell of an idle agent and click **Call**.

Alternatively:

1) Select an idle agent in an open monitor.
2) Click the **Softphone** button under the Extension Control tab in the Contact Center Client **Real Time** ribbon.
3) Choose the **Call** menu item.

Forwarding calls

If a call is ringing on your extension, to forward the call using Contact Center Client

- Right-click the cell of an idle agent and click **Forward**.

Answering calls

If a call is ringing on another agent's extension, to pick up the call using Contact Center Client

- Right-click the cell of the agent and click **Pick up**.

Adding call notes

When agents are speaking with customers, they can add notes to calls to share with other contact cente-remployees involved in the call. This ensures agents and supervisors have context on calls and know what information has been provided to customers upon call transfer. If the call is transferred, call notes are preserved. Call notes are not preserved when calls are parked. See "Adding call notes to a call".

NOTE:

- Before adding call notes, ensure the 'Display call notes' option is enabled in the Softphone configuration window. This option is disabled by default.
- Call notes are supported for inbound calls only.

To add a call note

1) As a call is ringing on your extension, on the soft phone display click **Answer** to answer the call.
   Contact Center Client appears on top of all open applications and displays the Call Notes monitor.
2) After **Enter a new call note**, type a note.
   Call notes can include a maximum of 100 characters.
3) Click **Add**.
   The call note is added to the Call notes text box and is included in the soft phone display upon call transfer.

Recording calls

There are occasions when a user wants to temporarily stop recording a call for confidentiality reasons, or, if the call is not currently being recorded, the user may want to start recording if the interaction becomes hostile or sensitive in nature and a call record may be required. On the Agent State by Time, Agent State by Position, Agent State by Queue by Time, and Extension Now monitors, the Call recording option enables you to start, stop, and restart call recording at any time during a call, using MiVoice Call Recording functionality. Requirements for this on-demand call recording feature are Contact Center PhoneSet Manager or Contact Center Softphone, and the MiVoice Call Recording Connector .

To record a call

- Right-click the associated cell of an agent or extension and select **Call Recording > Start Recording**.

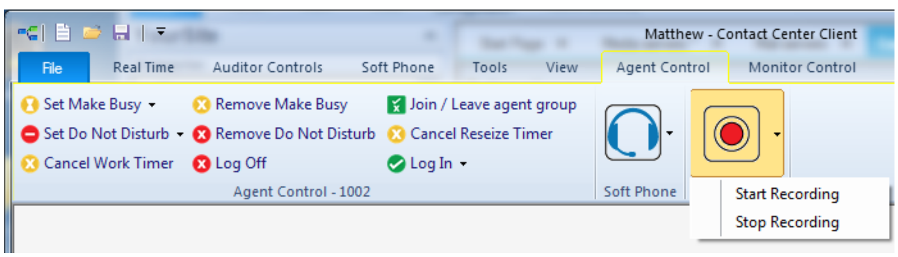
To stop recording a call

- To stop recording, right-click the cell and select **Call Recording > Stop Recording**.

Alternatively:

1) Select the cell of an agent or extension in a monitor whose call you want to record.
2) In the Contact Center Client **Real Time** ribbon, under the **Agent Control** tab, select **Start Recording** from the drop-down list in the **Call Recording** column.
3) To stop recording, select **Stop Recording** from the drop-down list in the **Call Recording** column.
   See the following figure.

Figure 86: Call recording



Silent monitoring calls

Silent monitoring is the process of listening to the voice interactions of internal or external calls between agents orextensions and callers. Silent monitoring enables you to track call handling techniques and determine where improvements can be made in individual performance. If required, supervisors can conference into the call they are silently monitoring to talk to the customer. For more information, see *"Conferencing calls"* for Contact Center Softphone or see *"Conferencing calls"* for Contact Center PhoneSet Manager.

Silent monitoring is a MiVoice Business feature leveraged by MiContact Center Business. With MiVoice Business 7.0+, supervisors can select an agent or extension for silent monitoring at any time, but the monitoring does not begin until the agent or extension answers or makes a call. The monitoring is maintained so long as the agent or extension remains on the call. The supervisor hears everything the agent hears during the course of the call, including conferences and voicemail. If the agent moves to a call on another line, silent monitoring will follow the agent over to that line. Up to six supervisors can silently monitor an agent or extension. MiVoice Business 7.0+ also enables supervisors to coach agents on call. For more information, see *"Coaching agents on call with customers"*.

Silent Monitor can be accessed through Contact Center Client or, if programmed on your 3300 media server, through entering a Feature Access Code (FAC) on your phone or in MiCollab Client. For more information about silent monitor and its features and enhancements, consult your Mitel Mi Voice Business documentation.

NOTE:

- The monitoring extension and the extension being monitored must coexist on the same telephone system.
- The monitoring extension must be permitted by security role to interactively control other agents.
- The monitoring extension's soft phone toolbar must be open.
- Supervisors can initiate silent monitor from either a Mitel desk phone (using Feature Access Code) or from the Supervisor Client, Contact Center Client. Agents can be silent monitored regardless of the device they are using (Mitel desk phone, Contact Center Client softphone, or MiCollab softphone).

The following procedures explain how to

- Silently monitor a call using Contact Center Client
- Silently monitor a call using Contact Center Client and a Feature Access Code

The following procedures take place in an open real-time agent or extension monitor

To silently monitor a call using Contact Center Client

- Right-click the cell of an agent or extension and select **Silent Monitor**.

Alternatively:

1) Select the cell of an agent or extension in a monitor whose call you want to silent monitor.
2) In the Contact Center Client **Real Time** ribbon, under the**Agent Control** or **Extension Control** tab, click the **Softphone** button and click **Silent Monitor**.

   NOTE: If the telephone system settings are incorrect or the monitoring extension and the extension being monitored are on separate telephone systems, you will be unable to Silent monitor and will instead see 'Not Allowed' when you right-click the cell. If the extension you want to monitor is not currently on a call, you will see 'Waiting' when you right-click the cell.

To silently monitor a call using Contact Center Client and a Feature Access Code

1) In the dial box, type the **Feature Access Code** followed by the agent or extension number.
2) Click **Dial**.

Coaching agents and extensions on a call with customers

Supervisors can communicate with agents or extensions they are silently monitoring while they are on a call with a customer through Whisper Coach. Whisper Coach is a feature of silent monitor, enabling supervisors monitoring agents extensions to talk to the agent extension and coach them through their call, without letting the customer hear what the supervisor is saying. Supervisors can also coach agents extensions who are not actively handling a call. If required, supervisors can conference into an active call while coaching to talk to the customer. For more information, see *"Conferencing calls"* for Contact Center Softphone or see *"Conferencing calls"* for Contact Center PhoneSet Manager.

Once a supervisor starts silent monitoring an agent, they have the option of toggling coaching on and off through their IP hardset or the Contact Center Softphone toolbar. Whisper Coach is not automatically disabled when the agent completes the call or switches to a different call. If the supervisor does not stop coaching, the Whisper Coach feature automatically activates the next time the agent makes or answers a call. Only one supervisor can whisper coach an agent at a time. A supervisor can also whisper coach another supervisor, including supervisors actively whisper coaching an agent. If a supervisor whisper coaches another supervisor who is coaching an agent, the supervisor will hear the coached supervisor and the agent, but only the coached supervisor will hear you.

For more information on Whisper Coach, consult your Mitel documentation.

The following procedures explain how to

- Whisper to an agent or extension that you are silent monitoring with Contact Center PhoneSet Manager
- Stop whispering to an agent or extension that you are silent monitoring with Contact Center PhoneSet Manager
- Whisper to an agent or extension that you are silent monitoring with Contact Center Softphone
- Stop whispering to an agent or extension that you are silent monitoring with Contact Center Soft-phone

To whisper to an agent or extension that you are silent monitoring with Contact Center PhoneSet Manager

- On your hardset, press **Coach On**.

To stop whispering to an agent or extension that you are silent monitoring with Contact Center PhoneSet Manager

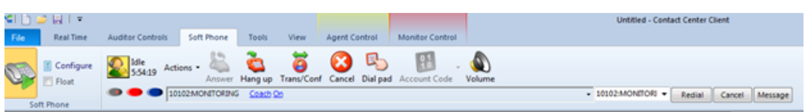
- On your hardset, press **Coach Off**.

To whisper to an agent or extension that you are silent monitoring with Contact Center Softphone

- In the **Softphone** toolbar, click **Coach On**.

  See the following figure.

Figure 87: Softphone coach on



To stop whispering to an agent or extension that you are silent monitoring with Contact Center Soft-phone

- In the **Softphone** toolbar, click **Coach Off**.

Transferring calls

To perform a blind transfer using Contact Center Client

- While on a call, right-click the cell of an idle agent active extension and click **Transfer call**.

Alternatively:

1) Select the cell of an idle agent in a monitor.
2) In the Contact Center Client **Real Time** ribbon, under the **Agent Control** tab, click the **Softphone** button and click **Transfer call**.

Consulting with employees while on calls

To consult with an employee while on a call using Contact Center Client

1) Right-click the cell of an idle agent and click **Transfer/Conference**.

   The system places the initial party on hold.

2) In the dial box, type an extension or phone number. Otherwise, click the down arrow adjacent to the Transfer/Conference button and select a contact.

3) Click **Dial**.

4) After you consult with the employee, either click **Conference** to conference in that person, click **Transfer** to transfer the call to the employee, click **Swap** to talk to the other party, or click **Cancel** to end the consultation call.

Requesting help while on calls

To request help while on a call using Contact Center Client

- Right-click the cell of an idle agent and click **Request help**.

  The system calls the employee. The employee can click Answer in the soft phone and listen in on the call without the caller knowing. The employee can click Conference in the soft phone to join the interaction at any time.

Option and Preference of CC Client

Configuring Contact Center Client options

You can customize the Contact Center Client user interface and real-time monitor device control and display options by accessing the Options menu.

To configure Contact Center Client options

1) In the ribbon, click the **File** tab.

2) Click **Options**.

   The Options window displays.

   See the following figure.

3) Under **User interface display**, select a **Toolbar style**, **Real-time icon** type, **Background** color, **Page size**, and whether you want to hide Contact Center Client when the window is minimized.

4) Select **Context Sensitivity** for **Monitors** if you want the context sensitive tab to automatically become the active tab when you select a monitor.

   NOTE: Monitor context sensitivity is enabled by default.

5) Select **Context Sensitivity** for **Soft phone** if you want the soft phone tab to automatically become the active tab when a call is received.

   If the Soft phone toolbar is floating, context sensitivity does not apply. Soft phone context sensitivity is disabled by default.

6) Select the **Display monitor device control option** check box if you want to be able to see the option for monitor control when you right-click cells in a real-time monitor.

   NOTE: Monitor control enables you to simultaneously control all of the agents on a monitor and is only available if you have appropriate permissions.

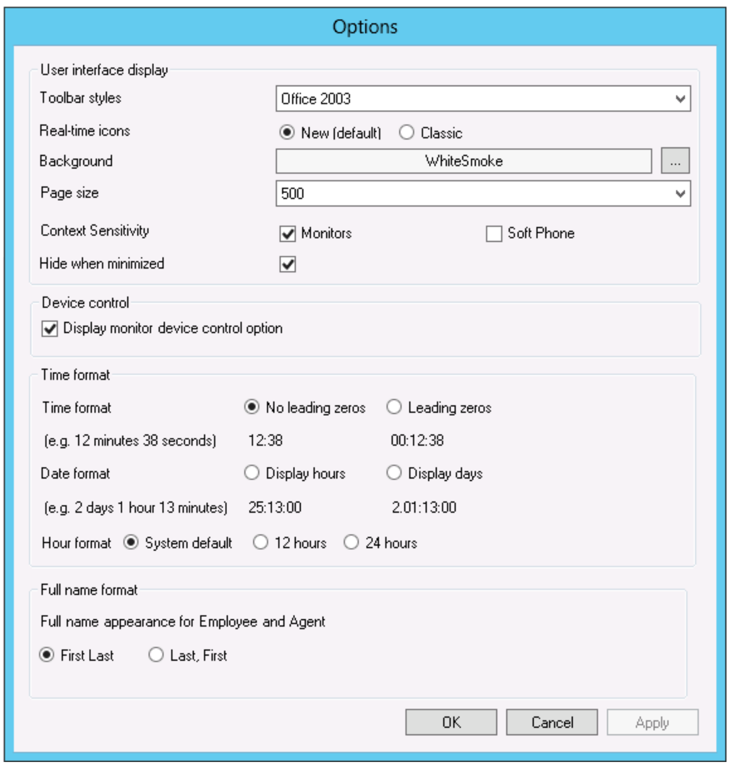
7) Configure **Time format** options.

   The options you select will display in the real-time monitor cells.

8) Under **Full name format**, select how you want agent and employee first and last names to display in real-time monitors.

9) Click **OK**.

Figure 88: Contact Center Client options



Adjusting the Contact Center Client view

You can adjust the way you view Contact Center Client features on your desktop.

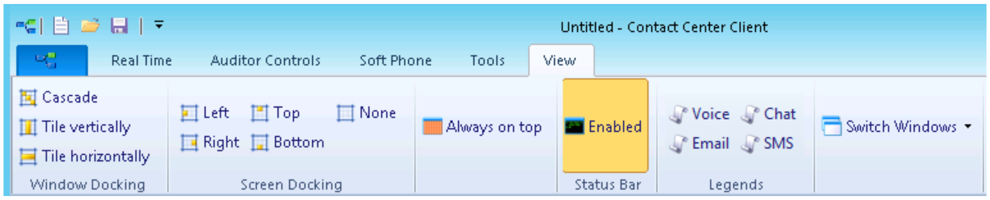
To adjust the view

1) Click **View** in the Contact Center Client ribbon.

   The View options ribbon opens.

   See the following figure.

Figure 89: View options ribbon



2) To change the way monitors display inside Contact Center Client, select from the options in the **Window Docking** column.

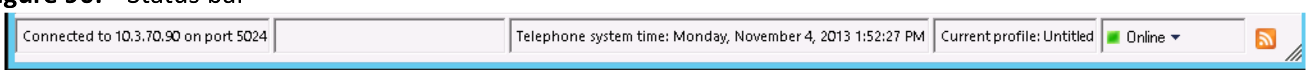
3) To adjust the position of the Contact Center Client window on your desktop, select from the options in the **Screen Docking** column.

4) If you want Contact Center Client to always display on top of other applications on your desktop, click **Always on top**.

5) Enable the **Status Bar** if you want the status bar to be visible at the bottom of the Contact Center Client window.

   See the following figure.

Figure 90: Status bar



6) To open Voice, Email, Chat, or SMS legends, select from the options in the **Legends** column.

1.5. Managing Multimedia Contact Center

Supervisors use the following applications in order to effectively manage contact center employees.

- Contact Center Client
- Ignite
- CCMWeb

For information on how to manage a contact center, see *Multimedia Contact Center Installation and Deployment Guide*, *Chapter 2 - Managing a Multimedia Contact Center.*

1.6. Forecasting

Forecasting is the basis of estimating required resources to handle a contact center's workload. Using historical data generated by the ACD routing system for both voice and other media types, forecasting allows you to adjust key modifiers to predict the number of agents required, by interval, to handle the predicted workload.

The Forecasting tool available in Contact Center Client and Workforce Scheduling enables users to quickly choose historical data from both voice and multimedia queues or queue groups to use in the forecast, providing average transaction traffic by day of week, by media, as well as by historic manned agents and handling statistics for user-selected intervals of time. Supervisors can create forecasts based on historic contact center volumes and manually adjust various modifiers to generate hypothetical or future anticipated traffic scenarios, optimizing the balance between the agents required to handle the anticipated traffic with the expected handling time, wrap up time and Service Level objectives. The Forecasting tool lets you adjust key statistics together with intra-day contact volumes rather than only daily statistics which provides a much more accurate output of agents required per interval. For example, you may have a situation where calls coming into your call center are more complex earlier in the day and/or earlier in the week creating a higher demand for agents to be available at these times. It is possible that handling time drops throughout the day and the demand for agents reduces, allowing for alternate options for agents such as off line work, team meetings or performance reviews.

Your ability to forecast is limited only by the available ACD routing data collected and available in your SQL database. For example you may choose to take the last few weeks to help predict the next few weeks or you could take the last year to help predict the average traffic per week, or you might want to only take the period of time in the past where you ran a particular campaign/season to anticipate the amount of traffic to expect for a similar upcoming campaign/season, etc. After you run a forecast, you could examine the data and make adjustments based on current or anticipated contact center conditions. You could then tweak the forecast as required.

NOTE: Ring Groups are not supported with Forecasting, either as queues or as a member of a reporting queue groups.

Forecasting terms

Conducting a forecast involves accurately estimating Time to Handle, Wrap Up Time, and Contacts Offered values. The following terms are used in forecasting resource requirements:

- **Service Level percent**

  Service Level Percent = Service Level Count ÷ ACD offered

  For calls and chats, the Service Level Percent is the number of interactions that are handled, abandoned, and interflowed before a defined threshold time (Service Level time), compared to the total number of Multimedia Contact Centers handled, abandoned, and interflowed. The Service Level Percent = (Handled + Abandoned (long) + Interflowed (long)) within the Service Level time ÷ Total (Handled + Abandoned (long) + Interflowed (long)).

  For email and SMS, the Service Level Percent is the number of interactions that are handled and interflowed before a defined threshold time (Service Level time), compared to the total number of interactions handled and interflowed. The Service Level Percent = (Handled + Interflowed (long)) within the Service Level time ÷ Total (Handled + Interflowed (long)).

- **Service Level time**

  Service Level Time is the time used in calculating the Queue Service Objective. For example, your Queue Service Objective may require queue members to handle 80% of interactions within 120 seconds. 120 seconds is the Service Level Time. Queue Service Objectives, which includes Service Level Time, are specified for individual queues.

- **Wrap Up time**

  Wrap Up Timeis a real-time and reporting statistic detailing the total time an agent spends in the Work Timer state. The Wrap Up Time is a standardized period. If an agent requires additional time *to complete paperwork or online transactions, the agent can leave the ACD queue temporarily for this purpose.*

- **Agent Efficiency percent**

  Agent Efficiency percent is the percentage of time agents spend on ACD interactions relative to the time agents are scheduled to work. Agent efficiency is calculated using a straight linear relationship. For example, 50% agent efficiency means that two more agents are required to handle the forecasted workload. An Agent efficiency percentage of 100 is unrealistic. Agents routinely take breaks, perform other Non ACD duties, make outgoing calls, and place themselves in Make Busy.

- **Contacts Offered**

  You can predict the queue member requirement for your Service Level percent and Service Level time targets by applying the Erlang C equation to the estimated Call Load and average ACD Handling Time.

- **Manned Agents**

  Manned Agents is the average number of agents who were logged on for the interval of time being forecasted.

- **Average Handle Time**

  Average Handle Time is the average time queue members spend handling interactions, and is determined by comparing the interaction duration to the number of interactions offered.

  NOTE:

  – The Average Handle Time in the Forecasting tool is calculated differently than the Average Handling Time in CCMWeb reports, which is determined by comparing interaction duration to the number of interactions answered.

  – The Daily Average Handle Time in the Forecasting tool is calculated from the interval rows in the forecast and may differ from the Average Handling Time for that day in contained in a report.

- **Time to Handle**

  Time to Handle is the average time calls wait in queue before being handled.

- **ACD Handling Time**

  ACD Handling time is the talk time plus the hold time. If a queue member calls a supervisor in search of more information (while the caller is on hold) and/or transfers or conferences the call, the system adds these times to the ACD Handling Time value.

- **Call Load**

  The term Call Load is to the combined effect of the number of interactions received by the ACD queue and their duration, or the calls offered x (average ACD Handling Time + average Wrap Up Time).

Forecasting tool

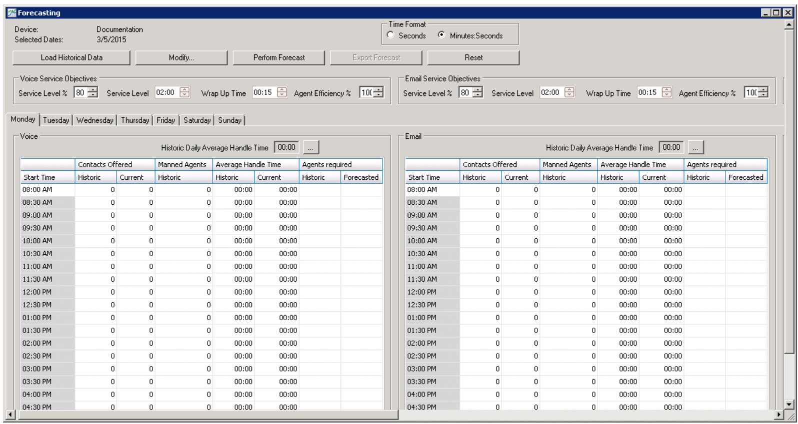
The Forecasting tool is accessed via Contact Center Client. If you are licensed for Workforce Scheduling, you can also access it in that application under the Tools tab. In order to access the Forecasting tool, your security role must have the 'May manage Forecasting' option enabled.

You use the Forecasting tool to create forecasts based on historical contact center traffic volumes. After loading historical data into the tool, you can perform 'what-if' scenarios and optimize the balance between the agents scheduled and your Service Level objectives.

The Forecasting tool offers a tabbed interface for viewing and setting historical data for each day of the week. If more than one media type has been included in the historical data, each day's tab will have a section for each media type included in the historic data. The forecast grid is divided into rows based on the interval time selected when loading historical data, enabling users to adjust statistics by 15, 30, or 60 minute intervals. The statistics have Historic and Current values, which display the original values from the loaded historical data and the current values after user modification respectively.

After a forecast has been performed, each day lists the agents required for each interval. The follwoing figure shows the Forecasting tool.

Figure 91: Forecasting window



To forecast resource requirements you

1) Load historical data.

   See "Loading historical data".

2) Modify historical data if required.

   See "Modifying historical data".

3) Perform a forecast.

   See "Performing forecasts".

4) Export the forecast.

   See "Exporting forecasts".

