Administering Avaya Contact Center Select

Release 6.4
Issue 01.02
December 2014

© 2014 Avaya Inc.

All Rights Reserved.

Notice

While reasonable efforts have been made to ensure that the information in this document is complete and accurate at the time of printing, Avaya assumes no liability for any errors. Avaya reserves the right to make changes and corrections to the information in this document without the obligation to notify any person or organization of such changes.

Documentation disclaimer

“Documentation” means information published by Avaya in varying mediums which may include product information, operating instructions and performance specifications that Avaya may generally make available to users of its products and Hosted Services. Documentation does not include marketing materials. Avaya shall not be responsible for any modifications, additions, or deletions to the original published version of documentation unless such modifications, additions, or deletions were performed by Avaya. End User agrees to indemnify and hold harmless Avaya, Avaya's agents, servants and employees against all claims, lawsuits, demands and judgments arising out of, or in connection with, subsequent modifications, additions or deletions to this documentation, to the extent made by End User.

Link disclaimer

Avaya is not responsible for the contents or reliability of any linked websites referenced within this site or documentation provided by Avaya. Avaya is not responsible for the accuracy of any information, statement or content provided on these sites and does not necessarily endorse the products, services, or information described or offered within them. Avaya does not guarantee that these links will work all the time and has no control over the availability of the linked pages.

Warranty

Avaya provides a limited warranty on Avaya hardware and software. Refer to your sales agreement to establish the terms of the limited warranty. In addition, Avaya’s standard warranty language, as well as information regarding support for this product while under warranty is available to Avaya customers and other parties through the Avaya Support website: http://support.avaya.com or such successor site as designated by Avaya. Please note that if You acquired the product(s) from an authorized Avaya Channel Partner outside of the United States and Canada, the warranty is provided to You by said Avaya Channel Partner and not by Avaya.

Licenses

THE SOFTWARE LICENSE TERMS AVAILABLE ON THE AVAYA WEBSITE, HTTP://SUPPORT.AVAYA.COM/LICENSEINFO OR SUCH SUCCESSOR SITE AS DESIGNATED BY AVAYA, ARE APPLICABLE TO ANYONE WHO DOWNLOADS, USES AND/OR INSTALLS AVAYA SOFTWARE, PURCHASED FROM AVAYA INC., ANY AVAYA AFFILIATE, OR AN AVAYA CHANNEL PARTNER (AS APPLICABLE) UNDER A COMMERCIAL AGREEMENT WITH AVAYA OR AN AVAYA CHANNEL PARTNER. UNLESS OTHERWISE AGREED TO BY AVAYA IN WRITING, AVAYA DOES NOT EXTEND THIS LICENSE IF THE SOFTWARE WAS OBTAINED FROM ANYONE OTHER THAN AVAYA, AN AVAYA AFFILIATE OR AN AVAYA CHANNEL PARTNER; AVAYA RESERVES THE RIGHT TO TAKE LEGAL ACTION AGAINST YOU AND ANYONE ELSE USING OR SELLING THE SOFTWARE WITHOUT A LICENSE. BY INSTALLING, DOWNLOADING OR USING THE SOFTWARE, OR AUTHORIZING OTHERS TO DO SO, YOU, ON BEHALF OF YOURSELF AND THE ENTITY FOR WHOM YOU ARE INSTALLING, DOWNLOADING OR USING THE SOFTWARE (HEREINAFTER REFERRED TO INTERCHANGEABLY AS “YOU” AND “END USER”), AGREE TO THESE TERMS AND CONDITIONS AND CREATE A BINDING CONTRACT BETWEEN YOU AND AVAYA INC. OR THE APPLICABLE AVAYA AFFILIATE (“AVAYA”).