To access the Forecasting tool

1) Click **Tools** in the Contact Center Client ribbon.
2) In the **Data Mining** section, click **Forecasting**.

Loading historical data

When you load historical data, you include data from a queue or queue group over a historical period that best represents the contact center activity for the time period for which you are trying to forecast.

You can select one or more specific dates and/or date ranges when loading historical data. You can select sequential or non-sequential dates (for example, Monday, Wednesday, and Friday) to use in the forecast. You can also exclude specific dates from within your date range.

NOTE:

- Users should identify and exclude any outliers or extreme values from the time period from which they are loading historical data, as these may give artificial values.
- Historical data for agents can be validated by comparing it to the queue and queue group by period reports for the same periods.
- Ring Groups are not supported with Forecasting, either as queues or as a member of a reporting queue groups.

The following procedure takes place in an open Forecasting tool window.

To load historical data

1) Click **Load historical data**.

   The Forecasting window opens.

2) Under **Queues** or **Queue groups**, click on the queue or queue groups you want to use as the source of historical data.

   NOTE: You can load historical data for a queue or queue group. If you are using the forecast to build a schedule, select historical data from the same queue group with which the schedule is associated. This data will best represent the agents required for your schedule.

3) If you want to include or exclude data from a specific date, under **Historical date(s) for the forecast**, select **Specific day** and then select a date.

4) If you want to include or exclude data from a date range, click **Date range** and specify a range of dates.

5) If you are including the data from the specified date(s), click **Include dates**.

6) If you are excluding the data from the specified date(s), click **Exclude dates**.

7) Repeat steps 3-6 until you have specified the date(s) or date range(s) from which you will derive your historical data.

8) After **Start hour** and **End hour**, select the time frame for historical data.

9) After **Interval**, select the schedule interval: 15, 30, or 60 minutes.

   The Interval value, in minutes, is the time increment by which the forecast will be displayed. It is recommended that you select an interval that matches the increments in which you schedule your employees. For example, if you schedule your employee shifts in 30 minute increments, select 30 minutes as the Interval value.

10) Click **Submit**.

Modifying historical data

After loading your historical data, you can modify the values of Contacts Offered and Average Handle Time to generate different forecast results based on the modified values. You can also modify values after performing forecasts to obtain different forecasts of required agents. The historical values for data are always displayed, regardless of modifications, for comparison.

Modifying Average Handle Time

You can modify the Average Handle Time value for an interval, a day, or several days simultaneously. When you select a modification to apply to a value, either the Historic or Current value, it is applied as the new Current value. You cannot change the Daily Average Handle Time, but you can use it to modify the Average Handle Time of other intervals.

The following procedures outline how to

- Modify the Average Handle Time parameter on the forecast grid
- Modify an interval's Average Handle Time parameter
- Modify the Average Handle Time parameter using the Historic Daily Average Handle Time parameter

The following procedures take place in an active Forecasting tool window.

To modify the Average Handle Time parameter on the forecast grid

1) Click **Modify... > Average Handle Time**.

   Alternatively, select an interval row, click the cell for Current Average Handle Time, and click the … button.

   See the following figure.

2) Under **Specify the Average Handle Time value(s)**, specify how you want to modify Average Handle Time:
   - Increase or decrease Average Handle Time by a specific number of seconds
   - Increase or decrease Average Handle Time by a specific percentage
   - Set the Average Handle Time to a specific number of seconds

3) Under **Apply the changes to the following data source**, specify if you want to have the modification applied to the original value or the current grid value.
4) Under **Apply to days**, select the days for which you want to modify Average Handle Time.
5) Under **Apply to media type**, select the media types for which you want to modify **Average Handle Time**.
6) Click **Apply**.

To modify an interval's Average Handle Time parameter

- Select an interval row, click the cell for **Current Average Handle Time**.
- Set the Average Handle Time parameter for the interval.

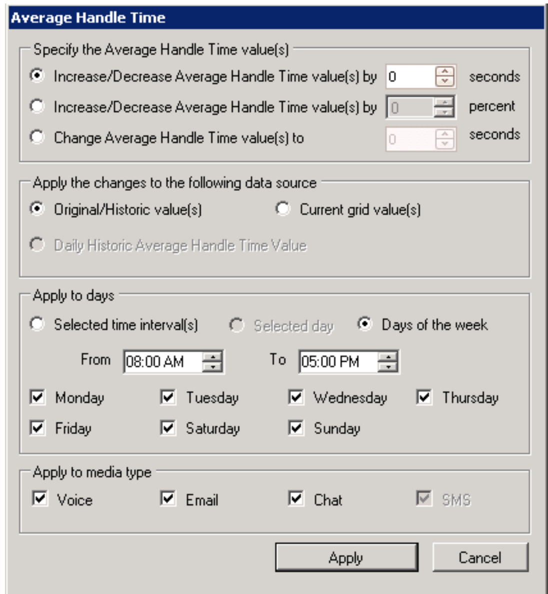
To modify the Average Handle Time parameter using the Historic Daily Average Handle Time parameter

1) Click the **…** button after Historic Daily Average Handle Time.
2) Under **Specify the Average Handle Time value(s)**, specify how you want to modify the Historic Daily Average Handle Time:
   - Increase or decrease Average Handle Time by a specific number of seconds
   - Increase or decrease Average Handle Time by a specific percentage
   - Set the Average Handle Time to a specific number of seconds

3) Under **Apply to days**, select the interval(s) for which you want to apply the modified Historic Daily Average Handle Time.

4) Click **Apply**.

Figure 92: Average Handle Time window



Modifying Contacts Offered

You can modify the Contacts Offered value for one or several time intervals simultaneously. When you select to modify a value, either Historic or Current, it is applied as the new Current value.

This section explains how to:

- Modify the Contacts Offered parameter on the forecast grid
- Modify an interval’s Contact Offered parameter

The following procedures take place in an active Forecasting tool window.

To modify the Contacts Offered parameter on the forecast grid

1) Click **Modify... > Contacts Offered**.

   See the following figure.

2) Under **Specify how you want to change the Contacts Offered value(s)**, specify how you want to modify Contacts Offered:

   – Increase or decrease Contacts Offered by a specific number of calls

   – Increase or decrease Contacts Offered by a specific percentage

   – Set the Contacts Offered to a specific number of call

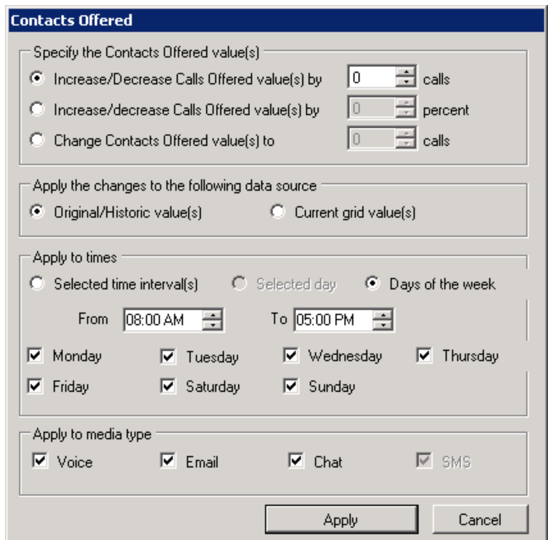
3) Under **Apply the changes to the following data source**, specify if you want to modify the original value or the current grid value.

4) Under **Apply to times**, select the days and time interval for which you want to modify Contacts Offered.
5) Under **Apply to media type**, select the media types for which you want to modify Contacts Offered.
6) Click **Apply**.

To modify an interval's Contacts Offered parameter

1) Select an interval row, click the cell for **Current Contacts Offered**.
2) Set the Current Contacts parameter for the interval.

Figure 93: Contacts Offered window



Modifying the weekly total for Contacts Offered

You can modify the Contacts Offered values for an entire week simultaneously. Modifying these values changes the number of Contacts Offered while maintaining the same proportion of calls across all time intervals. For example, if you increase the weekly total by 10 percent, an interval with 10 calls will change to 11. However, an interval with zero calls will remain zero.

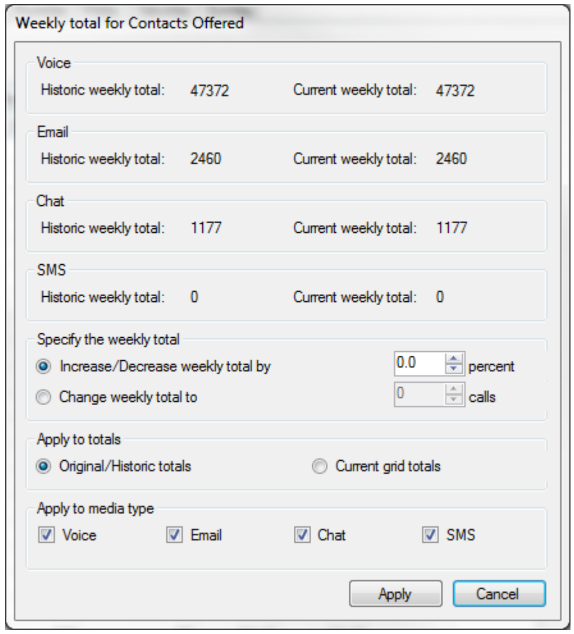
The following procedure takes place in an active Forecasting tool window.

To modify the Contacts Offered parameter on the forecast grid

1) Click **Modify... > Weekly total**.

   See the following figure.
2) Under **Specify how you want to change the weekly total**, specify how you want to modify Contacts Offered over the week:
   – Increase or decrease the weekly total of Contacts Offered by a specific number of contacts
   – Set the weekly total of Contacts Offered to a specific number of contacts
3) Under **Apply to totals**, specify if you want to modify the original values or the current grid values.
4) Click **Apply**.

Figure 94: Weekly total for Contacts Offered window



Performing forecasts

When you perform a forecast, you receive the required agents based on both the historical and current values. If you adjust any of the values in your historical data, you must perform the forecast again.

NOTE: It is recommended that you save your forecast as an Excel file to preserve your settings to use or compare with the next forecast you make.

To run a forecast

1) Specify the Service Level %, Service Level Time, Wrap Up Time, and Agent Efficiency % you expect for the queue or queue group.
2) Click **Perform forecast**.

   You can perform what-if scenarios on the historical data using different Service objectives statistics until you are satisfied with the forecast.

Exporting forecasts

After performing a forecast, you can export it as a Microsoft Excel spreadsheetor export the forecast to Workforce Scheduling.

Saving forecasts as Excel files

After you generate forecast data you can export it to a Microsoft Excel .xlsx worksheet. If your forecast has different media types, each media type will have its own worksheet in the .xlsx file.

To export a forecast as an Excel file

1) Click **Export Forecast**.
2) Click **Microsoft Excel**.

3) Click **Export**.

The forecast opens in a Microsoft Excel spreadsheet you can modify and save.

Exporting forecasts to Workforce Scheduling

If you are licensed for Workforce Scheduling, after you generate forecast data, you can export it into a Workforce Scheduling schedule.

When scheduling for agents who handle a particular media type, it is recommended that you export forecasts that use solely data from that media type. For example, if you are forecasting based on historical data from an email queue, the forecast should be exported into a Workforce Scheduling schedule that only handles email ACD interactions.

To export a forecast into a Workforce Scheduling schedule

1) Click **Export Forecast**.
2) Select **Workforce**.
3) For each media type, select the schedule for which to apply the forecast.

   NOTE: Each media type must be exported to a different schedule.
4) Click **Export**.

1.7. Flexible Reporting

Flexible Reporting enables you to create customized reports. Access to Flexible Reporting is determined by your security role.

With Flexible Reporting you can:

- Use a wizard interface to create customized reports with existing statistics (column headings)
- Create custom calculations using expressions
- Select column headings to build custom reports
- Select only the columns you want to view
- Select like data for two or more device types and combine them in one report
- Arrange the columns in the order in which you want to view them
- Customize the names of statistics (column headings) so they are meaningful to your department, business, and industry
- Save the reports in Excel and .pdf formats

NOTE:

- Flexible reporting supports a maximum of 256 columns per report.
- Security role settings are not supported in Flexible Reporting.

Using Flexible Reporting

In Flexible Reporting you can

- Create new reports
- Modify standard MiContact Center Business report templates
- Modify existing Flexible Reporting report templates
- Design reports
- Manage your Flexible Reporting reports
- Run reports

Starting Flexible Reporting

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

To start Flexible Reporting

1) Open **Flexible Reporting**.
2) If prompted, type your **Username** and **Password** and verify the **Enterprise Server** IP address.
3) If you use Secure Socket Layer, select **SSL**.
4) Optionally, select **Remember my credentials**.
5) Click **Login**.

   The Welcome to Flexible Reporting dialog box opens.
6) Select from: **Run a report**, **Create a new report**, **Redesign a standard report**, **Modify an existing report**, or **Do not show this dialog box again**.

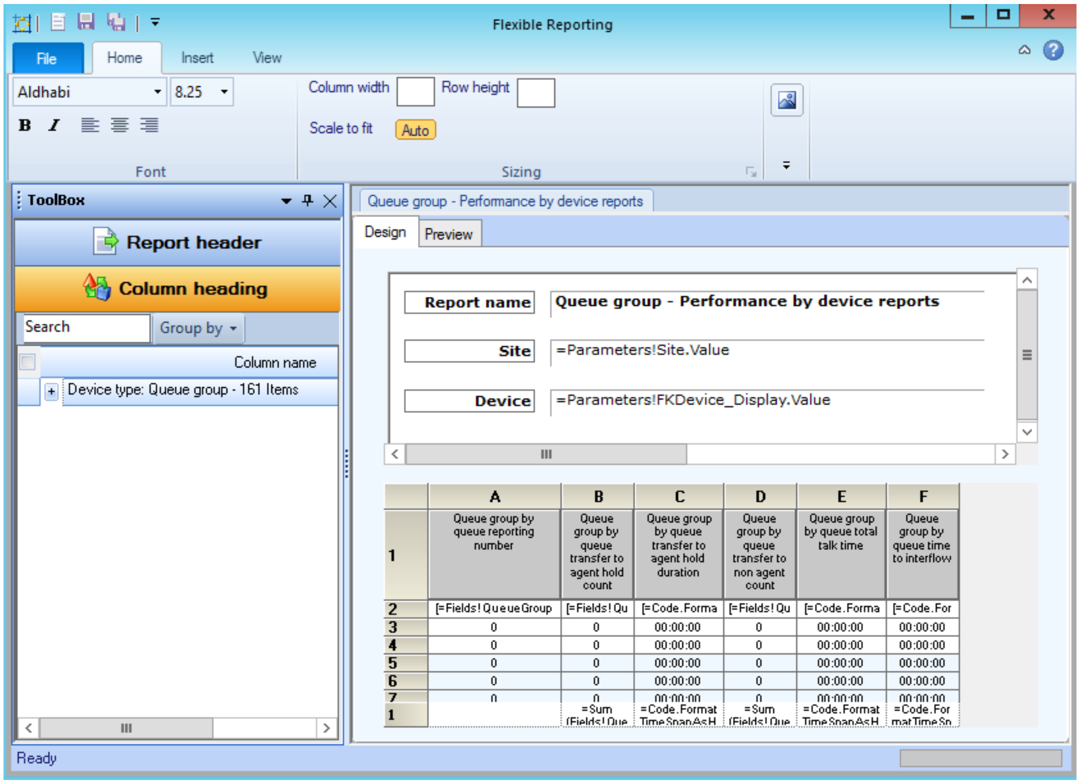
   NOTE: The Created Language column for existing reports displays your current language preference.
7) If you want to initiate a procedure, click **OK** and see the associated section in this chapter. Otherwise, close the dialog box.

Viewing the Flexible Reporting user interface

The Flexible Reporting user interface includes the following. (See the following figure.):

- Report Designer wizard
- Layout designer window
- Flexible Reporting button
- Ribbon
- Toolbox window

Figure 95: Flexible Reporting user interface



You can customize the position of the windows in the following ways:

- Dock to the left, right, top, or bottom of the user interface
- Float
- Hide
- Auto-hide

Report Designer wizard

Whether you are building a new report or modifying an existing report, the Report Designer wizard leads you through the following steps to select data for the report:

- Create a new report based on an existing one, or design a new report
- Select a report type
- Select the device types
- Select the statistics (column headings), and the order in which you want them displayed
- Specify the time frame options

Layout designer window

The layout designer window comprises two tabs: design and preview. The window displays the report header and data grid. You can perform the following functions in the layout designer window.

On the Design tab you can

- Add images to report headers

- Edit the report header titles
- Adjust the placement of the report header titles and values
- Remove report header titles and values
- Add existing or custom columns
- Move columns
- Delete columns
- Edit column heading names
- Specify column width and row height
- Specify row colors
- Freeze and unfreeze columns
- Save report templates

On the Preview tab you can

- Run and preview reports
- Save reports
- Export reports
- Print reports

The File tab

The File tab is a tab located in the upper left corner of the window. The following options are available from the Flexible Reporting button: New, Open, Save, Save As, Close, Feedback, About, Log Out, Exit, and Exit and Log Out.

Ribbon

The ribbon provides the same functionality as traditional toolbars. Use the tools on the ribbon to help you design your reports. The ribbon comprises the Home, Insert, and View tabs.

On the Home tab of the ribbon, you will find the tools to help you

- Change the font type, size, and style
- Select text justification
- Specify column width, auto-fit column width, and row height
- Change row colors

On the Insert tab of the ribbon, you will find the tools to help you

- Insert and remove images from the report header
- Select the report header titles to open in the report header
- Add existing or custom columns
- Remove columns
- Freeze and unfreeze columns
- View or modify expressions

On the View tab of the ribbon, you will find the tools to help you

- Show and hide the Toolbox window
- Manage reports

Toolbox window

The Toolbox window contains the following:

- **Report header**

  Report header is a list of report header titles that are currently not included in the report header. If the Report Header list is empty, all of the report header titles will be applied to the report. When report header titles are removed from a report they are shown in the Report headers list.
- **Column heading**

  Column heading displays a list of all of the column headings (for only those devices selected for the report) that are not currently included in the report grid. When you add a column heading to the report, it is removed from the list. Similarly, if you remove a column heading from the report, it displays in the Column headings list.

Creating new reports

Using the Report Designer wizard you can build new reports with existing column headings. Use the Report Designer wizard to select the data for the report.

NOTE: Reports generate in the language they were created in, regardless of the current employee language setting.

The Report Designer wizard guides you through the following steps:

- Select how you want to display the report data
- Select the device(s) on which you want to report
- Select the statistics (column headers) that will be shown in the report
- Select the time frames over which you want to run the report

To create a new report

1) Click **File > New** to launch the Report Designer wizard.
2) Click **Next**.
3) Click **Create a new report** and follow the steps in the wizard.

   At the end of the Report Designer wizard, the new report opens automatically on the Design tab.
4) Design the report.

   See "Designing reports".
5) Click **File > Save**.

Modifying standard MiContact Center Business report templates

Using the Report Designer wizard you can modify standard MiContact Center Business voice report templates. In the wizard, you can remove data (column headings) and add new data (additional devices and column headings).

You can modify the following standard reports in the Report Designer Wizard:

- Agent by Make Busy Code
- Agent Group by Make Busy Code
- Agent Group Performance by Period
- Agent Performance by Account Code
- Agent Performance by Period
- Agent Shift by Period
- DNIS Group Performance by Period
- DNIS Performance by Period
- Employee Group Performance by Employee
- Employee Performance by Agent ID
- Extension Group Performance by Period
- Extension Performance by Period
- Queue ANI by Area Code
- Queue Group Performance by Period
- Queue Group Performance by Queue
- Queue Performance by Account Code
- Queue Performance by Member
- Queue Performance by Period
- Trunk group Performance by Period

The Report Designer wizard guides you through the following steps:

- Select the report you want to modify from a list of standard MiContact Center Business reports
- Select the time frames over which you want to be able to run the report

  Choosing options on this page enables you to select time frames when submitting or previewing reports. The start and end times enable you to run the report for a specific time frame for each day in the report. For example, you can run the report for your hours of operation only, 8 A.M. to 6 P.M.

  The days of the week time frame enables you to run the report for specific days. For example, every Friday over the last two months.

To modify a standard MiContact Center Business report template

1) Click **File > New**.
2) Click **Next**.
3) Select the **Redesign a standard report** option and follow the steps in the wizard.

   At the end of the Report Designer wizard, the new report template opens automatically on the Design tab.

   NOTE: On the Select an existing report template page of the wizard, under Filter by device type, select All devices if you want to see all available reports for all devices.
4) Design the report.

   See "Designing reports".
5) Click **File > Save**.

Modifying existing Flexible Reporting report templates

To modify an existing Flexible Reporting report template

1) Click **File > Open**.

   The Reports List window opens, giving you access to all personal and shared Flexible Reporting reports.

2) Select the report you want to modify.
3) Click **Open**.

   NOTE:

   – If 'Do not show this dialog box again' was selected on the Welcome to Flexible Reporting dialog box, the report will open to whichever tab, Design or Preview, was open last.

   – Shared reports that have no owner will prompt you to optionally take ownership of the report when opened.

4) Modify the report.

   See "Designing reports".

5) Click **File > Save** to save the changes to the report template.

   *Click **File > Save As** to save the report as a new template.*

6) If you want to run the report, click the **Preview** tab.

Designing reports

Using the options available on the ribbon, design the report by modifying the report header, columns, and rows.

NOTE:

- You can open and edit report templates you previously created in Flexible Reporting.
- When right-clicking a column to bring up the column's context menu, do not right-click the column header cell. This is an editable field and will not bring up the column context menu.

Adding images to report headers

To add an image to a report header

1) On the **Insert** tab of the ribbon, click the Insert button.
2) Select an image file and click **Open**.

   The image displays on the report header.

3) Drag the image to where you want it to be shown on the report header.

Deleting images on report headers

To delete an image

1) Select an image on the report header.
2) On the **Insert** tab of the ribbon, click the **Remove** button.

Editing report header titles

Report headers comprise titles and values. Edit the report header titles to customize the look of your reports.

You can edit the font type, size, and style of report header titles.

You can edit the titles of the following report headers:

- Report
- Site
- Device
- Date range
- Date created
- Created by

  NOTE: You cannot edit the report header values as these are driven by the options selected when the report is submitted.