Avaya grants You a license within the scope of the license types described below, with the exception of Heritage Nortel Software, for which the scope of the license is detailed below. Where the order documentation does not expressly identify a license type, the applicable license will be a Designated System License. The applicable number of licenses and units of capacity for which the license is granted will be one (1), unless a different number of licenses or units of capacity is specified in the documentation or other materials available to You. “Software” means computer programs in object code, provided by Avaya or an Avaya Channel Partner, whether as stand-alone products, pre-installed on hardware products, and any upgrades, updates, patches, bug fixes, or modified versions thereto. “Designated Processor” means a single stand-alone computing device. “Server” means a Designated Processor that hosts a software application to be accessed by multiple users. “Instance” means a single copy of the Software executing at a particular time: (i) on one physical machine; or (ii) on one deployed software virtual machine (“VM”) or similar deployment.

License type(s)

Concurrent User License (CU). End User may install and use the Software on multiple Designated Processors or one or more Servers, so long as only the licensed number of Units are accessing and using the Software at any given time. A “Unit” means the unit on which Avaya, at its sole discretion, bases the pricing of its licenses and can be, without limitation, an agent, port or user, an e-mail or voice mail account in the name of a person or corporate function (e.g., webmaster or helpdesk), or a directory entry in the administrative database utilized by the Software that permits one user to interface with the Software. Units may be linked to a specific, identified Server or an Instance of the Software.

Heritage Nortel Software

“Heritage Nortel Software” means the software that was acquired by Avaya as part of its purchase of the Nortel Enterprise Solutions Business in December 2009. The Heritage Nortel Software currently available for license from Avaya is the software contained within the list of Heritage Nortel Products located at http://support.avaya.com/LicenseInfo under the link “Heritage Nortel Products” or such successor site as designated by Avaya. For Heritage Nortel Software, Avaya grants You a license to use Heritage Nortel Software provided hereunder solely to the extent of the authorized activation or authorized usage level, solely for the purpose specified in the Documentation, and solely as embedded in, for execution on, or for communication with Avaya equipment. Charges for Heritage Nortel Software may be based on extent of activation or use authorized as specified in an order or invoice.

Copyright

Except where expressly stated otherwise, no use should be made of materials on this site, the Documentation, Software, Hosted Service, or hardware provided by Avaya. All content on this site, the documentation, Hosted Service, and the product provided by Avaya including the selection, arrangement and design of the content is owned either by Avaya or its licensors and is protected by copyright and other intellectual property laws including the sui generis rights relating to the protection of databases. You may not modify, copy, reproduce, republish, upload, post, transmit or distribute in any way any content, in whole or in part, including any code and software unless expressly authorized by Avaya. Unauthorized reproduction, transmission, dissemination, storage, and or use without the express written consent of Avaya can be a criminal, as well as a civil offense under the applicable law.

Third Party Components

“Third Party Components” mean certain software programs or portions thereof included in the Software or Hosted Service may contain software (including open source software) distributed under third party agreements (“Third Party Components”), which contain terms regarding the rights to use certain portions of the Software (“Third Party Terms”). As required, information regarding distributed Linux OS source code (for those products that have distributed Linux OS source code) and identifying the copyright holders of the Third Party Components and the Third Party Terms that apply is available in the products, Documentation or on Avaya’s website at: http://support.avaya.com/Copyright or such successor site as designated by Avaya. You agree to the Third Party Terms for any such Third Party Components.

Preventing Toll Fraud

“Toll Fraud” is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or is not working on your

company's behalf). Be aware that there can be a risk of Toll Fraud associated with your system and that, if Toll Fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya Toll Fraud intervention

If You suspect that You are being victimized by Toll Fraud and You need technical assistance or support, call Technical Service Center Toll Fraud Intervention Hotline at +1-800-643-2353 for the United States and Canada. For additional support telephone numbers, see the Avaya Support website: http://support.avaya.com or such successor site as designated by Avaya. Suspected security vulnerabilities with Avaya products should be reported to Avaya by sending mail to: securityalerts@avaya.com.

Downloading Documentation

For the most current versions of Documentation, see the Avaya Support website: http://support.avaya.com, or such successor site as designated by Avaya.