To edit a report header title

1) Click a report header title.
2) Edit the text in the box.

Moving report header titles and values

You can drag and drop report header titles and values independently.

To move a report header title or value

- Drag and drop the report header title or value to where you want it to be shown on the report header.

Removing report header titles and values

All report header titles and values are shown on a report when it is first created. If you remove a report header title, the corresponding value will also be removed from the header. For example, if you remove the Date range title, the date range will not be shown on the report.

To remove a report header title and value

- On the **Insert** tab of the ribbon, click the **Header** button and deselect the check box of the report header title you want to remove. You can optionally drag and drop the report header title from the report to the Report header list.

  Report header titles removed from the report are shown in the Report header list in the Toolbox window.

Adding report header titles and values

To add a report header title and value to a report

- On the **Insert** tab of the ribbon, click the **Header** button and select the check box of the report header title you want to add. You can optionally drag and drop the report header title from the Report header list to the report.

Adding existing columns

To add an existing column

1) On the **Insert** tab of the ribbon, click **Add > Existing**.

   Optionally, right-click the report and select Insert column > Existing from the drop-down list.

   The Add columns window opens.

   NOTE: You can also drag and drop items from the Column heading list in the Toolbox window to add existing columns to your report.

2) Select the columns you want to add to the report.
3) Click **OK**.

Adding custom columns

You can add custom columns to create custom calculations using expressions or blank columns. The ability to create custom calculations using expressions enables you to further customize report data to suit your specific business needs. Blank columns can be used as spacers to make reports easier to read, or as placeholders for importing third-party data after a Flexible Reporting report has been generated.

NOTE:

- Adding columns containing custom calculations requires a thorough understanding of Microsoft Excel and regular expressions.
- We recommend you preview reports containing custom calculations in Flexible Reporting before saving the changes and generating the report in CCMWeb.

To add a column containing custom calculations

1) On the **Insert** tab of the ribbon, click **Add > Custom**.

   Optionally, right-click the report and select Insert column > Custom from the drop-down list.

   A blank column displays in the report.

2) Right-click a cell in the blank column and select **Expression**.

   The Edit expression window opens.

   NOTE: You cannot create calculations using expressions in a header cell.

3) Select an option in the **Options** list to view the associated **Item** list.
4) Select an item in the **Item** list to view the associated item **Description** and expression **Example**.
5) Double-click the item in the **Item** list to insert its expression into the **Expression** box.
6) Repeat steps 3 to 5 until the complete calculation is entered in the **Expression** box and click **OK**.

   The expression displays in row two of the blank column in the report.

7) If you want to edit the expression you created, right-click the cell and select **Expression** to return to the Edit expression window.

After adding a column containing custom calculations you can choose to view or modify the expression.

To view or modify an expression

1) Select the cell in the report, for which you want to view or modify the expression.
2) On the **Insert** tab of the ribbon, click **Expression**.

Optionally, right-click the column and select Expression from the drop-down list.

The Edit expression window opens.

3) Select an option in the **Options** list to view the associated **Item** list.
4) Select an item in the **Item** list to view the associated item **Description** and **Expression** example.
5) Double-click the item in the **Item** list to insert its expression into the **Expression** box.
6) Repeat steps 3 to 5 until the complete calculation is entered in the **Expression** box and click **OK**.

   The expression displays in row two of the blank column in the report.

You can restrict the number of decimal places that will display for results. As an example, setting the number of decimal places that will display for the Average Manned Agent statistic is described below.

To set the number of decimal places that display for results

1) In the **Design** view, right-click the **Average Manned Agent** column in the report and select **Expression** from the drop-down list.
2) Change the current value of **=Fields!AgentGroupEventAvgMannedAgents.Value to =FormatNumber(Fields!AgentGroupEventAvgMannedAgents.Value,1)**.
3) Click **OK**.
4) Click **Save**.

   *The column is formatted to display one decimal place. To alter the number of decimal places displayed, enter the appropriate number in place of **1**.*

To add a blank column

1) On the **Insert** tab of the ribbon, click **Add > Custom**.

   Optionally, right-click the report and select Insert column > Custom from the drop-down list.

   A blank column displays in the report.
2) Optionally, click the header cell of the blank column and type a name for the column.

Moving columns

To move a column

- On the report grid, drag and drop the column to where you want it on the grid.

Deleting columns

NOTE: Some statistics require specific columns to ensure a report is meaningful. These statistics are associated with the required columns and cannot be deleted on their own. For example, in by period reports, you cannot delete the interval; in by device reports, the reporting number cannot be deleted.

To delete a column

1) Click a column on the report grid.
2) On the **Insert** tab of the ribbon, click the **Remove** button.

   Optionally, right-click the column and select Delete column from the drop-down list.

Editing column heading names

You can edit the names of column headings so they are meaningful to your department, business, and industry. You can change the font type, size, and style as well as edit the text.

To edit a column heading name

1) Click a column heading on the report grid.
2) On the **Home** tab of the ribbon, use the font options to change
   – the font type, size, and style
   – the justification
3) Optionally, edit the name of the column heading.
   If, after renaming a column heading, you want to see the original column heading name, hover over the column heading. The original column heading name displays after Name.

Specifying column width

To specify the column width

1) Click a column.
2) On the **Home** tab of the ribbon, after **Column width**, type the width (in pixels).
   Optionally, right-click the column and select Column width from the drop-down list.

To auto-fit the column width

1) Click a column.
2) On the **Home** tab of the ribbon, after **Scale to fit**, click **Auto**.
   Optionally, right-click the column and select Auto-fit Column width from the drop-down list.

Specifying row height

You can specify a different row height for the header row than the body rows.

To specify the header row height

1) Click the header row.
2) On the **Home** tab of the ribbon, after **Row height**, type the height (in pixels).

To specify the body row height

1) Click a body row.
2) On the **Home** tab of the ribbon, after **Row height**, type the height (in pixels).
   Optionally, right-click the body row and select Row height from the drop-down list.
   All of the body rows will be the same height.

Specifying row colors

You can alternate row colors to make report data easier to read.

1) On the **Home** tab of the ribbon, select the primary and alternate colors.
2) After **Alt row count**, type the number of rows for each color.

Freezing columns

Frozen columns remain stationary when you scroll to view columns to the right.

To freeze a column heading

1) On the report grid, click the column to the right of the ones you want to freeze.
2) On the **Insert** tab of the ribbon, click the **Freeze column** button.

   Optionally, right-click the column and select Freeze column from the drop-down list.

Unfreezing columns

To unfreeze a column heading

1) On the report grid, click the column to the left of the frozen column.
2) On the **Insert** tab of the ribbon, click the **Unfreeze column** button.

   Optionally, right-click the column and select Unfreeze column from the drop-down list.

Managing your Flexible Reporting reports

You manage your Flexible Reporting reports on the My Reports window. My Reports gives you access to all of the reports you have created.

You can access all the reports you have created and all shared reports created by others, by clicking the File > Open.

NOTE: Shared reports that have no owner will prompt you to optionally take ownership of the report when opened.

In the My Reports window you can

- Change access properties: Shared or not Shared
- Rename reports
- Delete reports

Changing access properties

To change the access properties of a report

1) On the **View** tab of the ribbon, click **My reports**.
2) Select the report(s).
3) If you want to share the report(s), under **Shared**, select the check box. Otherwise, clear the check box and the report(s) will be available to you only.
4) Click **OK**.

Renaming reports

To rename a report

1) On the **View** tab of the ribbon, click **My reports**.
2) Select a report and click **Rename**.
3) Edit the name.

4) Click **OK**.

Deleting reports

You can only delete the reports you create.

To delete a report

1) On the **View** tab of the ribbon, click **My reports**.

   NOTE: You cannot delete a report that is open in Flexible Reporting.

2) Select the report(s) you want to delete and click **Delete**.
3) Click **Yes** to delete the selected report(s).
4) Click **OK**.

Running Flexible Reports

You can run Flexible Reporting reports in CCMWeb or in Flexible Reporting. However, you can schedule reports in CCMWeb only.

From CCMWeb, you can run Flexible Reporting reports on demand, or schedule them, the same way you run standard reports.

In Flexible Reporting you can run, save, and print reports on the Preview tab. After you run a report, printing options enable you to view the print layout, and configure page setup and printer properties.

NOTE:

- Flexible Reporting will run reports only when there is data to generate the report.
- If you run a report on the Preview tab and the report data is all zeros, ensure you selected a device on which to run the report. If you selected a device, ensure the selected time period is one that would have incurred activity.
- Custom reports created in Flexible Reporting can only be generated in the language that was used when they were created and saved.

Running reports in CCMWeb

To run an on-demand report in CCMWeb

- Hover over Reporter, select Flexible Reporting, and run the report.

  You will have access to all Flexible Reporting reports created by you and shared Flexible Reporting reports created by others.

NOTE: When a report supports more than one device type, click on each tab to select the devices on which you want to report.

To schedule a report in CCMWeb

1) Hover over **Reporter** and select **Scheduled Reports**.
2) If you want to create a new schedule, click **Next**. Otherwise, select an existing schedule and click **Manage schedule properties**.
3) Configure the schedule properties and distribution attributes.
4) Click **Add a report**.

5) Click **Flexible Reporting** and select a report to add to the schedule.

Running reports in Flexible Reporting

To run reports in Flexible Reporting

1) On the **Preview** tab, under **Devices**, select the device(s).
2) Specify the date and time parameters.
3) Click **Run report**.

   Flexible Reporting generates the report and displays it in the preview pane.

Saving templates and reports

In Flexible Reporting you can save

- **Templates**

  The report templates you create in Flexible Reporting are saved on the Enterprise Server so you can run them from Flexible Reporting and CCMWeb.

  NOTE: Report templates are not saved automatically. You must save your report template before you exit Flexible Reporting if you want to use it to run reports or modify the template later.

- **Reports**

  After you run a report in Flexible Reporting, you can save the output (report) on your computer or elsewhere on your network. Reports can be saved or, optionally, exported in Excel (.xsl and .xslx), Word (.doc), or .pdf formats.

To save a report template as a new document

1) Click the **File > Save As**.
2) After **File name**, type the name of the new template.

   NOTE: Only you can run and view reports you have created and designated as not shared. Shared reports can be run and viewed by others.

3) If you want to allow others to run the report, select the **Shared** check box.
4) Click **Save**.

To save modifications to a report template

- Click **File > Save**.

To export a report in Excel (.xsl or .xslx) format

- In the Preview window, above the generated report, click the **Save** button, select **Excel**, and specify the location to save the report in Excel (.xsl) format.

  *Optionally, in the **View** tab of the ribbon, click the **Export report** button, select **Excel** (.xsl) or **Excel 2007** (.xslx) and specify the location to save the report in an Excel format.*

To export a report in Word (.doc) format

- In the Preview window, above the generated report, click the **Save** button, select **Word**, and specify the location to save the report in Word (.doc) format.

To export a report in .pdf format

- In the Preview window, above the generated report, click the **Save** button, select **PDF**, and specify the location to save the report in .pdf format.

  *Optionally, click the **Export report** button on the View tab of the ribbon, and select **PDF**, and specify the location to save the report in .pdf format.*

Printing reports

To print a report you ran on the Preview tab

- On the Preview window toolbar, click the **Print** button.

1.8. Workforce Scheduling

Workforce Scheduling is an optional application that enables you to create employee schedules. Using historical data, Workforce Scheduling forecasts the number of employees required to meet your contact center's Service Level objectives.

NOTE: Access to Workforce Scheduling features is dependent on your administrative-set security role.

Using Workforce Scheduling in conjunction with MiContact Center Business, you can

- Customize schedules
- Forecast scheduling requirements
- Match an employee’s skills to those skills required for jobs in each schedule
- View the distribution of employees across each schedule
- Print schedule reports

There are two optional applications that work in conjunction with Workforce Scheduling: Schedule Adherence and Employee Portal. For more information on these applications, see "Schedule Adherence" and *"Employee Portal"*.

Understanding Workforce Scheduling

Before you start using Workforce Scheduling read the following sections on how to

- View the Workforce Scheduling user interface
- Understand forecasting concepts
- Understand the Workforce Scheduling process

Viewing the Workforce Scheduling user interface

The following figure displays scheduling information, such as the employees who are scheduled, employee shift start and end times, the time interval shift totals, and the shift details for each employee.

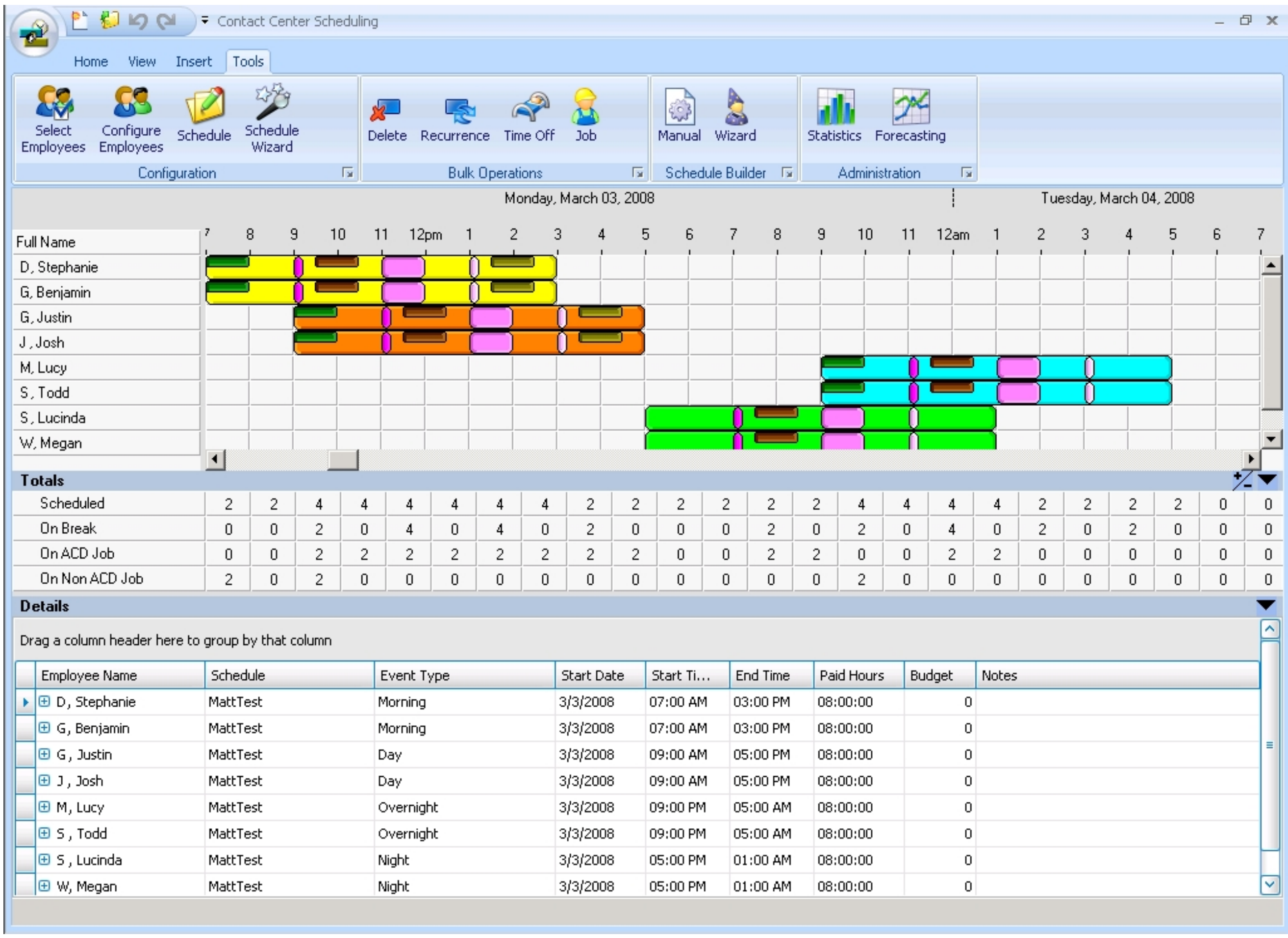
NOTE: The Scheduling and Forecasting buttons in the Tools>Administration window are used to toggle between these two views.

The Workforce Scheduling user interface is comprised of the following panes:

- People pane

- Time bar pane
- Totals pane
- Schedule details pane

Figure 96: Scheduler window



People pane

The people pane is located in the upper-left portion of the scheduler window. The people pane lists the employees included in the schedules you are viewing. (See the following figure.)

Figure 97: People pane

Full Name
A, Awil
C, Mike
D, Abdallah
G, Dave
M, Ghislain
M, Trevor

Time bar pane

The time bar pane is located in the upper-right portion of the scheduler window. The time bar pane displays a time bar for each scheduled employee. Time bars display the shifts, breaks, jobs, time off, and unavailable periods for employees listed in the people pane. You can view the time bar pane in the following time intervals: 6 hours, 12 hours, 1 day, 2 days, 1 week, 2 weeks, and 1 month. (See the following figure.)

You can view previous or upcoming dates using the horizontal scroll bar under the time bar pane. If you reach the end of the month and want to view dates for the next month, you can click the arrow on the scroll bar to load the schedule for the next month (as indicated by the red square in the following image).

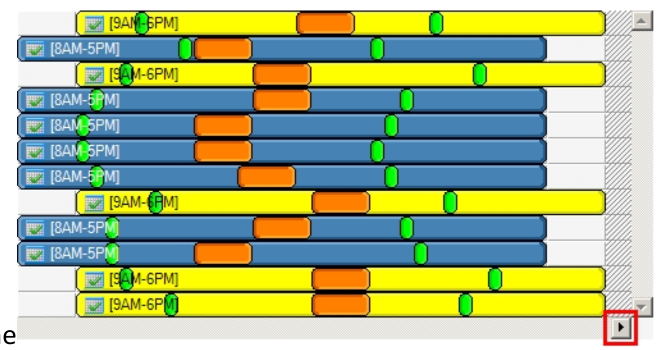


Figure 98: Time bar pane

Totals pane

The totals pane appears when you select event totals to view. The totals pane is located in the center of the scheduler window. Each value represents the total number of employees scheduled for an event. (See the following figure.)

Figure 99: Totals pane

Totals														
Scheduled	0	0	0	0	0	0	0	0	5	5	5	5	5	4
On Break	0	0	0	0	0	0	0	0	0	0	0	0	0	0
On ACD Job	0	0	0	0	0	0	0	0	0	0	0	0	0	0
On Non ACD Job	0	0	0	0	0	0	0	0	0	0	0	0	0	0
At Work	0	0	0	0	0	0	0	0	5	5	5	5	5	4
Over/Under	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Overtime	0	0	0	0	0	0	0	0	0	0	0	0	0	0

You can view the following event totals:

Forecasted

The *Forecasted* total displays after you apply a forecast to the schedule. This total represents the forecasted number of employees required to handle interaction requests and meet the Service Level objectives you specify. You can optionally adjust the Forecasted total in the totals pane. See "Modifying forecast totals in the event totals pane".

NOTE: When the user sets View to greater than 6 hours, each cell value in the Totals View is the maximum value of the composite 15-minute values. The Over/Under value displayed is also the maximum of the composite values. As a result, in this view, the displayed value for the Over/Under does not align with the value that would be obtained from adding the At Work and forecasted values.

Scheduled

The *Scheduled* total represents the number of employees scheduled for the time you are viewing.

On break

The *On break* total represents the number of employees scheduled for a break at a specific time.

On ACD Job

The *On ACD Job* total represents the number of employees scheduled to perform ACD work.

On Non ACD Job

The *On Non ACD Job* total represents the number of employees scheduled to perform Non ACD work.

At work

The *At work* total represents the number of employees scheduled to handle interaction requests.

Over/Under

The *Over/Under* total represents the difference between the number of employees at work compared to the number of employees forecasted. A value of 4 means 4 additional employees are working compared to the forecasted requirement. A value of (4) means 4 fewer employees are working compared to the forecasted requirement. When you book annual leave for employees, you can preview the result on shift coverage by using the over / under function, before updating changes.

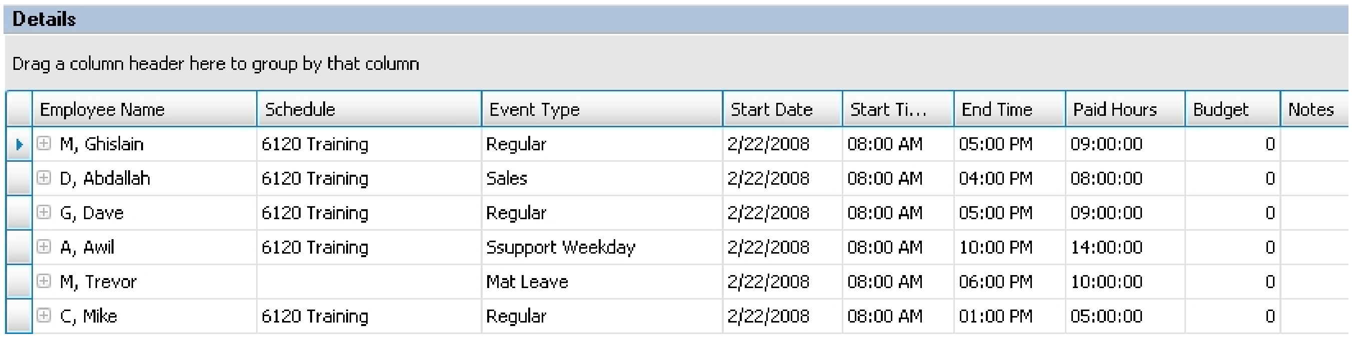
Overtime

The *Overtime* total represents the number of employees scheduled to perform overtime work.

Schedule details pane

The schedule details pane is located at the bottom of the scheduler window. It displays details on scheduled employees. You can modify the start and end times of scheduled events in the schedule details pane. For example, you can adjust the length of a scheduled break. See *"Modifying event times and notes in the schedule details pane"*. (See the following figure.)