Contact Avaya Support

See the Avaya Support website: http://support.avaya.com for product or Hosted Service notices and articles, or to report a problem with your Avaya product or Hosted Service. For a list of support telephone numbers and contact addresses, go to the Avaya Support website: http://support.avaya.com (or such successor site as designated by Avaya), scroll to the bottom of the page, and select Contact Avaya Support.

Trademarks

Avaya, the Avaya logo, Avaya one-X® Portal, Avaya Aura® Communication Manager, Avaya Aura® Experience Portal, Avaya Aura® Orchestration Designer, Avaya Aura® Session Manager, Avaya Aura® System Manager, and Application Enablement Services are either registered trademarks or trademarks of Avaya Inc. in the United States of America and/or other jurisdictions.

All non-Avaya trademarks are the property of their respective owners. Linux® is the registered trademark of Linus Torvalds in the U.S. and other countries.

Contents

Chapter 1: Introduction ... 14
Purpose ... 14
Intended audience ... 14
Related resources ... 14
Documentation ... 14
Viewing Avaya Mentor videos ... 15
Support ... 16
Chapter 2: Avaya Contact Center Select overview ... 17
Avaya Contact Center Select users ... 18
Sample data ... 19
Chapter 3: Contact Center Manager Administration initial operation ... 20
Configuring Internet Explorer ... 20
Logging on to Contact Center Manager Administration ... 22
Logging off Contact Center Manager Administration ... 22
Changing a user password ... 22
Opening the Connection Status window ... 23
Using the Audit Trail ... 24
Starting the CCMM Administration utility ... 24
Part 1: Reporting supervisor users ... 25
Chapter 4: Real-time reporting ... 25
Launching the Contact Center Status real-time display ... 25
Creating a private real-time display ... 27
Applying custom formulas to real-time displays ... 28
Printing a real-time display ... 29
Deleting a private display ... 29
Logging out an agent from a real-time display ... 30
Changing an agent's Ready status from a real-time display ... 30
Viewing the non-staffed skillsets ... 31
Chapter 5: Filter management ... 32
Creating a filter in Real-time reporting ... 32
Adding skillset elements to a filter ... 33
Adding application elements to a filter ... 33
Adding agent elements to a filter ... 34
Removing elements from a filter ... 35
Deleting a filter ... 35
Applying filters to real-time tabular displays ... 35
Applying filters to graphical displays ... 36
Applying supervisor-reporting agent combinations to real-time displays ... 37
Removing filters from a real-time display ... 38

Chapter 6: Exported displays ... 39
Exporting real-time displays ... 39
Viewing an exported real-time display ... 39
Changing the file name prefix of exported real-time display grids ... 40
Chapter 7: Graphical displays ... 41
Adding a graphical display ... 41
Opening a graphical display ... 42
Deleting a graphical display ... 42
Creating a Real-time Dashboard display ... 43
Adding charts to the Real-time Dashboard ... 44
Changing chart properties in the Real-time Dashboard display ... 44
Removing display charts from the Real-time Dashboard display ... 45
Saving the Real-Time Dashboard display ... 45
Configuring an agent map ... 46
Arranging agents in an agent map using drag and drop ... 47
Customizing the agent map layout ... 48
Zooming in or out on an agent map display ... 48
Activate a display from an agent map ... 49
Activate an agent details window from an agent map ... 49
Configuring a billboard display ... 50
Configuring a chart display ... 51
Creating a private collection ... 52
Creating a private billboard collection ... 53
Configuring a Time Line display ... 54
Chapter 8: Real-time report customization ... 56
Adding a new column to a real-time display ... 56
Customizing display properties ... 56
Changing the refresh rate of a real-time display ... 57
Changing the font size in a real-time display grid ... 57
Changing the color settings of a real-time display grid ... 58
Changing column names ... 58
Changing the column width in a real-time display ... 59
Rearranging columns in a real-time display ... 60
Changing the data collection mode of a real-time display ... 60
Changing the title of a real-time display grid ... 61
Deleting columns from a real-time display ... 61
Moving the chart contents within the window ... 62
Rotating a summary chart ... 62
Increasing or decreasing the summary chart size ... 62
Zooming in on areas of a summary chart ... 63
Chapter 9: Contact Center Management fundamentals ... 64
Force Agent Log out and Change Agent Status ... 64
Chapter 10: Agents ... 67

Editing agent details.... 67
Logging out multiple agents from the Agents list.... 68
Logging out an agent from the Agent Details screen.... 68
Chapter 11: Historical Reporting.... 70
Logging on to Historical reporting.... 70
Opening a public, private, or shared report.... 71
Running an Ad hoc report.... 72
Defining the selection criteria.... 73
Exporting an Ad hoc report.... 74
Creating a shared or private report.... 75
Defining the report output.... 76
Importing a report.... 78
Editing a report.... 79
Printing an Ad hoc report.... 81
Scheduling a report.... 81
Printing a report schedule.... 84
Activating a scheduled report.... 84
Deactivating a scheduled report.... 85
Running a report from a different time zone.... 86
Deleting a report.... 86
Chapter 12: Emergency Help.... 88
Starting the Emergency Help display.... 88
Printing an Emergency Help display.... 88
Exporting an Emergency Help display.... 89
Viewing an exported Emergency Help display.... 89
Deleting an exported Emergency Help display.... 90
Chapter 13: Contact Center Configuration fundamentals.... 91
Synchronizing data to IP Office manually.... 91
Chapter 14: Activity codes.... 93
Configuring activity codes.... 94
Editing an activity code.... 96
Deleting an activity code.... 97
Searching for an activity code.... 98
Chapter 15: Contact types.... 99
Editing a contact type.... 99
Chapter 16: Skillsets.... 102
Viewing skillsets.... 102
Chapter 17: Threshold classes.... 103
Viewing threshold classes.... 103
Part 2: Administrator users.... 104
Chapter 18: Contact Center Configuration fundamentals.... 104
Synchronizing data to IP Office manually.... 105

Editing a server ... 105
Refreshing your servers ... 106
Chapter 19: Skillsets ... 107
Skill-based routing ... 107
Out of service skillsets ... 107
Contacts in queue ... 108
Agent selection ... 108
Contact selection ... 108
To queue to a default skillset ... 109
Activity codes ... 109
Adding a skillset ... 109
Chapter 20: CDNs (Route Points) ... 111
Configuring and acquiring a CDN (route point) ... 111
Configuring and acquiring an Open Queue CDN (route point) ... 113
Acquiring multiple configured CDNs (Route Points) ... 115
Deacquiring a CDN (route point) ... 115
Deleting a CDN (route point) ... 116
Deacquiring all CDNs (Route Points) ... 116
Chapter 21: Activity codes ... 118
Configuring activity codes ... 119
Editing an activity code ... 121
Deleting an activity code ... 122
Searching for an activity code ... 123
Chapter 22: Call presentation classes ... 124
Creating a call presentation class ... 124
Deleting a call presentation class ... 126
Chapter 23: Threshold classes ... 128
Display thresholds ... 128
Pegging thresholds ... 128
Editing a threshold class ... 128
Variable definitions ... 129
Chapter 24: Routes ... 131
Configuring and acquiring routes ... 131
Chapter 25: Multiplicity presentation classes ... 133
Creating a multiplicity presentation class ... 133
Deleting a multiplicity presentation class ... 136
Chapter 26: Contact types ... 137
Editing a contact type ... 137
Chapter 27: Global settings ... 140
Configuring global settings ... 140
Chapter 28: Historical statistics ... 143
Integrated Reporting ... 143