Figure 100: Schedule details pane



Details

Drag a column header here to group by that column

Employee Name	Schedule	Event Type	Start Date	Start Ti...	End Time	Paid Hours	Budget	Notes
M, Ghislain	6120 Training	Regular	2/22/2008	08:00 AM	05:00 PM	09:00:00	0	
D, Abdallah	6120 Training	Sales	2/22/2008	08:00 AM	04:00 PM	08:00:00	0	
G, Dave	6120 Training	Regular	2/22/2008	08:00 AM	05:00 PM	09:00:00	0	
A, Awil	6120 Training	Ssupport Weekday	2/22/2008	08:00 AM	10:00 PM	14:00:00	0	
M, Trevor		Mat Leave	2/22/2008	08:00 AM	06:00 PM	10:00:00	0	
C, Mike	6120 Training	Regular	2/22/2008	08:00 AM	01:00 PM	05:00:00	0	

You can sort the information in the schedule details pane by organizing the headings. The schedule details column headings are as follows:

- **Employee name**—the employee to which the specified time event is scheduled
- **Schedule**—the schedule to which the specified time event is scheduled
- **Event type**—the events to which the specified time event is scheduled
- **Start date**—the start date of each scheduled event. You can modify this parameter in the schedule details pane. Changes are immediately reflected in the time bar pane
- **Start time**—the start time of each scheduled event. You can modify this parameter in the schedule details pane. Changes are immediately reflected in the time bar pane
- **End time**—the end time of each scheduled event. You can modify this parameter in the schedule details pane. Changes are immediately reflected in the time bar pane
- **Paid hours**—the total number of paid hours for the scheduled shift
- **Budget**—the total cost of the scheduled shift
- **Notes**—the notes on scheduled events you enter in this field

Understanding forecasting concepts

Workforce Scheduling assists you in scheduling employees for work and holiday periods. It offers an integrated forecasting component that uses historical data to partially automate the scheduling process. Scheduling is not entirely automated. You may have to modify employee schedules and enter shift and employee variables manually after creating a schedule based on forecasted data.

You schedule employees so the number of incoming calls at any given time typically exceeds the number of employees currently available. This ensures callers experience a slight delay before employees answer their calls. The expected number of incoming calls forecasted for the time of day and day of the week influence scheduling decisions when trying to find the right balance between call volume and available staff.

For information on accessing historical data to assist when making schedules, see *"Expecting forecasts to workforce scheduling"*.

For information on forecasting variables and how to improve forecasting accuracy, see *"Step#3 Forecast the Call Load"*.

For information on Service Level variables and how to calculate the Service Level Percent, see *"Understanding the Service Level"*.

Understanding the Workforce Scheduling process

Employees, agent IDs, agent groups, queues, queue groups, overtime types, time off types, holidays, and skills are configured by the System Administrator in YourSite Explorer. After these devices are configured, you must decide if you will use forecasted data to build your schedules. When you build a schedule in Workforce Scheduling using forecasted data, we recommend you associate the schedule with the queue group you will use to perform the forecast. You must ensure that the employees you want to schedule are associated with the queue group you associate to the schedule. You can optionally associate a schedule to a queue group with different employees, which can be useful for scheduling a new group of employees based on the forecasted data of other employees.

As soon as you start Workforce Scheduling, you can begin creating your schedules. After you log in, you are asked to create or select a schedule. You create a schedule by assigning it a name. If you are using a forecast to build the schedule, you associate the schedule with a queue group.

After you create the schedule, you configure schedule parameters, such as shifts, breaks, jobs, and scheduling preferences/options for each employee.

You can automate the schedule building process with the Schedule Builder tool. It helps you quickly build a schedule, with or without a forecast. If you build schedules using forecasted data, we recommend you use Schedule Builder. Alternately, you can build a schedule manually. This involves inserting or removing events (shifts, breaks, jobs, time off, unavailable periods) and making events recur. You can manually build a schedule based on forecast totals in the Totals pane. After you build a schedule using Schedule Builder, you may need to make a few adjustments.

Workforce Scheduling and your contact center

Using Workforce Scheduling, you can schedule your employees to best suit your contact center needs. You can

- Customize schedules for your contact center groups
- Forecast scheduling requirements
- Match employee skills to the skills required for each schedule
- View the distribution of employees across schedules
- Print schedule reports

For information on scheduling considerations, and how to calculate the Shrinkage Factor and optimize scheduling, see *"Step #5 Schedule agents"*.

Using Workforce Scheduling, you can create schedules for your contact center using a variety of options. Depending on your contact center, some options may be more suitable than others. To help your company use Workforce Scheduling most effectively, we have created configuration scenarios that describe how to implement Workforce Scheduling, based on the type of scheduling used in your contact center.

Each Workforce Scheduling configuration scenario provides a description of the scheduling method and an example of contact centers that typically use that method. Each scenario also provides some tips on how to configure Workforce Scheduling for each style of scheduling. The scenarios include the following scheduling configurations:

- Assigned shift
- Availability
- Rotational
- Forecast

Assigned shift-based scheduling configuration scenario

The assigned shift scheduling method uses fixed shifts staffed by employees who are permanently assigned to specific shifts. Contact centers that use assigned shift scheduling have consistent call volumes. Employees are primarily full-time staff and are guaranteed a specific number of hours of employment per week. Typically, you plan a schedule three to six months in advance with assigned shift scheduling.

Contact centers ideal for assigned shift scheduling

Assigned shift scheduling is best suited to contact centers that have a steady and predictable call volume, such as a contact center that runs a conventional nine to five operations. Examples of contact centers that use assigned shift scheduling include banks and government offices.

To configure Workforce Scheduling for an assigned shift scheduling environment

- Create fixed shifts
- Use shift names that describe a shift's purpose, such as '9 to 5 shift' or '1st shift'
- Use mass recurrence to repeat scheduled events for multiple weeks
- Configure employee hours using shift assignment by day of week

Availability-based scheduling configuration scenario

The availability scheduling method uses fixed shifts, but unlike assigned shift scheduling, the employees that work a given shift are not permanently attached to that shift. Contact centers that use availability scheduling fill shifts using a pool of employees.

A contact center supervisor sets staff availability based on day of week and time of day. When staffing a shift, the supervisor can assign any employee who is listed as available for that date and time to the shift. Typically, you plan a schedule two to four weeks in advance when you use availability scheduling.

Contact centers ideal for availability scheduling

Availability scheduling is best suited to contact centers driven by shifts, such as hotels or companies that focus on catalog sales. These contact centers have a specific number of shifts that can be filled by any qualified employees who are available. This type of schedule is frequently used with contact centers that operate 24/7.

To configure Workforce Scheduling for an availability scheduling environment

- Primarily use fixed shifts, but do not assign employees to specific shifts
- Assign employees all of the possible shifts they can work
- Set employee availability by day of week and time of day
- Use filters to assign the best employee available for a shift, based on skill set, seniority, or personal priority number

Rotational-based scheduling configuration scenario

The rotational scheduling method consists of two or more unique schedules that recur at defined intervals. For example, if a contact center rotates four schedules, the week one schedule repeats in week five, week nine, and so on. The rotational scheduling method enables contact center schedules to be consistent in the long-term, while allowing shifts to vary from week to week.

Contact centers ideal for rotational scheduling

Rotational scheduling is best suited to contact centers that require specific employees to cover unique periods of time, such as medical clinics that are open on weekends. If each contact center employee is required to work one weekend a month, a rotational schedule can ensure an even distribution of weekend work for each employee.

To configure Workforce Scheduling for a rotational scheduling environment

- Primarily use assigned shifts with defined employees. The staff changes from one schedule rotation to the next ensure fair coverage on nights, weekends, and holidays
- Recur the shifts multiple times based on the number of rotations
- Manually track and adjust which employees are assigned to each rotation; Workforce Scheduling does not create a balanced schedule so you will need to make changes if you want to ensure the schedule is fair
- Optionally use rotational scheduling in conjunction with other schedule types. For example, create a schedule that uses the assigned shift method to cover Monday to Friday shifts and a second schedule that uses the rotational shift method to cover shifts such as weekends or holidays

Forecast-based scheduling configuration scenario

The forecast scheduling method references historical data to create schedules. Contact centers that use forecast scheduling have call volumes that can change considerably over relatively short periods of time, resulting in inconsistent scheduling.

Forecast scheduling provides more flexibility than other scheduling methods since shifts are not defined. A contact center that uses forecast scheduling does not have a fixed staff or fixed hours, as both change based on the expected call volume. Typically, you plan a schedule one to two weeks in advance with forecast scheduling.

Contact centers ideal for forecast scheduling

Forecast scheduling is best suited to contact centers driven by call volume, such as companies that focus on sales campaigns, promotions, or seasonal sales.

To configure Workforce Scheduling for a forecast scheduling environment

- Generate historical data specific to the type of event you are scheduling (for example, to create a schedule for a winter sales campaign, use historical data from a previous winter campaign)
- Create shifts with flexible start and end times to provide Schedule Builder with the greatest number of options when populating the shifts with employees
- Remember that shift variables, such as start/end times and breaks, will vary for employees on a day-to-day basis
- Due to the variety of shift start and end times, create breaks based on the Time to qualify variable
- Do not configure availability or shift assignment

Selecting a scheduling method

You can build schedules in Workforce Scheduling:

- Using a forecast
- Manually

The setup you require depends on the scheduling method you choose. If you incorporate forecast data when you build a schedule, you must build the schedule using Schedule Builder.

Scheduling using forecast data

When you use forecast data to build a schedule, you can apply historical data from any queue or queue group to the schedule. It is recommended to use historical data from the queue group with which the schedule is associated. Forecast data is simply the number of required agents. It can be used in schedules which are not associated with a queue or queue group.

Before you build a schedule using a forecast, as a best practice, we recommend you associate your schedule with a queue group. You should also ensure that the employees to be scheduled are associated with this queue group.

Ensure your System Administrator

1) Associates the agent IDs with an agent group.
2) Associates the agent group with a queue.
3) Associates the queue with the queue group (that you will associate with the schedule).

   Instructions for configuration and association of agents, agent groups, queues, and queue groups are located in the MiContact Center Business Installation and Administration Guide .

Scheduling manually

You have the most flexibility when you build a schedule manually. However, this can be time consuming if you must schedule a large number of employees or if you must create a schedule covering a long time period where shift assignments do not recur. You can also use manual scheduling to tweak schedules you build with Schedule Builder. See *"Creating and adjusting schedules manually"*.

Schedule setup and customization

In order to build a schedule in Workforce Scheduling, whether you build your schedule with forecasting or you build it manually, you must perform the following tasks to set up and customize your schedule:

1) Start Workforce Scheduling.
2) Configure schedule options.
3) Configure shifts, breaks, and jobs.
4) Assign shifts to schedules.
5) Assign shifts to employees.
6) Specify scheduling preferences/options for each employee in the schedule.
7) Specify schedule warnings.

Starting Workforce Scheduling on a client computer

To log on to Workforce Scheduling

1) Open **Workforce Scheduling**.

   The Login window appears.
2) If prompted, type your **Username** and **Password** and verify the Enterprise Server IP address.
3) If you use Secure Socket Layer, select **SSL**.
4) Optionally, select **Remember my credentials**.
5) Click **Login**.

   The first time you log on, or if you have not created any schedules, the scheduler window displays. See "Configuring schedule options".

   Otherwise, if schedules exist, the Load schedule window displays.

   See "Loading schedules".

Configuring schedule options

NOTE:

- If you associate a schedule with a queue group, only those employees included in the selected queue group can be configured in the schedule. (Agents are members of agent groups, which are associated with queues that are members of queue groups.)
- If you do not associate a schedule with a queue group, you can schedule any employee whose profile enables you to schedule them in Workforce Scheduling.

Before you can build a schedule, either manually or using Schedule Builder, you must create a new schedule.

On the New Schedule window, you must:

- Name the schedule
- Associate the schedule with a queue or queue group (optional)
- Add employees to the schedule
- Configure business hours for the schedule

- Activate/Deactivate the schedule

You can create new schedules and configure all Workforce Scheduling options using the Schedule wizard. Optionally, use the Schedule tool to add, delete, rename, and activate/deactivate schedules. Within the Schedule configuration window, you can click Apply at any time to apply changes to the schedule without closing the Schedule configuration window.

Configuring scheduling options using the Schedule wizard

You can create new schedules and configure all Workforce Scheduling options using the Schedule wizard.

To configure scheduling options using the Schedule wizard

1) Click the **Configuration** tab.
2) In the **Schedules group**, click **Schedule wizard**.
3) Follow the steps in the Schedule wizard to configure schedules, business hours, employees, fixed/variable shifts, fixed/variable breaks and jobs, and fixed/variable shift assignments.
4) Click **Finish**.

Creating schedules

To create a schedule

1) On the Application menu or ribbon, click **New schedule**.
2) After **Schedule name**, type a name for the schedule.
3) Under **Employee association**, select either **All employees**, **Employees associated with this queue group only**, or **Employees associated with this queue only**.
   – If you select Employees associated with this queue group, select a queue group from the list.
   – If you select Employees associated with this queue, select a queue from the list.
4) If this schedule will be an active schedule, select the **This schedule is active** check box. Otherwise, select the **This schedule is used for planning purposes only** check box.
5) Click **OK**.
6) Select the check boxes of the employees to add to the schedule.
7) Click **OK**.

Adding employees to schedules

Schedules that contain fewer than 100 employees are easiest to manage. Each employee should belong to one active schedule only. However, if employees belong to more than one schedule, you can still view the shifts for which they are scheduled.

To add an employee to a schedule

1) Click the **Configuration** tab.
2) In the **Schedules group**, click **Select employees**.
3) After **Schedule**, select a schedule.
4) If you want to group employees in the list by supervisor, select the **Group by supervisor** check box.
5) Select the check boxes of the employees to add to the schedule.

6) Click **OK**.

Configuring business hours for schedules

You can specify different business hours for each schedule. By default, you are warned if you try to schedule shifts outside business hours.

To configure the business hours of a schedule

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, select **Schedules**.
4) Under **Schedules**, select the schedule to modify.
5) After **First day of the schedule week**, specify the day that the schedule will begin.
6) After **Annual calendar start date**, specify the date the calendar year begins.

   The information in this field is used to calculate annual minimum and maximum hours for employees. January 1st is the default date.
7) Specify business hours for the schedule.
   – If you want to schedule employees 24 hours a day, seven days a week, under Business hours, click **Open 24/7**.
   – After **Open**, select the check boxes of the days of the week to schedule.
   – After **From**, specify the start times for each day of the week to schedule.
   – After **To**, specify the end times for each day of the week to schedule.
8) Click **OK**.

Renaming schedules

You can rename a schedule without losing any information associated with the schedule.

To rename a schedule

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) Under **Schedules**, select the schedule to rename.
4) Click **Rename**.
5) After **Name**, type a new name for the schedule.
6) Click **Rename**.
7) Click **OK**.

Deleting schedules

CAUTION: Deleting a schedule deletes all of the information associated with that schedule. This cannot be undone.

To delete a schedule

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) Under **Schedules**, select the schedule to delete.
4) Click **Delete**.
5) Click **Yes**.
6) Click **OK**.

Configuring shifts

A shift represents work hours on a given day for an employee. You can assign shifts to specific employees for any day of the week. You can create several shifts for one or more schedules. There are two types of shifts: fixed shifts and variable shifts. Fixed shifts have a fixed start time and duration. Variable shifts are based on the following shift variables:

Typical hours—the number of work hours for the shift

Minimum hours—the minimum number of hours for the shift

Maximum hours—the maximum number of hours for the shift

Minimum start—the time of day after which the shift must start

Maximum start—the time of day by which the shift must start

Color—the color in which the shift appears in the time bar pane.

You configure the following shift options using the Schedule tool:

- Add fixed shifts
- Add variable shifts
- Rename shifts
- Delete shifts

Adding fixed shifts

To add a fixed shift

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Shifts**.
4) In the right pane, click the **Fixed Shifts** tab.
5) In the right pane, click **Add**.
6) After **Name**, type a name for the fixed shift.
7) Click **Create**.
8) Under **Start time**, type the start time of the fixed shift.
9) Under **Duration**, type the duration of the fixed shift.
10) Under **Color**, select a color for the fixed shift.

11) Click **OK**.

Adding variable shifts

To add a variable shift

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Shifts**.
4) In the right pane, click the **Variable Shifts** tab.
5) In the right pane, click **Add**.
6) After **Name**, type a name for the variable shift.
7) Click **Create**.
8) Under **Minimum hours**, type the minimum number of hours in a day you can schedule the shift.
9) Under **Typical hours**, type the typical number of hours in a day you can schedule the shift.
10) Under **Maximum hours**, type the maximum number of hours in a day you can schedule the shift.
11) Under **Minimum start**, type the time of day after which the shift must start.
12) Under **Maximum start**, type the time of day by which the shift must start.
13) Under **Color**, select a color for the variable shift.
14) Click **OK**.

Renaming shifts

You can rename fixed/variable shifts without losing any information associated with the shifts.

To rename a shift

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) Click the **Shifts** tab.
4) If you want to rename a fixed shift, click the **Fixed shifts** tab. Otherwise, to rename a variable shift, click the **Variable shifts** tab.
5) Under **Name**, click the name of the shift to rename.
6) Type a new name for the shift.
7) Click **OK**.

Deleting shifts

CAUTION: Deleting a shift deletes all of the instances of that shift, including those inserted in schedules.

To delete a shift

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) Click the **Shifts** tab.

4) If you want to delete a fixed shift, click the **Fixed shifts** tab. Otherwise, to delete a variable shift, click the **Variable shifts** tab.
5) Under **Name**, select the shift to delete.
6) Click **Delete**.
7) Click **Yes**.

Configuring breaks

You configure the following break options using the Schedule tool:

- Add fixed breaks
- Add variable breaks
- Rename breaks
- Delete breaks

Examples of common breaks are morning break, lunch, afternoon break, and dinner break.

Adding fixed breaks

To add a fixed break

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Breaks**.
4) In the right pane, click the **Fixed Breaks** tab.
5) Click **Add**.
6) After **Name**, type a name for the break.
7) Click **Create**.
8) If the break is a paid break, enable the check box under **Is paid**.
9) Under **Time into Shift**, type the time from the beginning of the shift at which the break must start.
10) Under **Duration**, type the amount of time allotted for the break.
11) Under **Color**, select a color for the break.
12) Click **Ok**.

Adding variable breaks

To add a variable break

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Breaks**.
4) In the right pane, click the **Variable Breaks** tab.
5) Click **Add**.
6) After **Name**, type a name for the variable break.
7) Click **Create**.

8) Under **Duration**, type the amount of time allotted for the break.
9) If the break is a paid break, select the check box under **Paid**.
10) Under **Time to qualify**, type the minimum duration of a shift before you can schedule the break.
11) Under **Must start time into shift**, type the amount of time from the beginning of the shift that employees must work before they are entitled to the break.
12) Under **Must end time into shift**, type the amount of time from the beginning of the shift by which employees must complete the break.
13) Under **Minimum time** before end of shift, type the amount of time before the end of the shift that the break must end.
14) Under **Color**, select a color for the shift.
15) Click **OK**.

Renaming breaks

You can rename a break without losing any information associated with the break.

To rename a break

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Breaks**.
4) If you want to rename a fixed break, in the left pane, click the **Fixed Breaks** tab. Otherwise, to rename a variable break, click the **Variable Breaks** tab.
5) Under **Name**, click the name of the break to rename.
6) Type a new name for the break.
7) Click **OK**.

Deleting breaks

CAUTION: Deleting a break deletes all of the instances of the break, including those inserted in schedules.

To delete a break

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) If you want to delete a fixed break, in the left pane, click **Fixed shifts**. Otherwise, to delete a variable break, click **Variable shifts**.
4) Click the **Breaks** tab.
5) Under **Name**, select the name of the break to delete.
6) Click **Delete**.
7) Click **Yes**.
8) Click **OK**.

Configuring jobs

Use jobs in a schedule to differentiate the Non ACD tasks that employees perform. You create jobs for a specific shift. If the job requires a specific set of skills, you can associate skills to jobs. After you associate skills to jobs, you can compare the skill (and skill level) of the employees to the skill required to perform a job. This will ensure the employees you schedule have the appropriate skills for their assigned jobs.

You configure the following job options using the Schedule tool:

- Add fixed jobs
- Add variable jobs
- Rename jobs
- Delete jobs

Adding fixed jobs

To add a job for a fixed shift

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Jobs**.
4) In the right pane, click the **Fixed Jobs** tab.
5) Click **Add**.
6) After **Name**, type the name of the job.
7) Click **Create**.
8) If the job involves work on ACD calls, ensure the check box under **Is ACD** is selected.
9) Under **Time into Shift**, type the time from the beginning of the shift at which the job must start
10) Under **Duration**, type the duration of the job.
11) Under **Color**, select a color for the job.
12) Click **OK**.

Adding variable jobs

To add a job for a variable shift

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Jobs**.
4) In the right pane, click the **Variable Jobs** tab.
5) Click **Add**.
6) After **Name**, type the name of the job.
7) Click **Create**.
8) If the job involves work on ACD calls, ensure the check box under **Is ACD** is selected.
9) Under **Color**, select a color for the job.
10) Click **OK**.

Renaming jobs

You can rename a job without losing any information associated with the job.

To rename a job

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Jobs**.
4) If you want to rename a fixed job, click the **Fixed Jobs**. Otherwise, to rename a variable job, click the **Variable Jobs** tab.
5) Under **Name**, click the name of the job to rename.
6) Type a new name for the job.
7) Click **OK**.

Deleting jobs

CAUTION: Deleting a job deletes all of the instances of the job, including where it is inserted in schedules.

To delete a job

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Jobs**.
4) If you want to delete a fixed job, click the **Fixed Jobs**. Otherwise, to delete a variable job, click the **Variable Jobs** tab.
5) Under **Name**, select the name of the job to delete.
6) Click **Delete**.
7) Click **Yes**.

Adding breaks or jobs to shifts

To add a break or a job to a shift

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) Click **Assignments**.
4) In the right pane, click the **Breaks and Jobs** tab.
5) Under **Shifts**, select the shift for which you will add shifts to.
6) Under **Breaks**, select the break to add to a shift.
7) Click **>** to assign the break to the shift.
8) Under **Jobs**, select the job to add to a shift.
9) Click **>** to assign the job to the shift.
10) Click **OK**.