Configuring Historical statistics.... 143
Chapter 29: Real-time statistics.... 145
Configuring real-time statistics collection.... 145
Chapter 30: Dialed number identification services.... 148
Configuring a DNIS.... 148
Variable definitions.... 149
Chapter 31: Formulas.... 151
Creating a custom formula.... 151
Editing or viewing formulas.... 154
Chapter 32: Media servers.... 155
Verifying the media server details.... 155
Chapter 33: Contact Center Management fundamentals.... 157
Force Agent Log out and Change Agent Status.... 158
Chapter 34: Agents.... 160
Adding an agent.... 160
Adding a Supervisor/Agent.... 164
Creating an agent/supervisor assignment.... 166
Deleting an agent.... 167
Logging out multiple agents from the Agents list.... 167
Logging out an agent from the Agent Details screen.... 168
Modifying agent details.... 169
Copying agent properties.... 170
Searching for agents.... 171
Searching for agents by skillset.... 172
Chapter 35: Skillset assignments.... 174
Creating a skillset assignment.... 174
Chapter 36: Assignments.... 177
Assignment types.... 177
Agent-to-supervisor assignment scenarios.... 178
Agent-to-skillset assignment scenarios.... 178
Canceling a scheduled assignment.... 179
Creating a reset assignment.... 179
Creating a supervisor assignment.... 180
Running an assignment immediately.... 181
Assigning agents to skillsets.... 182
Assigning agents to supervisors.... 183
Copying an assignment.... 184
Deleting an assignment.... 185
Viewing a scheduled assignment.... 186
Chapter 37: Configuration Tool procedures.... 187
Prerequisites to Configuration Tool procedures.... 187
Downloading a Configuration Tool spreadsheet.... 187

Entering data in a Configuration Tool spreadsheet..... 188
Validating data in a Configuration Tool spreadsheet..... 189
Correcting invalid entries in a Configuration Tool spreadsheet..... 190
Uploading data from a Configuration Tool spreadsheet..... 190
Recording the upload results..... 191
Downloading data to a Configuration Tool spreadsheet..... 192
Chapter 38: Prompt Management 194
Adding a Content Group..... 195
Adding or updating a Media Prompt..... 195
Chapter 39: Real-time reporting..... 197
Launching the Contact Center Status real-time display..... 197
Creating a private real-time display..... 199
Making a public copy of a private real-time display..... 200
Applying custom formulas to real-time displays..... 201
Printing a real-time display..... 201
Deleting a private display..... 202
Logging out an agent from a real-time display..... 202
Changing an agent's Ready status from a real-time display..... 203
Viewing the non-staffed skillsets..... 204
Chapter 40: Filter management..... 205
Creating a filter in Real-time reporting..... 205
Adding skillset elements to a filter..... 206
Adding application elements to a filter..... 206
Adding agent elements to a filter..... 207
Removing elements from a filter..... 208
Deleting a filter..... 208
Applying filters to real-time tabular displays..... 208
Applying filters to graphical displays..... 209
Applying supervisor-reporting agent combinations to real-time displays..... 210
Removing filters from a real-time display..... 211
Chapter 41: Exported displays..... 212
Exporting real-time displays..... 212
Viewing an exported real-time display..... 212
Changing the file name prefix of exported real-time display grids..... 213
Chapter 42: Graphical displays..... 214
Adding a graphical display..... 214
Opening a graphical display..... 215
Deleting a graphical display..... 215
Creating a Real-time Dashboard display..... 216
Adding charts to the Real-time Dashboard..... 217
Changing chart properties in the Real-time Dashboard display..... 217
Removing display charts from the Real-time Dashboard display..... 218
Saving the Real-Time Dashboard display..... 218

Making a public copy of a graphical display.... 219
Assigning threshold alerts to a real-time display.... 220
Configuring an agent map.... 220
Arranging agents in an agent map using drag and drop.... 222
Customizing the agent map layout.... 222
Zooming in or out on an agent map display.... 223
Activate a display from an agent map.... 223
Activate an agent details window from an agent map.... 224
Configuring a billboard display.... 224
Configuring a chart display.... 225
Creating a private collection.... 227
Creating a private billboard collection.... 228
Creating a public collection or public billboard collection.... 229
Configuring a Time Line display.... 229
Chapter 43: Real-time report customization.... 232
Adding a new column to a real-time display.... 232
Customizing display properties.... 232
Changing the refresh rate of a real-time display.... 233
Changing the font size in a real-time display grid.... 233
Changing the color settings of a real-time display grid.... 234
Changing column names.... 234
Changing the column width in a real-time display.... 235
Rearranging columns in a real-time display.... 236
Changing the data collection mode of a real-time display.... 236
Changing the title of a real-time display grid.... 237
Deleting columns from a real-time display.... 237
Moving the chart contents within the window.... 238
Rotating a summary chart.... 238
Increasing or decreasing the summary chart size.... 238
Zooming in on areas of a summary chart.... 239
Chapter 44: Historical Reporting.... 240
Logging on to Historical reporting.... 240
Opening a public, private, or shared report.... 241
Running an Ad hoc report.... 242
Defining the selection criteria.... 243
Exporting an Ad hoc report.... 244
Creating a shared or private report.... 245
Defining the report output.... 246
Importing a report.... 248
Editing a report.... 249
Printing an Ad hoc report.... 251
Scheduling a report.... 251
Printing a report schedule.... 254

Activating a scheduled report.... 254
Deactivating a scheduled report.... 255
Running a report from a different time zone.... 256
Deleting a report.... 256
Chapter 45: Access and Partition Management fundamentals.... 258
Chapter 46: Access classes.... 259
Creating an access class.... 259
Editing an access class.... 260
Assigning an access class to a user.... 260
Viewing the users assigned to an access class.... 261
Deleting an access class.... 262
Chapter 47: Report groups.... 263
Public report groups versus user-defined report groups.... 263
Creating a report group.... 264
Deleting a report group.... 265
Chapter 48: Standard partitions and reporting agents.... 266
Reporting agents.... 267
User types.... 267
Users.... 268
Reporting agents and standard partition example.... 268
Result in real-time reporting.... 269
Result in historical reporting.... 269
Result in Contact Center Management.... 269
Assigning a standard partition to a user.... 269
Viewing the users assigned to a partition.... 271
Editing user properties.... 272
Removing a partition from a user.... 274
Chapter 49: User-defined partitions.... 276
Partition properties.... 276
Creating a user-defined partition.... 278
Editing a user-defined partition.... 281
Assigning a user-defined partition to a user.... 281
Deleting a user-defined partition.... 282
Chapter 50: Contact Center Manager Administration users.... 283
Creating a Contact Center Manager Administration user.... 283
Copying the properties of an existing Contact Center Manager Administration user.... 287
Deleting a Contact Center Manager Administration user.... 288
Assigning supervisor/reporting agent combinations to a user.... 288
Configuring a supervisor/agent.... 290
Chapter 51: Outbound configuration.... 294
About Outbound Campaign Manager Tool.... 294
Daily Start and Stop Times.... 295

Outbound capacity management.... 296
Logging on to Contact Center Manager Administration for Outbound.... 296
Defining campaign settings.... 297
Adding a time zone.... 301
Updating a time zone.... 302
Deleting a time zone.... 303
Importing call data from a text file.... 303
Importing call data from an ODBC database.... 305
Importing call data from an existing campaign.... 306
Adding call data manually.... 307
Validating a telephone number or code.... 308
Inserting text.... 308
Removing text.... 309
Replacing text.... 310
Splitting a phone number.... 311
Adding area and international codes.... 311
Checking the length of fields.... 312
Checking for alphabetic characters.... 313
Checking for a value.... 314
Checking for duplicate call data.... 315
Checking customer matches.... 316
Comparing call data with the Do Not Call list.... 317
Assigning skillsets to outbound campaign calls.... 318
Printing a summary of a new campaign.... 318
Activating a campaign.... 319
Adding call data to an existing campaign.... 320
Changing campaign settings.... 320
Pausing a campaign.... 321
Canceling a campaign.... 322
Restarting a campaign.... 322
Monitoring campaign progress and results.... 323
Printing a summary of an existing campaign.... 324
Creating a new agent script.... 324
Creating an agent script from an existing script.... 326
Adding a disposition code.... 327
Updating a disposition code.... 329
Deleting a disposition code.... 329
Closing a contact with a disposition code.... 330
Including UTF-8 characters in exported data.... 331
Exporting campaign call data.... 331
Exporting manually entered call data.... 332
Exporting campaign summary data.... 333
Viewing log files.... 334