Removing breaks and jobs from shifts

To remove a break or a job from a shift

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) Click **Assignments**.
4) In the right pane, click the **Breaks and Jobs** tab.
5) Under **Shifts**, select the shift for which you will remove breaks/jobs from.
6) Under **Breaks**, select the break to remove from the shift.
7) Click **<** to remove the break from the shift.
8) Under **Jobs**, select the job to remove from the shift.
9) Click **<** to remove the job from the shift.
10) Repeat steps 5-9 to remove additional breaks and/or jobs from shifts.
11) Click **OK**.

Assigning shifts to schedules

NOTE: Schedule Builder uses the shifts you assign, combined with the employees' availability and shift assignment, to schedule shifts (or variations of them).

To assign shifts to schedules

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Schedule**.
3) In the left pane, click **Assignments**.
4) In the right pane, click the **Shifts** tab.
5) Under **Schedules**, select the schedule to which you will add shifts.
6) Under **Fixed Shifts**, select the fixed shift to add to the schedule.
7) Click **>** to assign the shift to the schedule.
8) Under **Variable Shifts**, select the variable shift to add to the schedule.
9) Click **>** to assign the shift to the schedule.
10) Repeat steps 6-9 for each shift you want to add to a schedule.
11) Click **OK**.

Assigning shifts to employees

To assign a shift to an employee

1) Click the **Configuration** tab.
2) In the **Schedules** group, click **Configure employees**.
3) In the left pane, under **Schedules**, select the schedule containing the employee(s) to which you will assign shifts.
4) Under **Employees**, select the employee to which you will add shifts.
5) Under **Shift Assignment**, select the check boxes of the shifts that will be available to this employee.

6) Repeat steps 4-6 for each employee to which you will assign shifts.
7) Click **OK**.

Configuring event display preferences

To make events easy to identify at a glance, you can specify how you want to display the scheduled events.

You can specify the following event display preferences:

- **Time bar content display—** provides descriptions, notes, or icons for scheduled events in the time bar pane
- **Smallest scheduling interval—** the smallest increment with which you insert events into the time bar pane
- **Default shift color—** the color for all of the shifts in the time bar pane. To override the default shift color, see *"Configuring shifts"*.
- **Default break color—** the color for all of the breaks in the time bar pane. To override the default break color, see *"Renamig breaks"*.
- **Default job color—** the color for all of the jobs in the time bar pane. To override the default job color, see *"Configuring jobs"*.
- **Default time off color—** the color for all of the time off types in the time bar pane. Your System Administrator is responsible for setting and changing the default time-off color.
- **Unavailable color—** the color for unavailable periods in the time bar pane
- **Tool tip display—** provides event information in tool tips on the time bar pane. The tool tip appears as a series of brackets depending on the information criteria you select
- **Time display—** the time format of the time bar pane. For example, 3 o'clock in the afternoon appears as 3 P.M. if you select *12 Hours*, or 15 if you select *24 Hours*

Configuring the time bar display

You can select from the following three time bar display options:

- **Icon—** refers to the icons of the scheduled shifts, time off events, and unavailable periods in the time bar pane
- **Type name—** refers to the names of the scheduled jobs in the time bar pane
- **Type notes—** refers to the notes of the scheduled jobs in the time bar pane

To specify how events display in the time bar

1) On the application menu, click **Preferences**.
2) Click the **Display** tab.
3) Under **Time bar content**, select the time bar content to display for Shifts, Jobs, Breaks, Time off, and Unavailable periods.
4) Click **OK** to save and close the Preferences window.

Configuring the smallest scheduling time interval

By default, events are snapped to the time bar grid in 30 minute increments. However, you can adjust the snap-to-grid interval to 5, 15, 30, or 60 minutes. Set the smallest scheduling time interval to the minimum number of minutes you want to insert events into a schedule. For example, if you select 15 minutes as the smallest scheduling interval, you cannot insert events for an employee in increments smaller than 15 minutes.

The default scheduling interval is 15 minutes, which we recommend, as changing this to a smaller interval will increase the amount of time it takes for Schedule Builder to build schedules.

To configure the smallest scheduling time interval

1) On the application menu, click **Preferences**.
2) Click the **General** tab.
3) Under **Scheduling preferences**, after **Smallest scheduling interval**, select the snap-to-grid time interval.
4) If you want to prevent the user from manually making any change that would trigger a warning, select the **Warnings are hard limits for the user** check box.
5) Click **OK** to save and close the Preferences window.

Preventing users from manually making changes that trigger warnings

You can configure Workforce Scheduling to prevent users from making changes that trigger warnings.

To prevent users from manually making changes that trigger warnings

1) On the application menu, click **Preferences**.
2) Click the **General** tab.
3) Select the **Warnings are hard limits for the user** check box.
4) Click **OK** to save and close the Preferences window.

Configuring the default colors on the time bar

To configure the default colors used for events on the time bar

1) On the application menu, click **Preferences**.
2) Click the **Display** tab.
3) Under **Default Timebar Colors**, after **Default Shift Color**, select a color.
4) Repeat step 3 for **Default Break Color**, **Default Job Color**, **Default Time Off Color**, and **Unavailable Color**.
5) Click **OK** to save and close Preferences window.

Configuring the time format

There are two time formats you can select from: the 24 hour international format or the 12 hour format which uses A.M. and P.M. to indicate morning and afternoon. For example, 3 o’clock in the afternoon appears as 15 if you select the 24 hour time format or 3 P.M. if you select the 12 hour time format.

To configure the time format

1) On the application menu, click **Preferences**.
2) Click the **General** tab.
3) After **Hour Format**, select either **12 Hours** or **24 Hours**.
4) Click **OK**.

Configuring tool tip display

You can specify the following information in tool tips for shifts, jobs, breaks, time off events, unavailable periods, and shadow events:

- **Schedule name—** provides the name of the schedule in which the event appears.
- **Is recurring** —displays if the event recurs.
- **Type—** provides the name of the event.
- **Type name—** states if the event is a shift, job, break, time off event, unavailable period, or shadow event.
- **Start/End Time—** provides the start and end time of the event.
- **Event Notes—** provides any notes from the detail grid for the event.

To configure the tool tip display

1) On the application menu, click **Preferences**.
2) Click the **Display** tab.
3) Under **Tooltip Display**, select the check boxes for the tool tips to display.
4) Click **OK**.

Configuring warnings

Warnings notify you when you try to schedule events outside of your scheduling parameters.

You can set the following warnings:

- Schedule warnings
- Shift warnings
- Break warnings
- Job warnings
- Overtime warnings
- Time Off warnings
- Employee scheduling warnings
- Schedule Builder warnings
- Employee selection warnings

To configure warnings

1) On the application menu, click **Preferences**.
2) Click the **Warnings** tab.
3) Ensure the check boxes of the warnings you want to configure are selected.

See the following table.

4) Click **OK**.

Table 37: Warnings (Sheet 1 of 2)

Warning	Description
Scheduling work on company holidays	notifies you when events are scheduled on company holidays
Scheduling work outside business hours	notifies you when you try to schedule events outside of your contact center’s business hours
When scheduling outside employee's availability	notifies you when you try to schedule employees who are not available at the specified time
Violates Length of Service Qualifications	notifies you when an employee has worked fewer or more months required to qualify for a specific type of time off
Exceeds accrued hours	notifies you when an employee is scheduled for more time off hours than is available to that employee at that time
Exceeds Maximum Scheduling Limit	notifies you when an employee is scheduled for more time off hours than specified for that type of time off
Less than Minimum Scheduling Limit	notifies you when an employee is scheduled for fewer time off hours than specified for that type of time off
Employee does not have required skills	notifies you when an employee does not have the required skills for the job for which they are scheduled
Exceeds Daily Maximum Work Hours	notifies you when an employee is scheduled for more hours in a day than defined by the parameter for that shift
Below Daily Minimum Work Hours	notifies you when an employee is scheduled for fewer hours in a day than defined by the parameter for that shift
Exceeds Weekly Maximum Work Hours	notifies you when an employee is scheduled for more hours in a week than defined by the parameter for that shift

Table 37: Warnings (Continued) (Sheet 2 of 2)

Warning	Description
Below Weekly Minimum Work Hours	notifies you when an employee is scheduled for fewer hours in a week than defined by the parameter for that shift
Exceeds Yearly Maximum Work Hours	notifies when an employee is scheduled for more than the annual maximum hours required
Below Yearly Minimum Work Hours	notifies you when an employee is scheduled for less than the annual minimum hours required
Start time outside of specified range	notifies you when an employee's shift is scheduled to start before (minimum) or after (maximum) the parameters defined for that shift
Within Minimum Time Between Shifts	notifies you when an employee is scheduled to start another shift too soon following the one previously completed
Below hours worked to qualify	notifies you when an employee is scheduled for a break before working enough hours after the last break in that shift to qualify for another break
Starting before earliest start time	notifies you when an employee is scheduled for the first break in a shift before a break can be taken
Ending after latest end time	notifies you when an employee is scheduled for the last break in a shift after a break can be taken
Removing an employee from a schedule	notifies you when you attempt to delete an employee from the schedule
Accepting a generated schedule	notifies you when you attempt to save a schedule you have built
Scheduled shift will cause overtime	notifies you when a shift qualifies an employee for overtime

Forecasting data for schedules

After setting up and customizing your schedule, if you are building a schedule from forecasted data, you must run the Forecasting tool and export the forecast into your schedule before you can select this option in the schedule builder or schedule builder wizard.

For information on the Forecasting tool, see *"Forecasting tool"*.

To access the Forecasting tool

1) Click **Tools** in the **Workforce Scheduling** ribbon.
2) In the **Data Mining** section, click **Forecasting**.

Schedule creation

You can create and customize schedules in Workforce Scheduling using specific parameters that suit the needs of your contact center. You can build schedules manually or with the Schedule Builder tool. Schedule Builder automates the schedule building process. It uses pre-defined employee and schedule options to create schedules. See *"Schedule setup and customization"*.

Schedule Builder helps you build a schedule with or without forecast data. If you are building a schedule with forecast data, you must export the forecast data into your schedule before running the Schedule Builder if you want to build a schedule with forecast data. See *"Forecasting data for schedules"*.

You can also use manual scheduling to modify schedules you build with Schedule Builder. See *"Creating and adjusting schedules manually"*.

NOTE: After you generate a schedule with Schedule Builder, you must accept or reject schedule changes before you can generate another schedule.

Schedule Builder uses the following parameters to create a schedule automatically:

- Date/time range
- Shifts
- Breaks
- Forecast data
- Business hours
- Employees
- Employee scheduling preferences
- Scheduling options
- Shift options
- Schedule algorithm options

Building schedules with Schedule Builder

NOTE: After you generate a schedule with Schedule Builder, you must accept or reject schedule changes before you can generate another schedule.

To build a schedule with Schedule Builder

1) Click the **Tools** tab
2) In the Schedule Builder group, click **Manual**.
3) Under **Schedule name**, select a schedule.
4) Specify the scheduling parameters on each tab of the Schedule Builder tool.
5) Click **Build**.

A dialog box appears reminding you that changes to the schedule will not be committed to the database until you click Accept Schedule.

6) Click **OK**.

   The Accept Schedule and Reject Schedule buttons appear in the toolbar.

7) Verify the schedule.
8) Make any required modifications manually.
9) Click **Accept schedule** to save the new schedule.

   NOTE:

   – After you click Accept Schedule, the schedule is live in the database and the Accept Schedule button disappears. If you click Reject Schedule, the automatically generated schedule and any manual modifications are deleted from the schedule. See *"Creating and adjusting schedules manually"*.

   – If there are any conflicts, a dialog box appears stating the number of conflicts. You cannot save a schedule with conflicts. Click Yes to delete the conflicts and accept the schedule, or click No to adjust the schedule. When you have resolved the conflicts, click Accept Schedule again to save the schedule.

Configuring the date and time range

To configure the date and time range for a schedule using Schedule Builder

1) In **Schedule Builder**, click the **General** tab.
2) Under **Dates and times**, on the **Date / Time** tab, select the date range of the schedule.
3) Under **Time**, select either **Use business hours**, **24/7**, or **Custom**.
4) If you selected **Custom** in the previous step, select the time the schedule starts and ends each day.
5) If you want to exclude dates from the schedule, click the **Exclusion** tab.
6) Hold down **CTRL** and then click the dates to exclude.

Scheduling shifts

To schedule shifts using Schedule Builder

1) In **Schedule Builder**, click the **General** tab.
2) Under **Schedule/Optimize**, select the **Shifts** check box.
3) Under **Event selection**, on the **Shift selection**tab, select the check boxes of the shifts to add to the schedule.
4) Click the **Shift**, **Break**, & **Job options** tab.
5) Under **Shift options**, specify how shifts will be distributed.

   – If you want to count existing shifts when determining the number of employees to be scheduled, select the **The Schedule Builder counts existing shifts when determining the number of employees which must be scheduled** check box.

   – If you want to optimize existing unlocked shifts, select the **Allow Schedule Builder to optimize existing unlocked shifts** check box.

- If you want to optimize existing locked shifts, select the **Allow Schedule Builder to optimize existing locked shifts** check box.
- If you want to schedule unassigned shifts for times when there are not enough employees available to satisfy the scheduling requirements, select the **Generate unassigned shifts when not enough employees are available to satisfy the schedule requirements** check box.
- If you want to ignore employee shifts assignments when building the schedule, select the **Ignore employee shift assignments** check box.

Scheduling jobs

To schedule jobs using Schedule Builder

1) In **Schedule Builder**, click the **General** tab.
2) Under **Schedule/Optimize**, select the **Fixed Jobs** check box.
3) Under **Event selection**, on the **Fixed Job selection** tab, select the check boxes of the job types to add to the schedule.
4) Click the **Shift**, **Break**, & **Job options** tab.
5) Under **Schedule fixed jobs on**, select the check boxes of the job types to apply shifts.

Generating schedules with forecast data

To build a schedule with forecast data using Schedule Builder

1) In **Schedule Builder**, click the **General** tab.
2) Under **Schedule Builder method**, after **Method**, select **Forecasted** data.
3) If you want fewer employees scheduled than are forecasted, move the slider towards **Under-schedule**.
4) If you want more employees scheduled than are forecasted, move the slider towards **Over-schedule**.
5) If you want to adjust the number of forecasted employees, next to **Increase/decrease the number of forecasted employees by**, enter a number.

Generating schedules without forecast data

To build a schedule without forecast data using Schedule Builder

1) In **Schedule Builder**, click the **General** tab.
2) Under **Schedule Builder method**, after **Method**, select **Explicit requirements**.
3) After **Number of employees to schedule**, enter a number.
4) If you want fewer employees scheduled than are forecasted, move the slider towards **Under-schedule**.
5) If you want more employees scheduled than are forecasted, move the slider towards **Over-schedule**.

Generating schedules for your entire workforce

To build a schedule for your entire workforce using Schedule Builder, regardless of employee availability

1) In **Schedule Builder**, click the **General** tab.
2) Under **Schedule Builder method**, after **Method**, select **Entire workforce**.
3) If you want to enable employee filtering, select the **Enable employee filtering** check box.

Selecting employees

To select the employees you want to schedule using Schedule Builder

1) In **Schedule Builder**, click the **Employee filtering** tab.
2) If you want to filter employees by agent group, under **Agent group**, select the check boxes of the agent groups to schedule.
3) If you want to filter employees by their skills, under **Skill**, select the check boxes of the required skills. Otherwise, skip to step 6.
4) Under the list of available skills, select an operand.
   – If the employees must have a skill level greater or equal to the skill level required, select **>=**.
   – If the employees must have a skill level lower or equal to the skill level required, select **<=**.
   – If the employees must have a skill level exactly equal to the skill level required, select **=**.
5) If you want to filter employees by name, under **Select employees with this name**, type an employee’s name.
6) If you want to select specific employees, under **Selected employees**, select the check boxes of the employees to schedule.
7) Click the **Employee sorting** tab.

   NOTE: You must configure the employee payroll information in order to select the seniority and pay rate parameters.
8) If you want to prioritize how shifts are distributed to employees, select the **Use employee sorting** check box, and select the criteria with which to sort employees.
9) If you want to assign or edit employee priority numbers, under **Employee priority**, select an employee.
10) Under **Priority**, type a personal priority number.
11) Click the **Overrides** tab.
12) If you want to override employee work hour preferences, under **Work hours**, select the check boxes to override daily work hours, weekly work hours, and the minimum time between shifts.
13) If you want to override employee availability, under **Availability**, select the check boxes to override employee availability and unavailable events currently applied to the schedule.
14) If you want to override scheduled time off, under **Time off**, select the **Override time off events currently applied to the schedule** check box.
15) If you want to override an employee's skills required to do the fixed job, under **Fixed Jobs**, select the **Override an employee's skills required to do the fixed job**.

Configuring scheduling options

To configure schedule options Schedule Builder uses to create a schedule

1) In **Schedule Builder**, click the **Advanced options** tab.
2) Under **Schedule algorithm performance**, specify the settings Schedule Builder will use to build the schedule.
3) If you want to optimize break distribution, under **Optimization types**, select the **Optimize break distribution** check box.
4) If you want to optimize shift placement, select the **Optimize shift placement** check box.
5) If you want to optimize shift size, select the **Optimize shift size** check box.
6) If you want to balance the distribution of employee shifts over the week, select the **Balance over the week** check box.

   Selecting this option ensures that Schedule Builder does not completely fill the requirements of the first few days of the schedule and understaff employee requirements by the end of the week.

Creating and adjusting schedules manually

You can create entire schedules manually. However, if you must schedule a large number of employees it can be quite complicated and time consuming. Schedule Builder automates the process and builds schedules for you. You can manually adjust schedules created with Schedule Builder. You can create and adjust schedules manually in the following ways:

- Load a schedule
- Populate a schedule with events
- Drop insert an event
- Drag insert an event
- Recur an event
- Mass recur an event
- Mass delete an event
- Mass apply time off
- Modify a forecast total
- Modify event times or notes

Loading schedules

NOTE: Your access rights determine which schedules you can view, modify, or manage.

To load a schedule

1) Click **File > Load schedules**.
2) Select the schedule(s) to load.
3) If you want to load all active schedules, select the **Select all active schedules** check box.
4) Click **Load**.

Populating schedules with events

NOTE:

- Your access rights determine which schedules you can view, modify, or manage.
- For ease of use and accuracy when inserting events, select a schedule view of less than 1 week (View > Schedule View) prior to insertion.

You can manually insert the following events into a schedule:

- Shifts
- Breaks
- Jobs
- Time off
- Unavailable periods

You can insert events in a schedule by either dropping or dragging them on an employee's time line on the time bar pane. You can optionally drop insert breaks or jobs into already existing fixed shifts. Drop inserting events is most useful for fixed events, as the duration of the shift is predefined. Drag inserting events is most useful for variable shifts, as the duration can vary depending on the defined parameters for a specific event.

NOTE: To accommodate for last minute scheduling changes, you can optionally schedule time off and unavailable events in the middle of scheduled shifts or schedule a shift in the middle of time off and unavailable events.

Drop inserting events

To drop insert an event

1) Click the **Insert** tab.
2) Click **Drop**.
3) Under **Event**, select the event to add to the schedule.
4) Under **Schedule**, select the schedule to add events to.
5) Under **Event name**, select the name of the event to add to the schedule.
6) On the time bar pane, click the employee's time line to insert the event.
   The event is added to the schedule.
7) Repeat steps 3-6 for every event to add to the schedule.

Drag inserting events

NOTE: Drag insert is not available in the 1 month schedule view.

To drag insert an event

1) Click the **Insert** tab.
2) Click **Drag**.
3) Under **Event**, select the event to add to the schedule.
4) Under **Schedule**, select the schedule to add events to.

5) Under **Event name**, select the name of the event to add to the schedule.
6) On the time bar pane, click the employee's time line and drag the cursor from the start time to the end of the event.
7) Repeat steps 3-6 for every event to add to the schedule.

Recurring events

You can recur shifts, time off, and unavailable events.

To make an event recur

1) On the time bar pane, on the employee's time line, right-click the event to recur.
2) Click **Recurring**.
3) Click **Daily**, **Weekly**, or **Monthly recurring**.
4) Specify the pattern and range of the recurrence.
5) Click **OK**.

Mass recurring events

You can use the Mass recurrence wizard to create multiple recurrences for several events automatically. The wizard allows you to mass recur shifts, time off, and unavailable periods based on either a daily or weekly template.

NOTE: Manual or mass deletion is required to remove the generated events.

To mass recur events

1) Click the **Tools** tab.
2) In the **Bulk operations** group, click **Recurrence**.
   The Mass Recurrence wizard opens.
3) Click **Next**.
4) Follow the steps in the wizard to specify the parameters of the events to mass recur.
5) Click **Finish**.
6) Click **Yes**.

Mass deleting events

You can delete one or more scheduled events (shifts, time off periods, unavailable periods, breaks, and jobs) at a time with the Mass delete option. Only the selected events are deleted from the schedules.

To mass delete scheduled events

1) Click the **Tools** tab.
2) In the **Bulk operations** group, click **Delete**.
3) Specify the date range affected, event types to delete, and the schedules to delete events from.
4) Click **OK**.

Mass applying time off

You can apply time off to any or all agents in a schedule simultaneously.

To mass apply time off

1) Click the **Tools** tab.
2) In the **Bulk Operations** group, click **Time Off**.

   The Timeoff Mass Insert dialog box opens.
3) Select a schedule from the **Schedules** drop-down list.
4) Hold down **CTRL** and then click the agents to which you want to apply the time off type. If you want to select all agents, click **Select All**.
5) Under **Time off**, select the time off type from the list.
6) Select the start and end dates, days of the week, and start and end times for the time off type.
7) After selecting the time off time, select **Mark remaining periods of the day as unavailable** if you want the hours outside of the start and end times to be unavailable for scheduling.
8) Click **OK**.

Modifying forecast totals in the event totals pane

If you build schedules with forecast data, you can adjust the forecast totals on the event totals pane. On the events totals pane, you can change forecast totals in time intervals as small as 15 minutes. The schedule view you select determines the time interval of the forecast totals. See *"Changing the time interval of the time bar pane"*.