Chapter 52: Emergency Help..... 336
Starting the Emergency Help display..... 336
Printing an Emergency Help display..... 336
Exporting an Emergency Help display..... 337
Viewing an exported Emergency Help display..... 337
Deleting an exported Emergency Help display..... 338
Appendix A: Default sample data..... 339

Chapter 1: Introduction

Purpose

This guide describes the tasks that administrators and supervisors of Avaya Contact Center Select can perform in Contact Center Manager Administration.

Intended audience

This guide is for personnel who administer and customize the Avaya Contact Center Select solution.

Related resources

Documentation

The following table lists the documents related to Avaya Contact Center Select. Download the documents from the Avaya Support site at http://support.avaya.com.

Title	Use this document to:	Audience
Overview		
Avaya Contact Center Select Solution Description	This document provides a technical description of Avaya Contact Center Select. It describes the product features, specifications, licensing, and interoperability with other supported products.	• Sales engineers • Implementation engineers • Solution architects
Implementing		
Deploying Avaya Contact Center Select DVD	This document contains information about Avaya Contact Center Select DVD installation, initial configuration, and verification. This document contains information about maintaining and	• Sales engineers • Implementation engineers

Title	Use this document to:	Audience
	troubleshooting the Avaya Contact Center Select server.	
Deploying Avaya Contact Center Select Software Appliance	This document contains information about Avaya Contact Center Select Software Appliance (VMware OVA) preparation, deployment, initial configuration, and verification. This document contains information about maintaining and troubleshooting the software appliance.	• Sales engineers • Implementation engineers
Deploying Avaya Contact Center Select Hardware Appliance	This document contains information about Avaya Contact Center Select Hardware Appliance (physical server) installation, initial configuration, and verification. This document contains information about maintaining and troubleshooting the hardware appliance.	• Sales engineers • Implementation engineers
Avaya Contact Center Select Business Continuity	This document contains information about deploying Avaya Contact Center Select Business Continuity.	• Sales engineers • Implementation engineers
Using		
Administering Avaya Contact Center Select	This document contains information and procedures to configure the users, skillsets, and contact center configuration data. This document contains information about creating Avaya Contact Center Select real-time and historical reports.	• System administrators • Contact center supervisors
Avaya Contact Center Select Advanced Administration	This document contains information about managing the Avaya Contact Center Select server, licensing, and multimedia configuration.	• System administrators
Upgrading and patching Avaya Contact Center Select	This document contains information about upgrading and patching Avaya Contact Center Select.	• System administrators
Avaya Contact Center Select Agent Desktop Guide	This document provides information and procedures for agents who use Agent Desktop to accept, manage, and close contacts of all media types in Avaya Contact Center Select.	• Contact center agents

Viewing Avaya Mentor videos

Avaya Mentor videos provide technical content on how to install, configure, and troubleshoot Avaya products.

About this task

Videos are available on the Avaya Support website, listed under the video document type, and on the Avaya-run channel on YouTube.

Procedure

- To find videos on the Avaya Support website, go to http://support.avaya.com and perform one of the following actions:
  - In **Search**, type `Avaya Mentor Videos` to see a list of the available videos.
  - In **Search**, type the product name. On the Search Results page, select **Video** in the **Content Type** column on the left.
- To find the Avaya Mentor videos on YouTube, go to www.youtube.com/AvayaMentor and perform one of the following actions:
  - Enter a key word or key words in the Search Channel to search for a specific product or topic.
  - Scroll down Playlists, and click the name of a topic to see the available list of videos posted on the website.

Note:

Videos are not available for all products.