For example, if you select the 8 hour schedule view, you can change the forecast data in 15 minute intervals. However, if you select the 1 day schedule view, you can change the forecast data in 1 hour time intervals. When you change the forecast data in an interval larger than 15 minutes and then change the view to smaller intervals, you will notice that the change applies to each of the smaller intervals.

NOTE: Schedule Builder uses the latest forecast data to calculate the number of employees required.

To change the forecast totals in the events totals pane

1) After **Totals**, click **+**.
2) Select the **Forecast** check box and the check boxes of any other event totals to view.
3) Click **-**.
4) Click the **View** tab.
5) Under **Schedule view**, select a time interval.

   See "Schedule views and corresponding event total".
6) Click the **+** before **Forecasted** to expand the forecast tree.

   The event totals for the loaded schedules appear.

   NOTE: You can use the Tab key to select cells to the right, and the Shift+Tab keys to select cells to the left.
7) Click a cell in the forecast event total grid and type the new forecast total for this time interval.

Modifying event times and notes in the schedule details pane

The changes you make to event start times and end times in the schedule details pane are immediately reflected in the time bar pane.

To modify the start and end times of events in the schedule details pane

1) On the schedule **Details** pane, click the **Start Time** or **End Time** of an event.
2) Type the new time.
   The new time is immediately reflected in the time bar pane.
3) Repeat for any other event times to modify.

To modify the start and end times of events in the time bar pane

1) Click the **Insert** tab.
2) Click **Select**.
3) On the time bar pane, select the event to modify.
4) Drag and drop the event to adjust its start and end times.
   The new time is immediately reflected in the time bar pane.
5) Repeat for any other event times to modify.

To add/edit a note for a scheduled employee

1) On the schedule **Details** pane, click the note field for an employee.
2) Click the **...** button.
   The Notes editor appears.
3) Type/edit a note.
4) Click **OK**.

Schedule distribution

You can specify viewing preferences, specify access rights to schedules, and run and print reports.

Viewing schedules

You can specify how you view the time bar pane. Use the scroll bar to view other days and times in the schedule. If you reach the end of the month and want to view dates for the next month, you can click the arrow on the scroll bar to load the schedule for the next month. By default, events you insert into a schedule are snapped to the grid in 30 minute increments.

To view a specific date

1) From any tab in Workforce Scheduling, click **Select date**.
2) Click the date to view.
   The time bar will display the date you selected to view.

Viewing scheduled events

You select how event time bars appear in **File > Preferences**. You can isolate shifts, time off, and unavailability to view them separately in the time bar pane. You must view breaks and jobs with shifts. You cannot isolate breaks and jobs in the time bar pane. See *"Configuring event display preferences"*. You can select what information displays in the Tooltip in Preferences. For more information, see *"Configuring tool tip display"*.

If employees belong to more than one schedule and you are viewing only one of the schedules to which the employees belong, any events scheduled in the other schedule will appear as a shadow event (gray bar) in the time bar view. Shadow events will not display for inactive schedules.

To view shifts

- On the **View** tab, in the **Show/Hide** group, select the **Shift** check box.

To view jobs

- On the **View** tab, in the **Show/Hide** group, select the **Job** check box.

To view breaks

- On the **View** tab, in the **Show/Hide** group, select the **Break** check box.

To view time off

- On the **View** tab, in the **Show/Hide** group, select the **Time off** check box.

To view unavailable periods

- On the **View** tab, in the **Show/Hide** group, select the **Unavailable** check box.

To view shadow events

- On the **View** tab, in the **Show/Hide** group, select the **Shadow** check box.

Changing the time interval of the time bar pane

You can view schedules in the time bar pane over 8 hour, 12 hour, 1 day, 2 day, 1 week, 2 week, or 1 month time intervals. The default view is the 12 hour view.

To change the time interval in the time bar pane to one week

1) Click the **View** tab.
2) In the **View options** group, under **Schedule view**, select the interval to view.
3) Optionally, under **Group view**, select **Supervisor** to group employees in the time bar pane by schedule.

Viewing event totals

Event totals represent the total number of employees for an event. You can view event totals in 15 minute, 30 minute, 1 hour, 4 hour, or 1 day time intervals. The following table displays the event total time intervals that correspond to the schedule views.

Table 38: Schedule views and corresponding event total time intervals (Sheet 1 of 2)

Schedule view	Event totals time interval
8 hour	15 minute
12 hour	30 minute
1 day	1 hour
2 day	4 hour

Table 38: Schedule views and corresponding event total time intervals (Continued) (Sheet 2 of 2)

Schedule view	Event totals time interval
1 week	1 day
2 week	1 day
1 month	1 day

You can select from the following event totals:

Forecast—appears only after you have applied a forecast to a schedule. This total represents the number of employees required to meet your specified Service Level objectives.

Scheduled—represents the number of employees scheduled at that time

Over/Under—represents the excess (over) or inadequate (under) number of employees scheduled when compared to the number of employees forecasted.

On Break—represents the number of employees scheduled for a break at a certain time

ACD Jobs—represents the number of employees scheduled to perform ACD jobs

Non ACD Jobs—represents the number of employees scheduled to perform Non ACD jobs

At work—represents the number of employees scheduled to handle interaction requests

Overtime—represents the number of employees scheduled for overtime

To view event totals

1) In the **Totals** pane, click **+**.
2) Select the check boxes of the event totals to view.
3) Click **-**.

   The totals pane appears with the event totals you selected.

Viewing schedule details

To group information in the schedule details pane

- On the schedule details pane, drag and drop the column header to organize to the **Drag a column header here to group by that column** area on the window.

To sort information in the schedule details pane alphabetically

- On the schedule details pane, click the header of the column to sort alphabetically.

To filter information in the schedule details pane

1) On the schedule details pane, click the arrow on a column header.
2) Select the filter criteria.

Synchronizing views

You can synchronize the people pane, time bar pane, and totals pane with the order of the information in the schedule details pane. Once you have organized the details of your schedules (sorting, filtering, and grouping) in the schedule details pane, synchronize views to reflect the order you have selected. For information on how to sort, filter, or group schedule details, see *"Viewing schedule details"*.

To synchronize views

1) Click the **View** tab.
2) Select the **Synchronize time bar view with details view** check box.
3) Optionally, select the **Vertical scrolling** check box.

Running Workforce Scheduling reports

The Workforce Scheduling reports are produced in Microsoft Excel format. You run and print the following Workforce Scheduling reports from CCMWeb. For more information, see the Reports Guide appropriate to your Mi Contact Center Business licensing level.

You can produce on-demand reports and scheduled reports for the following reports:

- Detailed Schedule by Employee with Totals
- Schedule by Employee by Time Off by Day of Week
- Employee Configuration
- Summary Schedule by Employee
- Schedule Coverage Totals by Type
- Work Hours Summary Schedule by Employee

Workforce Scheduling reports are found in CCMWeb, under **Reporter > Workforce Scheduling > Schedules**.

Schedule Adherence

Mitel Schedule Adherence is an optional application that works in conjunction with MiContact Center Business and Workforce Scheduling. Schedule Adherence resides in the Contact Center Client real-time monitors and enables you to view the real-time state of contact center employees scheduled in Workforce Scheduling. Schedule Adherence compares the current activities of employees to the configured schedule and alerts you in real time when employees are out of adherence. Employees are considered out of adherence if they are early or late for their scheduled events or if they are not performing scheduled events.

Once you have configured a schedule in Workforce Scheduling, you

- Configure adherence preferences in Workforce Scheduling
- View adherence monitors in Contact Center Client
- Set adherence alarms on the Employee State by Position/Time monitors (optional)
- Run reports on employee adherence to scheduled events

Configuring adherence preference

You can configure adherence thresholds for shifts, breaks, and jobs. You can set parameters for each event type to suit the needs of your business. You select employee states and assign them to relevant events and specify event time tolerance levels. You can optionally configure groups of employee states and then associate them to relevant employee events.

NOTE:

- Schedule Adherence will handle two or more overlapping adherence thresholds in one of the following ways. If only one of the events is valid for the current employee state, that event will be used. If more than one event is valid for the current employee state, the first event, using start time, will be used.
- If no states are specified for an event type, all states will be considered in adherence.

Configuring adherence parameters

To configure adherence parameters

1) In Workforce Scheduling, click the **Configuration** tab.
2) In the **Adherence group**, click **Adherence Configuration**.
   The Adherence Parameters window opens.
3) In the left pane, expand the event type list and select the event to which you want to add relevant adherence states.
4) Under **Event start tolerance (hh:mm)** , specify the times before and after which an employee state will be reported on as out of adherence.
5) Under **Event end tolerance (hh:mm)**, specify the times before and after which an employee state will be reported on as out of adherence.
6) Under **Available states**, select the states which are relevant for the specified event type and click **>** to move the state to the **Assigned states** list.
7) Repeat the above steps for each event type for which you want to configure adherence parameters.
8) Click **OK**.

Configuring state groups

To configure a state group

1) In Workforce Scheduling, click the **Configuration** tab.
2) In the **Adherence group**, click **State groups**.
   The State groups window opens.
3) Click **Add**.
4) Type a name for the state group and click **Create**.
5) Under **Available states**, select the states that are relevant for the state group and click **>** to move the state to the **Assigned states** list.
6) Repeat steps 2-5 for each state group you want to configure.
7) Click **OK**.

Viewing adherence monitors in Contact Center Client

Schedule Adherence includes two Contact Center Client monitors that enable you to monitor employee adherence to schedules in real time. The Schedule Adherence monitors alarm on employees who are not adhering to schedules based on the thresholds you specify in Workforce Scheduling and the alarms you configure in Contact Center Client. You can optionally set adherence alarms on the Employee State by Position/Time monitors.

Adherence Detail Grid monitor

The Adherence Detail Grid monitor displays employee scheduled events, expected states, and event totals. It enables you to easily compare expected employee states and actual employee states in real time.

There are three levels to the Adherence Detail Grid monitor. The first level provides a high level overview of employee adherence. The second level has two grids. The first lists all of the embedded events (breaks and jobs) for the shift and the associated adherence information. The second grid lists the out of adherence record for the shift. The final level has only one grid, which represents the out of adherence record for the embedded events.

The following table provides column heading definitions for the Adherence Detail Grid monitor.

Table 39: Adherence Detail Grid monitor headings (Sheet 1 of 2)

Heading	Definition
Employee	the name of the employee being monitored
Is in Adherence	the check box is enabled when the employee is adhering to the schedule
Scheduled	the type of event (shift, break, or job) the employee is performing, whether in or out of adherence
Expected States	the employee states that are relevant for the type of scheduled event the employee is scheduled to perform
Actual State	the current employee state. If this is one of the expected states, the employee is adhering to the schedule
Scheduled Start	the time at which the employee is scheduled to start the scheduled event
Actual Start	the time at which the employee started the scheduled event. This column may be blank if the employee has not come into adherence for the scheduled event
Scheduled End	the time at which the scheduled event is to end

Table 39: Adherence Detail Grid monitor headings (Continued) (Sheet 2 of 2)

Heading	Definition
Current Out Of Adherence	the amount of time the employee has been out of adherence since the last scheduled event, minus any tolerances configured. This column will be blank if the employee is adhering to the schedule
Total Out Of Adherence	the total amount of time the employee has been out of adherence for all scheduled events for the current shift
Shift Time	the duration of time the employee has been working the current shift
% Out Of Adherence	the percent of time the employee has been out of adherence for the elapsed portion of the scheduled shift
Shift	the name of the shift for which the employee is scheduled
Embedded	the name of the embedded event type (break or job)
Start	the time at which the employee went out of adherence
End	the time at which the employee came back into adherence

You can set alarms on the Adherence Grid monitor to alarm on employee adherence. For example, in an adherence grid monitor, you could set an alarm on the Scheduled variable and set the value to Unscheduled and have it display as red text, enabling you to clearly see when an employee is not adhering to the shift as expected.

You can alarm on the following performance variables in the adherence detail grid monitor:

- Out of adherence
- Scheduled

  NOTE: To alarm for when the employee is in Time off or Unavailable states, set the value to Unscheduled.
- Expected states
- Actual state
- Actual start
- Current Out of Adherence
- Total Out of adherence

- Shift time
- % Out of adherence

To open the Adherence Detail Grid monitor

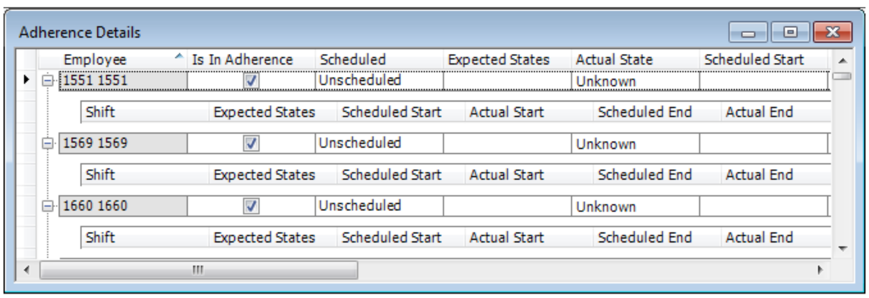
1) Click the **Real Time** tab in the Contact Center Client ribbon.
2) From the drop-down arrow in the **Adherence** column, select **Detail Grid**.

   The Add/Remove device IDs window opens.
3) Select the **Employees** or **Schedules** for which you want to review Adherence.
4) Click **OK**.

   The Adherence Details monitor opens.

   See the following figure.

Figure 101: Adherence Detail Grid monitor



To alarm on schedule adherence in an Adherence Detail Grid monitor

1) Right-click anywhere in the monitor and click **Set alarms**.
2) Under **Performance variables**, select the variable you want to monitor.
3) Under **Alarm thresholds**, click **Add** and select a value for that variable you selected as well as the alarm notification options that will indicate when the variable exceeds those boundaries.

   For more information on configuring monitor alarms, see "Setting alarms".
4) If you want to add further alarms for the variable, repeat step 3.
5) If you want to add an alarm for another variable, repeat steps 2-5.
6) Click **OK** to save the alarms.

Adherence Timebars monitor

The Adherence Timebars monitor provides a schedule time bar, based on the employee time bar and event colors configured in Workforce Scheduling, for each employee's scheduled events. The current time is identified by a green line on the employee time bar and past events are shaded purple.

You can set alarms on the Adherence Grid monitor to alarm on employee adherence. The following performance variables can be alarmed on in the adherence timebars monitor:

- Shift out of adherence
- Break out of adherence
- Job out of adherence

To open the Adherence Timebar monitor

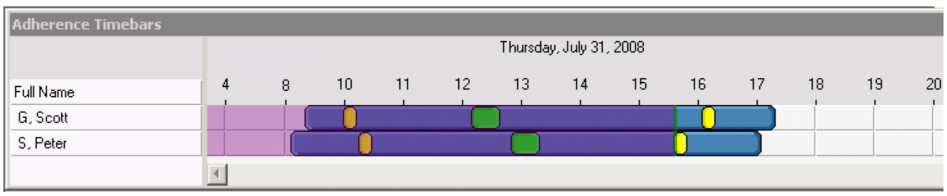
1) Click the **Real Time** tab in the Contact Center Client ribbon.
2) From the drop-down arrow in the **Adherence** column, select **Timebars**.

   The Add/Remove device IDs window opens.
3) Under **Schedules**, select a schedule to include in the monitor or under **Employees**, select the employees to monitor.
4) Click **OK**.

   The Adherence Timebars monitor opens.

   See the following figure.

Figure 102: Adherence Timebars monitor



To alarm on schedule adherence in an Adherence Timebar monitor

1) Right-click anywhere in the monitor and click **Set alarms**.
2) Under **Performance variables**, select the variable you want to monitor.
3) Under **Alarm thresholds**, click **Add** and select a value for that variable you selected as well as the alarm notification options that will indicate when the variable exceeds those boundaries.

   For more information on configuring monitor alarms, see "Setting alarms".
4) If you want to add further alarms for the variable, repeat step 3.
5) If you want to add an alarm for another variable, repeat steps 2-5.
6) Click **OK** to save the alarms.

Employee State by Position/Time monitors

You can alarm on employees who are not adhering to schedules on the Employee State by Position/Time monitors using the Out of adherence performance variable. This variable measures the duration of time an employee is out of adherence, enabling more targeted alarming on the time and degrees for which an employee is out of adherence.

To set an adherence alarm on the Employee State by Position/Time monitors

1) Right-click an Employee State by Position/Time monitor and click **Set Alarms**.

   NOTE: You can select the Apply the alarm thresholds to all devices displayed on the monitor option to apply the threshold settings for performance variables across all employees. Alternatively, you can select Apply the alarm thresholds to a specific list of devices to apply the threshold settings for performance variables to a list of employees.
2) If you selected **Apply the alarm thresholds to a specific list of devices**, under **Devices**, select the employee(s) to which you want to apply the alarm thresholds.
3) Under **Performance variables**, select **Out of adherence**.

4) Under **Alarm threshold**, click **Add** and specify the boundary for alarming and set the options for the background color, font color, sound, pop-up, bring to front, and email.
5) To add an additional threshold for alarming, repeat step 4.
6) Click **OK**.

Alarming on schedule adherence

Supervisors can set alarms on adherence monitors in Contact Center Client to alarm on employee adherence by configuring an alarm in Contact Center Client using the Scheduled Performance Variable set to a specific value (such as unscheduled).

For example, in an adherence grid monitor, you could set an alarm on the Scheduled variable and set the value to Unscheduled and have it display as red, enabling you to clearly see when an employee is not adhering to the shift as expected.

You can alarm on the following performance variables in the adherence detail grid monitor:

- Out of adherence
- Scheduled
- Expected states
- Actual state
- Actual start
- Current Out of Adherence
- Total out of adherence
- Shift time
- % out of adherence

You can alarm on the following performance variables in the adherence timebars monitor:

1) Shift Out of adherence
2) Break Out of adherence
3) Job Out of adherence

To alarm on schedule adherence

1) Right-click anywhere in the monitor and click Set alarms.
2) Under Performance variables, select the variable you want to monitor.
3) Under Alarm thresholds, click Add and select a value for that variable you selected as well as the alarm type(s) that will indicate when the variable exceeds those boundaries.
4) For more information on configuring monitor alarms, see *"Setting alarms"*.
5) If you want to add further alarms for the variable, repeat step 3.
6) If you want to add an alarm for another variable, repeat steps 2-5.
7) Click OK to save the alarms.

Running Schedule Adherence reports

The Schedule Adherence reports are produced in Microsoft Excel format. You run and print the following Schedule Adherence reports from CCMWeb. For more information, see the Reports Guide appropriate to your MiContact Center Business licensing level.

You can produce on-demand reports and scheduled reports for the following reports:

- Employee and Employee Group Adherence Trace
- Employee Group Time Out of Adherence by Employee by Day of Week
- Employee Group Time Out of Adherence by Day of Month
- Employee Group Adherence by Period

Schedule Adherence reports are found in CCMWeb, under**Reporter > Workforce Scheduling > Schedule Adherence**.

Employee Portal

Mitel Employee Portal enables employees to view and trade shifts online and request changes to schedules for time off, shifts, and availability. Employee Portal enables schedulers to view employee requests, perform what-if scenarios, quickly approve or deny requests, and automatically update schedules.

Access to Employee Portal features is dependent on your administrative-set security roles.

Employee Portal and employees

Using Employee Portal, employees can

- View their currently scheduled shifts and the shifts of other employees who share their schedule
- View messages from supervisors and employees and receive updates about the status of their requests on the home page
- Offer shifts to the bulletin board for other employees to take or trade
- Remove shifts from the bulletin board
- Propose to take shifts from the bulletin board
- Propose to trade shifts from the bulletin board
- Accept or reject employee proposals to take or trade your shift
- Request time off
- Request changes to your availability

The Employee Portal home page provides links to the bulletin board, view and offer your scheduled shifts for take or trade, view your pending offers, request time off, and request availability changes. Any Employee Portal alerts that require your attention also display on the home page. These include

- You have approved shift requests
- You have denied shift requests
- You have shift requests pending supervisor approval
- You have shift proposals pending your acceptance
- You have shift proposals pending acceptance or that have been rejected

- You have time off requests pending supervisor approval
- You have notes regarding your availability

If a home page alert is red, it requires your attention. Click View to view the alert and any employee or supervisor notes in detail.

Starting Employee Portal

To start Employee Portal

1) Open **Employee Portal**.
2) Type your **Username** and **Password**.
3) Click **Login**.

Creating a desktop shortcut to Employee Portal

To create a desktop shortcut to Employee Portal

1) Open **Employee Portal**.
2) Type your **Username** and **Password**.
3) Click **Login**.
4) Drag and drop the Employee Portal web address from the address bar to your computer desktop.

Viewing currently scheduled shifts

To view your currently scheduled shifts

1) In Employee Portal, click **My shifts**.
2) If you want to view shifts starting on a specific calendar day, select the start date from the calendar.
3) Optionally, to view the break and job details for a specific shift, under **Details**, click **Select**.

Viewing the shifts of other employees in your schedule

You can view the shifts for other employees in your schedule to help you determine potential shift swaps.

To view the shifts of other employees in your schedule

1) Click **My Schedules**.
2) To view shifts starting on a specific day, select the start date from the calendar.
3) Click **Select** next to the employee for which you want to view the shift.
   The break and job details for the shift display below.

Offering shifts for other employees to take or trade

You can offer shifts to the bulletin board for other employees to take or trade. You can remove shifts from the bulletin board at any time as long as no employees have proposed to take or trade the shift. Shifts that have already begun cannot be posted to the bulletin board for other employees to take or trade.

To offer a shift for other employees to take or trade

1) Click **Offer my shifts**.
2) Next to the shift you want to offer for other employees to take or trade, click **Select**.
   The shift details display.
3) Click **Continue**.
4) Optionally, type a note to accompany your offer.
5) Click **Submit**.

Removing shifts from the bulletin board

You can remove shifts from the bulletin board at any time as long as no employees have proposed to take or trade the shift. If a proposal has been made, you will need to reject it first before you can remove the shift from the bulletin board.

To remove a shift from the bulletin board

1) Click **My pending offers**.
2) Next to the shift you want to remove from the bulletin board, click **Select**.
   The shift details display.
3) Click **Continue**.
   The shift offer is removed from the bulletin board.

Proposing to take shifts

To propose to take a shift

1) Click **Bulletin board**.
2) Next to the shift you want to take, click **Select**.
   The shift details display.
3) Click **Continue**.
4) Click **Next**.
5) Optionally, add a note to accompany your proposal.
6) Click **Next**.
7) Click **Submit**.

Proposing to trade shifts

To propose to trade a shift

1) Click **Bulletin board**.
2) Next to the shift you want to take, click **Select**.
   The shift details display.
3) Next to the shift you want to propose for trade, click **Select**.
4) Optionally, add a note to accompany your proposal.
5) Click **Next**.

6) Click **Submit**.

Accept or reject an employee proposal to take or trade your shift

To accept or reject an employee proposal to take or trade your shift

1) On the Employee Portal home page, next to **You have <#> shift proposals pending your acceptance**, click **View**.

   The Proposals window displays.

2) Next to the proposal you want to view, click **Select**.

   The proposal details display with any relevant employee notes.

3) Click **Accept** to accept the proposed shift change. Otherwise, click **Reject** to reject the proposed shift change.

Requesting time off

To request time off

1) Click **Request time off**.

   The Request time off window displays, including a list of any time off you have already scheduled.

2) Click **Request time off**.
3) Select a time off type from the list.
4) Click **Next**.
5) Specify the time off start and end times.
6) Click **Next**.
7) Optionally, add a note to accompany the time off request.
8) Click **Next**.

   The time off request summary displays.

9) Click **Submit**.

Requesting availability changes

NOTE: You can click Clear request at any time to reset the Request availability change window to your currently configured availability.

To request an availability change

1) Click **Request availability change**.

   The Request availability change window displays with your current availability.

2) If you need to change existing availability, under **Update current availability**, select a day of the week and click **Remove**. Otherwise, continue to step 3.
3) Under **Change availability**, specify the dates and times you are available to work.
   - After **Day of week**, specify the day of week you are available.
   - If you are only available during certain hours, select**Part of the day,** and specify the times at which you are available.
   - If you are available to work at any time during the day, select **Full day**.

4) Click **Add** to add the new availability to the request.
5) You can optionally select a currently configured availability day or time in the **Update current availability list** and click **Remove** to remove it from the list.

   NOTE: The Add button is for adding new availability to the Update current availability list only and not for replacing specific dates and times from the currently configured availability list.
6) Optionally, under **Employee note**, add a note to accompany your request.
7) Click **Accept**.

   The Confirm availability change window displays.
8) Specify the date that your requested availability will take effect.
9) Click **Submit**.

Employee Portal and Supervisors

Using Employee Portal, supervisors can

- View employee scheduling requests
- Preview the effect of approving or denying employee shift change requests
- Approve or deny employee proposals to take or trade shifts
- Approve or deny employee requests for time off
- Approve or deny employee requests for availability changes

Handling employee scheduling requests

NOTE: If you attempt to approve an employee's request for time off for a period where a schedule has yet to be built, time off will not be decremented properly and the time off will be entered as an unavailable event in the schedule.

To view, approve, or deny employee scheduling requests

1) Open **Workforce Scheduling**.
2) Log on to Workforce Scheduling.
3) Load an active schedule.
4) Click the **Employee Portal** tab.
5) Click the **Request mode** icon.
6) In the details pane, click the **Shift changes**,**Time off**, and **Availability** tabs to view any employee scheduling requests pending your approval.
7) Next to **Approve**, click the **+** to view the scheduling request details.
8) If you are viewing the Shift change tab, click **View timebar** to view the scheduled shift.
9) In the Employee requests group, click **Preview** to view the effect of approving the request.
10) In the Employee requests group,
    – Click **Approve** to approve the request.
    – Click **Deny** to deny the request.

    The schedule is automatically updated and employees are notified of the schedule request status.

Running Employee Portal reports

The Employee Portal reports are produced in Microsoft Excel format. You run and print the following Employee Portal reports from CCMWeb. For more information, see the Reports Guide appropriate to your MiContact Center Business licensing level.

The following reports are available with Employee Portal:

- Employee Portal Availability Requests
- Employee Portal Time Off Requests
- Employee Portal Shift Requests
- Employee Portal Shift Change Status

Employee Portal reports are found in the CCMWeb, under**Reporter > Workforce Scheduling > Employee Portal**.

Posting feedback and viewing our forums

Mitel has partnered with UserVoice, a third-party service, to host customer suggestions on https://micontactcenter.uservoice.com. When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Our forums enable you to send feedback directly to the people building the product. While we cannot comment on every suggestion, feedback is analyzed and considered for future releases.

NOTE: Please do not use the forums to submit product defects. To submit product defects, please contact your administrator or dealer.

Feedback can also be submitted directly to Mitel without posting the suggestion on the forums. For more general feedback, you can also provide a rating of your experience with MiContact Center Business.

NOTE: Please do not use feedback for requesting customer assistance. For assistance with MiContact Center Business, please contact your dealer or Mitel Customer Support.

To post feedback and view our forums

1) In YourSite Explorer, click **File > Feedback**.
2) Click **Got an idea? Tell us**.

   or

   Access the following URL: https://micontactcenter.uservoice.com.

To submit feedback directly

1) In YourSite Explorer, click **File > Feedback**.
2) Click **Contact Us**.

To rate your Mitel experience

1) In YourSite Explorer, click **File > Feedback**.
2) Click **Rate us**.

1.9. Appendix A

Installation and upgrade checklists

The following checklists are meant to provide dealers and installers who are familiar with MiContact Center Business software with a quick reference to the procedures required for installing and upgrading.

Included in the appendix are:

- A list of prerequisite and pre-installation notes for installations and upgrades
- A condensed list of steps for installing or upgrading MiContact Center Business
- A more detailed list, for installing MiContact Center Business 7.1 or upgrading from Version 6.x to 7.1

PROGRAMMING TRAFFIC DATA COLLECTION FOR THE 3300 ICP

This section describes the options you must program on the Mitel 3300 ICP Traffic Options Assignment form in order to collect traffic data and produce reports with the Traffic Analysis application.

The Traffic Options Assignment form is a form-driven method to obtain time-based traffic reports on telephone system usage. You can generate reports that cover attendant usage, channel utilization, system activity, data station usage, delay to dial tone, extension-to-extension calls, feature usage, and trunk use.

Traffic Options Assignment form

The Traffic Options Assignment form gives the communications site manager a form-driven method of obtaining time-based traffic reports on the usage of the system. Reports may be generated as required, covering attendant usage, channel utilization, system activity, data station usage, delay to dial tone, extension-to-extension calls, feature usage, and trunk utilization.

NOTE:

- You can define up to six different time slots.
- If the start and stop time are blank while the time slot is active, an error message is displayed when the commit operation is attempted; in this case, the changes will not be committed.
- No two traffic slot stops should be less than 5 minutes apart. This time is required for the system time to generate the previous report.
- Making changes to the data in this form and recommitting interrupts a traffic report that is running.

To program the Traffic Options Assignment form

1) Log onto the 3300 ICP telephone system.
2) Browse to the **Traffic Options Assignment** form.
3) Click **Change**.
4) Configure the traffic options as described in the following table.

Table 40: Traffic Options Assignment form (Sheet 1 of 2)

Option	Value
Time Slot Active	Select Yes to start a traffic session at the time specified in Start Time field and finish at the Stop Time field for each of up to six different slots. The report is resumed the next day at the same time. Select No to suspend the traffic report for the associated time slot. The traffic report will not run until Yes is entered and the form recommitted. Default is No. There can be no overlapping of ACTIVE time slots. Select: Yes
Start Time (-Hours, -Minutes)	Select the time the traffic report is to start running. Default is blank. The start time must be assigned for active time slots; it can be blank for inactive time slots. If the start time equals the stop time then the time period is 24 hours. Select: 00:00
Stop Time (-Hours, -Minutes)	Select the stop time for the report. If the session is to run for 24 hours, enter the same time as the start time. Default is Blank. The stop time must be assigned for active time slots; it can be blank for inactive time slots. If the start time equals the stop time then the time period is 24 hours. Select: 23:59
Period Length	Select the length of time (15, 30, or 60 minutes) that data is to be collected for the session before a traffic report is formatted and output. Default is 60 minutes. Select: 15
Usage Units	Select the type of units (Erlangs or CCS) the report is to use. Default is Erlangs. Select: Erlangs
Autoprint	Select Yes to spool the traffic report to the printer assigned to this function in the Application Logical Port Assignment form. Default is No. We will be using the LPR1 Port 1754 to output traffic. Select: Yes

Table 40: Traffic Options Assignment form (Continued) (Sheet 2 of 2)

Option	Value
Maximum Number of Traffic Files	Enter the maximum number of traffic reports to be stored in disk. Default is 10. Select: 10
Sections to include in Traffic Report Select Yes to enable the collection of data for each resource group that is to be included in the traffic report. Default is No	
Route Plans	Yes
Route Lists	Yes
Routes	Yes
Trunk Groups	Yes
Trunks	Yes
Links	No
Groups of Links	No
Channels	No
DTMF Receivers	Yes
Data Transceivers	No
Modem Groups	No
Data Station Groups	No
Attendant Groups	Yes
Attendant Consoles	Yes
Attendants	Yes

Assigning a port

You must assign a port to the 3300 ICP to output traffic data.

To enable traffic data output

1) Log on to the 3300 ICP telephone system.
2) Browse to **Application Logical Port Assignment**.
3) Select **Traffic Report Port**.
4) Click **Change**.
5) Under **Port Physical Name**, type **LPR1**.
6) Click **Save**.

Testing traffic output

To test that traffic is being output through port 1754

1) Click **Start > Programs > Accessories > Communications > Hyperterminal**.
2) After **Name** type **Traffic**.
3) Ensure that the red telephone icon is selected.
   See the following figure.

Figure 103: Red Telephone Icon

4) Click **OK**.
5) After **Connect using**, select **TCP/IP**.
6) After **Host address**, type the IP address of the 3300 ICP
7) After **Port number**, type **1754**.
8) Click **OK**.
9) Wait the Period Length you selected in the Traffic Options Assignment form, for example 15, 30 or 60 minutes. The traffic should then output to your screen.
10) After the output is complete, you can disconnect and close the hyper terminal window.

Configuring traffic options in MiContact Center Business

To configure the traffic collection options in MiContact Center Business

1) Start YourSite Explorer.
2) Click **Media Servers**.
3) Select a 3300 ICP media server.
   NOTE: Make note of the Media Server ID. You will need this ID number later.
4) Click the **Data Collection** tab.
5) Verify the Traffic Analysis check box is selected and the port is 1754.
6) Click **Save**.
7) Wait the interval you selected in the Traffic Options Assignment, for example 15, 30 or 60 minutes.
8) Browse to **<installation drive:>\Program Files (x86)\Mitel\MiContact Center\DataDirectory\Node_[Media Server ID]**.
   This is the directory of the media server for which you configured traffic options.
   You should see a new file with the following naming convention, TYYYYMMDD.txt. For example, T20050127.txt, where YYYY is the year, MM is the month, and DD is the date.
9) Double-click the file to open it and view the traffic data.

1.10. Appendix B

IVR Routing Architecture

IVR Routing can operate in different configurations depending on your scalable, resilient, and redundant business environment requirements.

Scalability

IVR Routing provides scalability by distributing call loads across multiple IVR;Routing instances, managed from a single user interface. Scalability enables you to increase your IVR Routing instances as your business grows, supporting geographically distributed instances and reducing the number of ports required for common IVR;Routing tasks.

Resilient Configuration

IVR Routing also provides resiliency, with multiple live systems and redundant ports that compensate when one system goes down and resilient ports across controllers. In a resilient configuration, calls are routed through the secondary telephone switch if the primary telephone switch fails. IVR Routing functionality then fails over to the secondary phone switch to continue routing calls.

NOTE: You cannot make any major provisioning changes, for example, create new devices or make changes to existing devices and their relations to workflow associations while in failover mode.

The following figure displays an example of IVR Routing configured with multiple MiVoice Business controllers, providing ACD resiliency.

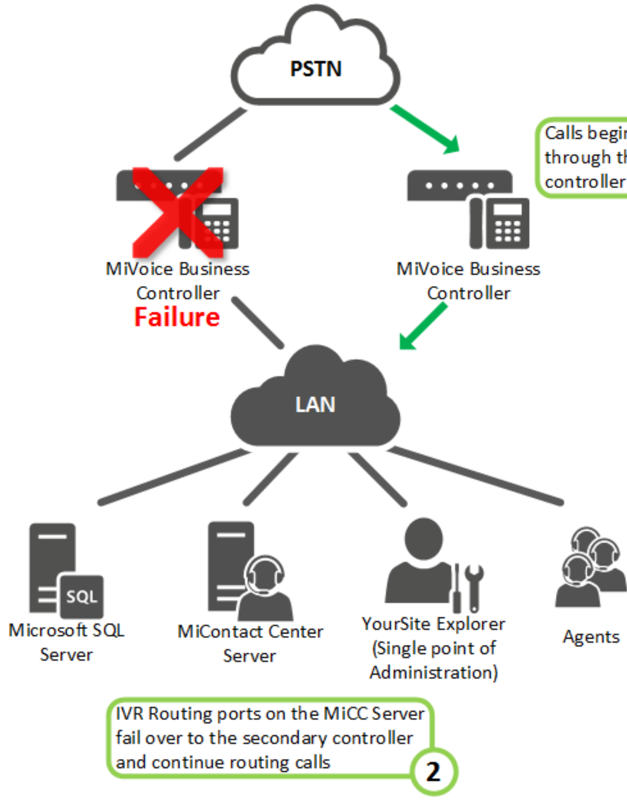


Figure 104: Resilient Configuration

Redundant Configuration

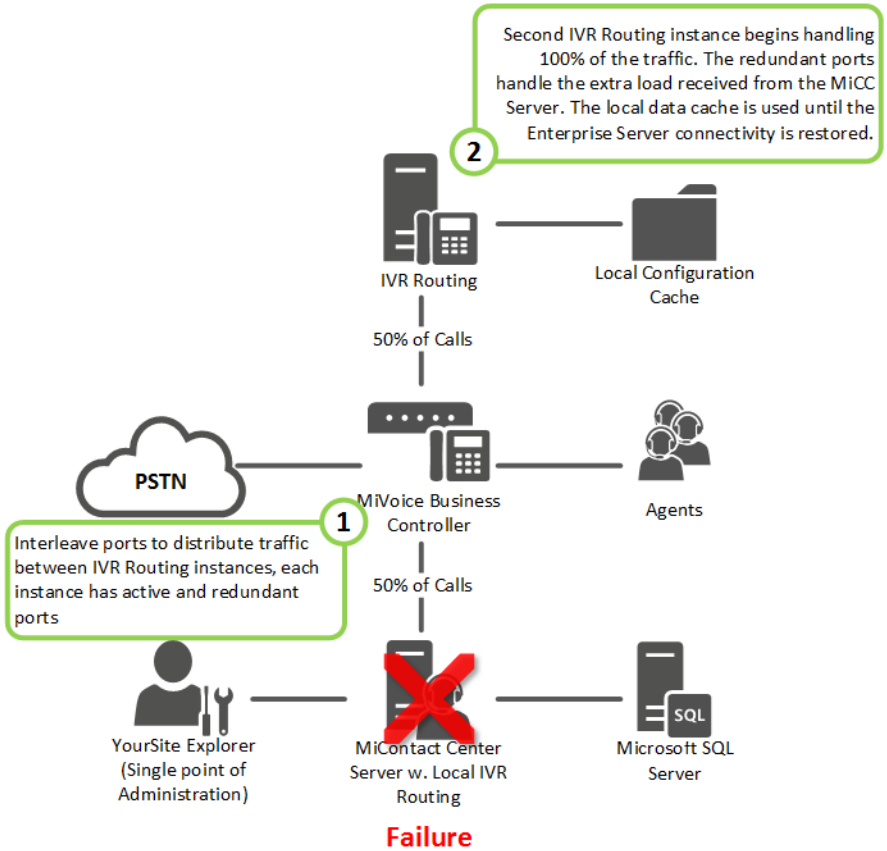
Resilient and reliable redundant IVR Routing environments are configured using multiple instances of live IVR Routing servers, with redundant ports to compensate when one system is impacted by hardware or software issues, network outages, or other unforeseen circumstances. Ports are resilient across multiple telephone systems and self-sufficient remote instances of IVR Routing will continue to function even if they lose connectivity to the primary database or site.

In the redundant IVR Routing configuration, the primary IVR Routing instance resides with the MiContact Center Business Server, which the secondary IVR Routing instance resides on a separate Remote Server. Each IVR Routing instance is assigned 50% of the ports and a matching set of redundant ports. If one server instance fails, it can use the redundant ports to handle the full call load.

NOTE: When using IVR Routing in a remote configuration, the Enterprise Server and all remote IVR;Routing servers must be in the same workgroup or domain to synchronize workflows correctly.

The following figure displays the redundant IVR Routing configuration.

Figure 105: Redundant configuration



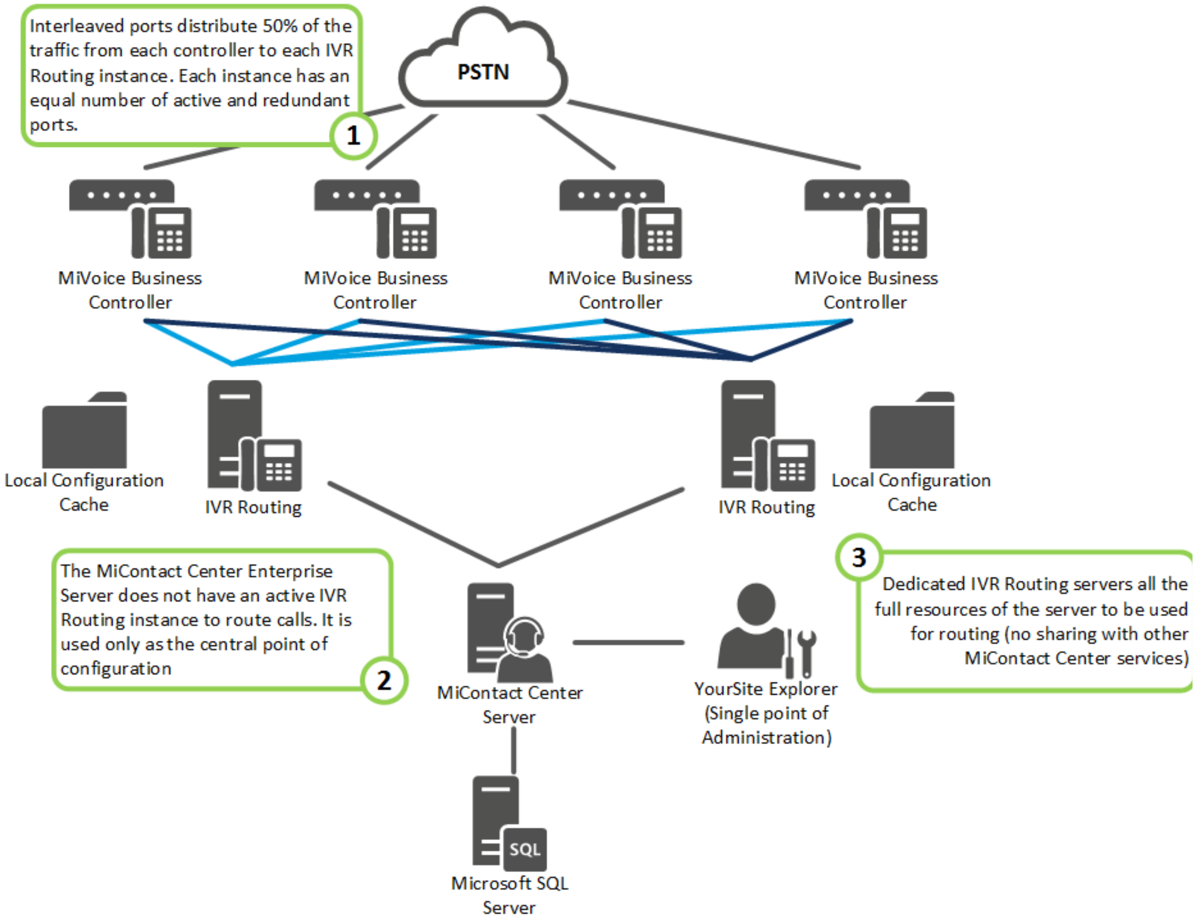
High Availability Configuration

IVR Routing high availability configuration consists of fully resilient controllers with dedicated highly available IVR Routing instances. Remote IVR Routing instances can be geographically dispersed to provide an added level of redundancy. In this configuration, we suggest IVR Routing not be installed on the Enterprise Server to avoid overloading the Enterprise Server hardware components. Each IVR Routing instance is on a dedicated server with a mirror of the Enterprise Server configuration information. If the Enterprise Server fails, all IVR Routing instances are unaffected. By making the telephone systems redundant in this configuration, if one IVR Routing instance fails, the remaining instances will pick up traffic from the telephone systems (up to the limitations of the hardware).

NOTE: When using IVR Routing in a remote configuration, the Enterprise Server and all remote IVR Routing servers must be in the same workgroup or domain to synchronize workflows correctly.

The following figure displays the resilient controller, dedicated high availability IVR Routing configuration.

Figure 106: High availability configuration



Workflows

If you are configuring IVR Routing workflows, see *"Building workflows"*.

If you are configuring Multimedia Contact Center workflows, see *"Multimedia routing using visual workflows"*.

Subroutines

If you are configuring IVR Routing subroutines, see *"Building subroutines"*

If you are configuring Multimedia Contact Center subroutines, see *"Building subroutines"*

Variables

If you are configuring variables for IVR Routing, see *"Adding variables"*.

If you are configuring variables for Multimedia Contact Center, see *"Working with variables in Multimedia Contact Center"*.

Adding a Microsoft SQL data provider

If you are configuring a Microsoft SQL data provider for IVR;Routing, see *"Adding a Microsoft SQL server as a data provider"*.

If you are configuring a Microsoft SQL data provider for Multimedia Contact Center, see *"Adding a Microsoft SQL server as a data provider"*.

Adding a Microsoft Excel worksheet data provider

If you are configuring a Microsoft Excel worksheet data provider for IVR Routing, see *"Adding a Microsoft Excel worksheet as a data provider"*.

If you are configuring a Microsoft Excel worksheet data provider for Multimedia Contact Center, see *"Adding a Microsoft Excel worksheet as a data provider"*.

Adding a LDAP data provider

If you are configuring a LDAP data provider for IVR;Routing, see *"Adding a LDAP as a data provider"*.

If you are configuring a LDAP data provider for Multimedia Contact Center, see *"Adding a LDAP as a data provider"*.

Real-time Monitors

The Enterprise Server continuously updates the real-time applications with gateway data and simultaneously updates connected clients through Transmission Control Protocol-Internet Protocol (TCP/IP). Real-time monitors are automatically updated to reflect device and device group changes made in YourSite Explorer. Supervisors and agents are provided with point-and-click access to real-time performance statistics for their contact center, enabling them to identify issues in contact center performance and see who is available to answer or assist with calls.

The real-time applications include Contact Center Client, Ignite (WEB), and WallBoarder. In Contact Center Client and Ignite (WEB), supervisors and agents can view real-time voice statistics and the phone availability of contact center agents and employees. In contact centers that have the Multimedia Contact Center optional application, supervisors and agents can view real-time voice, email, chat, SMS, and open media statistics. WallBoarder displays text messages and contact center statistics on one or more Spectrum Light Emitting Diode (LED) reader boards (wall signs). WallBoarder administration details are included in the *MiContact Center Business Installation and Administration Guide*.

Call recordings are initiated in Contact Center Client and are appended to specific Lifecycle reports.

In addition to real-time monitors, Contact Center Client includes the following application areas:

- **Interactive Contact Center**

Using Interactive Contact Center, you can control the availability of agents and ACD queues. Agents can log themselves on or off, and place themselves in or remove themselves from Make Busy or Do Not Disturb.

See "Interactive Contact Center".

- **Auditor**

  Using Auditor, supervisors can view the historical real-time events that occurred on a particular date, in the sequence they occurred, at your own pace.

  See "Auditor".

- **Management Console**

  Using Management Console, System Administrators can restart services, administer the database, and perform maintenance functions.

  System administration is described in the MiContact Center Business Installation and Administration Guide.

- **Data-mining**

  The ACD Inspector searches for agent and ACD queue event records. The SMDR Inspector searches through SMDR data to find specific contact center events.

  Data mining is described in the MiContact Center Business Installation and Administration Guide.

- **Contact Center Chat**

  Contact Center Client provides instant messaging capabilities for employees. Contact Center Chat provides the online chat presence of employees, including Online, Offline, and Away. Employees can view the availability and presence of other employees before they transfer calls or send online chat messages. With Microsoft Skype for Business Server, Contact Center Chat integrates with Skype for Business to provide enhanced presence.

  See "Using Contact Center Chat".

The following applications and features reside in Contact Center Client:

- **Interactive Visual Queue**

  Interactive Visual Queue is an optional application that enables agents to monitor calls within queues, move calls from busy queues to less active queues, and call back abandoned callers.

  See "Interactive Visual Queue".

- **Contact Center PhoneSet Manager and Contact Center Softphone**

  Contact Center PhoneSet Manager and Contact Center Softphone are optional applications that enable employees to use their desktop computers as IP-based phones.

  See "Contact Center PhoneSet Manager and Contact Center Softphone".

- **Contact Center Screen Pop**

  Contact Center Screen Pop is an optional application that launches applications or webpages. In addition, it enables agents to automatically receive caller and account information via pop-ups on their computer monitors every time they receive calls.

  Contact Center Screen Pop configuration and details are included in the MiContact Center Business Installation and Administration Guide.

- **Contact Center Chat with Skype for Business**

With the addition of Microsoft Skype for Business Server, employees and supervisors use Skype for Business as their default instant messaging client. The presence of all company employees is natively delivered in Contact Center Client. Contact center employees can view the presence of both internal and external contacts to determine if they are available to communicate. In addition to Available, Offline, and Away, employees see In a Meeting, Busy, In a call, Do Not Disturb, Be Right Back, and other presence indicators.

See "Using Contact Center Chat with Skype for Business".

1.11. Terms and definitions

This section includes terms that may not be applicable to your software licensing level.

Abandoned call

An abandoned call is a call that the caller ends before the call is answered.

Account Code

Account Codes are classifiers that can be applied to call records and used to identify unique attributes about the caller or call for individual departments, projects, or services to generate reports on them. As well, they can be used by agents as classification codes for incoming calls. Account codes can be verified, non-verified, fixed length, or forced.

See Classification Codes, Fixed Length Account Codes, Forced Account Codes, Non-Verified Account Codes, Verified Account Codes.

ACD (Automatic Call Distribution)

ACD (Automatic Call Distribution) is a call distribution mechanism that distributes calls to a pool of available queue members.

ACD (state)

ACD is a state applied to a queue member while they are handling an ACD call.

ACD calls handled

See Calls Handled.

ACD calls interflowed

See Interflowed.

ACD calls offered

See Calls offered.

ACD calls requeued

See Calls requeued.

ACD handling time

ACD handling time is a parameter for MiContact Center Business that provides the sum of all events from answer to hang up of an ACD call.

ACD path

An ACD path is a predefined route that a call follows before reaching an agent. ACD paths direct callers to the agents or agent groups best suited to handle the calls. For example, a contact center can have an ACD path for sales, which routes callers to the agents taking sales orders.

Active Directory

Active Directory is a directory service created by Microsoft that is used for managing a domain. In MiContact Center Business, Active Directory is synchronized with YourSite Explorer to align Active Directory security groups and users with MiContact Center Business employees and employee groups within selected organizational units.

Agent

An agent is a contact center employee, assigned an Agent ID, who receives calls routed to ACD paths.

Agents available

Agents available is a real-time statistic indicating the current number of agents who are logged in and not in Make Busy or Do Not Disturb. If an agent is configured as a part of an agent group and is logged in, the agent is counted as available, even if they are not present in that agent group. This statistic can be used as a queue condition in IVR Routing.

ANI (Automatic Number Identification)

ANI (Automatic Number Identification) is a service that provides receivers of telephone calls with the caller information. ANI can be used to create screen pops for agents or to route calls by caller phone numbers.

Answered by

Answered by is the real-time name for the number of calls answered by the first, second, third, and fourth answer points

Answering points

An answering point is a single point of communication available to callers where they can contact a contact center, such as a queue, voice mail, or extension.

ASA

See Average Speed of Answer

Average Speed of Answer

Average speed of answer (ASA) is an ACD statistic that measures how long the average caller waits on hold before the call is picked up by a queue member (including time in queue and ringing time).

Average abandon time

The average abandon time is the average number of seconds callers wait in queue before they abandon a call.

Blocked call

A blocked call is a call that is unable to get into the contact center's telephone system because there are no trunks available. The caller receives a busy signal.

Busy hour

Busy hour is a statistic that highlights the busiest hour of operation of a business day.

Call abandoned parameter

The Call abandoned parameter is a queue configuration that defines short abandoned calls, determining what abandoned calls are included as abandoned in call statistics. The default the short abandon is configured at 6 seconds.

Call routing

Call routing is the set of instructions configured in Mi Contact Center Business to automate the movement of calls to their intended answering points.

Call type

Call type categorizes calls queue members receive, enabling them to be looked up in SMDR Inspector. Call types include ACD or Non ACD, abandoned, interflowed, requeued, unavailable, or outbound.

Callback

Callback is an optional feature of telephone systems that enables callers who are unable to reach an agent in a contact center to be called back by the contact center. Mi Contact Center Business and IVR Routing offer several methods of providing callbacks, including Call me back, voice callbacks, web callbacks, and abandon callbacks.

Calls abandoned

Calls abandoned is a report field detailing the total number of calls that abandoned in queue or while the phone was still ringing at an extension. Calls abandoned ignores calls that were abandoned before the short abandoned parameter had been passed.

See Abandoned calls.

Calls abandoned (long)

Calls abandoned (long) are abandoned calls where the caller hung up after the short abandon parameter had been passed. By default, the short abandon is configured to be 6 seconds.

Calls abandoned (short)

Calls abandoned (short) are abandoned calls where the caller hung up before the short abandon parameter had been passed and are not included in the call statistics.

Calls answered

See Calls handled.

Calls handled

A handled call is a call that has been picked up answered by a queue member. A call that listens to in-queue RAD messages is not considered handled until it is answered by a queue member.

Calls interflowed

See Interflowed.

Calls offered

1) Calls offered are all calls received, regardless of how they are handled or routed, including calls handled and both short and long abandoned calls.
2) Calls offered is a forecasting parameter used to determine the queue member requirement for a contact center's Service Level percent and Service Level time targets through applying the Erlang C equation to the estimated Call Load and average ACD Handling Time.

Calls requeued

Requeued calls are all calls replaced back into the same queue and offered to another agent when an agent receives an ACD call and fails to answer it after a pre-configured duration or number of rings.

Calls waiting

Calls waiting is the number of callers in a queue waiting for a queue member to become available, including those listening to Music on hold or queue announcements.

Camp on

Camp on is a notification tool that enables callers to notify an employee, who is currently on a call, that they are waiting to be answered. The employee is notified by a series of audible beeps.

Classification codes

Classification codes are classifiers appended to calls to categorize them, enabling reporting to examine specific categories of calls, such as those relating to specific products or services.

Clustered environment

A clustered environment is a network environment where multiple telephone systems are linked together to function as a single system.

Computer Telephony Integration

Computer Telephony Integration (CTI) are technologies that merge computer functions and telephone systems, enabling PC-based telephone systems to deliver functions such as synchronized voice and data delivery, voice and data conferencing, automatic information retrieval for calls, caller-based messaging and routing, and desktop productivity tools.

CTI

See Computer Telephony Integration

Customer Relationship Management

Customer Relationship Management (CRM) is a model for customer management that relies on technology to streamline and manage interactions with customers.

Date stamp

See Date/Time stamp.

Date/Time stamp

A date/time stamp is an indicator attached to a record or statistic detailing when it was created.

Delayed call

A delayed call is a call placed in the ACD queue because it cannot be immediately answered by a queue member. The ACD queue allows the client to wait for an available member rather than blocking the client from entering the system.

Dialable number

The dialable number is a digit or series of digits dialed by a caller to reach an answering point, such as an a queue member, an extension, a queue, or voice mail.

Dialed Number Identification Service (DNIS)

Dialed Number Identification Service (DNIS) is a telecommunication service that identifies the phone numbers dialed by inbound callers. DNIS can be used to route calls, enabling contact centers managing multiple product lines or businesses to direct calls to the appropriate endpoint.

Division

A division is a grouping of several employee or extension groups that enable a single report to be run for several groups simultaneously.

DND

See Do Not Disturb (state).

DNIS

See Dialed Number Identification Service.

Do Not Disturb (state)

Do Not Disturb (DND) is a state that prevents queue members from receiving inbound interactions and transfers. For agents, Do Not Disturb is an employee-level configuration. When an employee is in Do Not Disturb, they enter Do Not Disturb across all agent capabilities.

Employee

An employee is a person who is employed by an organization and configured as an employee in MiContact Center Business so that they have access to MiContact Center Business applications and may have their associated devices reported on.

Enterprise

An enterprise is both the single site where the Enterprise Server is installed and all the connected branch offices that comprise a company.

Enterprise Server

The Enterprise Server is the central server upon which MiContact Center Business is installed and from which MiContact Center Business runs.

Erlang

An Erlang is a unit of measure for telephone traffic equal to one hour or 3,600 seconds of telephone interaction, such as a single call lasting one hour or six calls lasting 10 minutes.

Erlang B

Erlang B is an equation used to estimate the number of trunks required by a contact center.

Erlang C

Erlang C is a forecasting equation that uses historical Call Load data, Service Level Percentage, Service Level Time, and Wrap up Time Used to predict the resources required to keep wait times within a contact center ‘s Service Level objective for the time interval and data range selected in a forecast.

External Hot Desking Agent

See Hot Desking Agent.

Extension

An extension is an endpoint for answering calls. Extensions can be assigned to Ring Groups., or can be logged into by agents.

Fixed Length Account Codes

Fixed Length Account Codes are verified and non-verified Account Codes that are automatically submitted to the system when the correct number of digits has been entered.

Forced Account Codes

Forced Account Codes are verified and non-verified account codes that must be entered at a specific time in a call. Forced verified account codes must be entered as soon as the phone is off the hook. Forced non-verified Account Codes must be entered after the phone number is dialed. Systems may be configured to avoid the requirement of entering a forced non-verified Account Code when making a call that must not be charged (for example, dialing a leading digit such as 8 to make a call without entering an Account Code and dialing a leading digit such as 9 to make a call that requires an Account Code).

Grade of service

The grade of service (GOS) is a measure of the likelihood of an attempted call receiving a busy signal. GOS compares the number of trunks to the level of traffic and expresses the result as a decimal fraction. A GOS of P.02, for example, indicates that a caller would have a two percent chance of receiving a busy signal.

Handled by

Handled by is the real-time statistic for the number of calls answered by the first, second, third, and fourth answer points.

Handled %

Handled % is the real-time statistic comparing the calls handled to the calls offered.

Handling time

Handling time is the measure of how long a call took to be handled by a queue member, from when the call is answered when the call is finished. Handling time includes talk time, hold time, as well as transfers and conferences on the call.

Hot Desking Agent

Hot Desking Agents are employees configured with a Hot Desking Agent ID that enables them to sit at any extension in a network and log on to that extension with all their regular work settings available. External Hot Desking Agents can hot desk remotely using any phone or headset.

Hunt group

A hunt group is a series of telephone lines grouped by the telephone system that rotates incoming calls through the lines until an available line is found and the caller is connected.

Inbound

Inbound is a descriptive term applied to forms of interaction or communication, such as a phone call, to indicate that it is being sent to a contact center from an external source.

Inbound calls

See Inbound.

Interflowed

Interflow is a mechanism that redirects interactions from queues to alternate answering points (for example, to another queue or to voicemail). Interflow statistics include interactions manually transferred from one queue to another. Interactions routed from queues to other answering points before the Short Abandon time are not included in Interflow statistics.

Interactive Voice Response

Interactive Voice Response (IVR) is a technology that enables callers to interact with a contact center's phone system by pressing keys or speech recognition while following IVR dialog.

Internal calls

Internal calls are calls made from within a system to other answering points within the same system.

LAN

A Local Area Network (LAN) connects multiple computers together over short distances. LANs typically operate within a building. The computers share information, applications, and peripherals, such as printers.

Logged on

Logged on is an agent state applied to agents who have signed into the ACD system.

Logged off

Logged off is an agent state applied to agents who have signed out of the ACD system.

Longest waiting

Longest waiting is the duration, in minutes and seconds, of the call that has been waiting the longest in queue.

Make Busy (state)

Make Busy is an agent presence state applied to prevent an agent who is busy from receiving ACD calls. Agents in Make Busy are able to receive Non ACD calls. Make Busy is an employee-level configuration. When an employee is in Make Busy, they enter Make Busy across all agent capabilities.

Media servers

A media server is a server or system, such as a telephone system, used to organize and distribute communications throughout a contact center.

MiTAI

MiTAI is a Mitel implementation of TAPI that is used to connect the telephone system/PCs running windows to external applications, such as ACD controllers.

Mitel OPS Manager

Mitel OPS Manager is a Mitel software application that provides network-wide administration and maintenance for MiVoice Business and 3300 Network Elements or Nodes.

Non ACD (state)

Non ACD is a state applied to queue members involved in an incoming personal contact, a member-originated call, or a call dialed directly to their extension.

Non-verified Account Codes

Non-verified Account Codes are numbers entered onto the SMDR record for billing and call management. During a call, non-verified Account Codes can be entered as often as required.

Outbound calls

Outbound calls are calls made from within a contact center to external answering points.

Overflow

Overflow is a call distribution mechanism that queues calls against two or more agent groups to limit the delay faced by callers. If a call in an ACD queue is not answered after the configured Overflow time, then it is placed into the queue of a second agent group in addition to the first queue.

PBX

See Telephone system.

Pooling principle

The pooling principle refers to the increased contact center efficiency gained by consolidating contact center resources.

Port

A port is a communications endpoint in MiContact Center Business used to link services.

Probability of delay

The probability of delay is a statistic that measures the likelihood of a call being delayed in the ACD queue, comparing the number of queue members to the level of traffic carried by the trunks.

PSTN

See Public Switched Telephone Network.

Public Switched Telephone Network (PSTN)

The Public Switched Telephone Network is a global collection of Central Offices (CO) interconnected by long distance telephone switching systems.

Quality of service

Quality of service is a reflection of an agent's ability to provide excellent assistance to each customer. Quality of service can be evaluated and managed through silent monitoring systems, IT support systems, CTI, ANI, and DNIS.

Queue number

A queue number is the address of a queue or other answering point used in the telephone system. The programming associated with the queue number defines the routing and timing options available to the call.

Queue member

A queue member is an individual answering for the queue. For ACD paths, ‘members’ refers to agents in the queue’s answering agent groups. For Ring Groups, ‘members’ refers to the extensions assigned to the queue’s Ring Groups.

Queue unavailable

1) Queue unavailable is a routing option that reroutes calls to an unavailable answer point/overflow point. Queues are unavailable when the call enters the system outside business hours, when all queue members have removed their presence, when all queue members are in DND, or when the queue has been placed in DND. Calls interflowed before the Short Abandon time are included in Queue Unavailable statistics.
2) Queue unavailable is a real-time statistic that counts how many calls were re-rerouted to other queues due to the queue being unavailable.

RAD

See Recorded Announcement Device.

Readerboard

See Wall sign.

Real-time adherence

Adherence refers to whether or not agents are performing the activities for which they are scheduled. Workforce management tools enable supervisors to be notified of discrepancies between agents' work schedules and the actual activities they perform.

Reason Code

Reason codes are descriptive classifiers applied to Make Busy and Do Not Disturb states to provide more detailed information as to why the queue member applied the code.

Recorded Announcement Device

Recorded Announcement Device is an IVR Routing feature that provides prerecorded messages to callers waiting in the ACD queue.

Reporting number

A reporting number is the unique number assigned by the system to contact center resources for reporting purposes.

Ring Group

A Ring Group is a collection of extensions, or a single dialing point for a collection of extensions, in a business. Ring Groups are typically used to reach back office extensions. For example, a business with agents taking sales orders may also have several phone extensions in the warehouse. These warehouse phone extensions are compiled into a Ring Group, which can be reached via a single dialing point.

Service Level percent

The Service Level percent is the number of calls that are handled, abandoned, and interflowed before the Service Level time, compared to the total number of calls handled, abandoned, and interflowed.

Service Level time

The Service Level time is the specified time used in calculating the queue service objective in conjunction with the Service level percent, such as 80% (Service Level percent) of interactions answered within 120 seconds (Service Level time).

Silent monitoring

Silent monitoring is a MiContact Center Business feature that facilitates the tracking of agent extension call handling techniques by enabling supervisors to listen to the voice interactions of internal or external calls between agents and callers.

Site

A site is a physical location of a contact center with one or more media servers. It may be the same location where the Enterprise Server is installed or a branch office.

Spectrum

Spectrum is a reporting feature configured for queues that provides a frequency distribution of calls abandoned, answered, or interflowed based on a defined time scale.

SQL

SQL is a standard query language used to enter, query, and change data in a database, as well as create and administer databases. Administration of YourSite Explorer is done using Microsoft's SQL Server.

Subroutines

Subroutines are portions of workflows that can be reused in multiple workflows.

Talk time

Talk time is the measure of the time an employee agent spends talking to callers, excluding time spent on hold.

TCP/IP

TCP/IP is the basic communication protocol of the Internet and is used as a communication protocol in private networks (intranets).

Telephone system

A telephone system is a private branch exchange (PBX) or business telephone switch used to process incoming and outgoing calls to a contact center.

Time to answer

Time to answer is the measure, in seconds, of how long an incoming call remained in queue before it was answered. It is primarily used as an SMDR data mining criteria.

Time stamp

See Date/Time stamp.

True talk time

See Talk Time.

Trunk

A trunk is a communication line between two telephone systems.

Trunk load

Trunk load is the duration of time from when a trunk receives a call to when the queue member finishes handling the call and disconnects. Trunk load does not include Wrap Up Time.

Unavailable

Unavailable is an agent and employee state real-time column in Contact Center Client that includes agents unavailable to take calls due to being in Do Not Disturb, Make Busy, Work Timer, Reseize Timer, or Unknown.

Updated Position in Queue (UPiQ)

Updated Position in Queue (UPiQ) is a notification feature that provides messages to callers informing them of their position in queue and keeps them informed of their position if it changes, at preset intervals.

UPiQ

See Updated Position in Queue.

Verified Account Codes

Verified Account Codes are numbers entered before making a call to change the Class of Service or Class of Restriction at the station. When the call ends, the station returns to normal. Verified Account Codes can be tracked with SMDR for long-distance billing purposes and may be reported in Internal SMDR logs.

Wall board

See Wall sign.

Wall sign

A wall sign is an electronic sign used to display real-time ACD statistics to employees in a contact center.

WAN

Wide Area Network (WAN) connects multiple computers over a wide geographic area. WANs operate over telephone carrier lines through bridges or routers. Router options enable communication between high speed LAN links and slower speed WAN links, which tie LAN segments together.

Whisper Coach

Whisper Coach is a silent monitor feature that enables supervisors to converse with and coach agents handling calls without callers hearing the supervisor.

Workflow

Workflows are programed pathways in IVR Routing and Multimedia Contact Center, which control how interactions are routed to queue members.

Workforce management

Workforce management is the scheduling of contact center agents to meet forecasted resource requirements and the managing of agents to ensure they adhere to their scheduled activities.

Wrap Up Time

Wrap Up Time is a real-time and reporting statistic detailing the total time an agent spends in the Work Timer state.