Support

Go to the Avaya Support website at http://support.avaya.com for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Chapter 2: Avaya Contact Center Select overview

Avaya Contact Center Select is a context-sensitive, collaborative, voice and multimedia customer experience solution that allows small to midsize enterprises to anticipate, accelerate, and enhance customer interactions. Avaya Contact Center Select uses the Avaya IP Office telephone system to provide a real-time telephony platform. Avaya IP Office is a flexible and scalable phone system designed specifically for small and midsize enterprises. IP Office supports a wide range of phones and devices for use in contact centers.

Avaya Contact Center Select provides a feature rich voice and multimedia solution with integrated routing and reporting for the small to midsize enterprises. Voice-enabled agents and agent-supervisors created in Avaya Contact Center Select are automatically added to the IP Office platform. Avaya Contact Center Select synchronizes agent and agent-supervisor details from Avaya Contact Center Select to the IP Office platform.

Avaya Contact Center Select supports the following routed contact types:

- Voice
- Email
- Outbound
- Web communications (Web chat)
- SMS text messages
- Fax messages
- Scanned documents
- Voice mail messages

Avaya Contact Center Select also supports peer-to-peer Instant Messaging. To support the email-based contact types, you must add an email server to your solution. To support the Web communications contact type, you must add a Web communications server to your solution.

Contact Center Manager Administration (CCMA) is a Web browser-based tool for Avaya Contact Center Select administrators and supervisors to manipulate the data and reporting for the contact center database. You can use Contact Center Manager Administration to configure contact center resources, contact flows, components, and activities. You can also use Contact Center Manager Administration to define access levels to data and provide dynamic reporting to fit your business needs.

Avaya Contact Center Select provides a simplified voice prompt management utility. The contact center supervisor can perform prompt management work without requiring administrator access to

the Avaya Contact Center Select server. Avaya Contact Center Select provides a number of status monitoring utilities to monitor the integration points with the IP Office software.

User Data Synchronization

Avaya Contact Center Select provides unified administration for contact center agents and IP Office users. The users (agents and agent-supervisors) that you configure in Avaya Contact Center Select are automatically mirrored to the connected IP Office.

When you create an agent in Avaya Contact Center Select, a matching user account is created in IP Office.

When you modify agent details in Avaya Contact Center Select, the corresponding IP Office user details are automatically updated. If you delete an agent in Avaya Contact Center Select, the corresponding IP Office user is not deleted.

Synchronization works in one direction — from Avaya Contact Center Select to IP Office. The IP Office administrator can manually force a data synchronization from Avaya Contact Center Select.

Avaya Contact Center Select users

Avaya Contact Center Select includes two types of users in Contact Center Manager Administration: an administrator user and a supervisor user. By default, Contact Center creates one administrator user and two supervisor users. Contact Center assigns the appropriate access classes and partitions to the created accounts.

A supervisor user can perform only a subset of the tasks an administrator can perform. These tasks include:

- Assigning agents to skillsets
- Changing the supervisor of an agent
- Creating and editing activity codes
- Viewing existing real-time reports
- Making private copies of real-time reports
- Launching Emergency Help
- Running historical reports
- Using the Audit Trail

A supervisor user has limited options available to them in Contact Center Manager Administration. The administrator can choose to edit the access classes and partitions assigned to a supervisor user.

The administrator performs advanced configuration tasks in Contact Center Manager Administration, in addition to the tasks listed above.

This guide describes the tasks a supervisor user and an administrator user can perform. For more information, see Part 1: Reporting supervisor users on page 25 or Part 2: Administrator users on page 104.

Sample data

Avaya Contact Center Select provides sample data to minimize the time and effort needed to validate basic contact center operation. You can also use the sample data as the initial configuration for your solution. When you log on to Contact Center Manager Administration for the first time, the following sample data is visible in the Management and Configuration components:

- Two sample supervisors, each created as a supervisor/agent. Contact Center creates a local Windows user account on the server linked to each supervisor/agent.
- Eight sample agents, each assigned to one of the two sample supervisor/agents. Contact Center creates a local Windows user account on the server linked to each agent.
- One sample Agent Skillset Assignment and one sample Agent Supervisor Assignment.
- A sample skillset for each supported contact type. Avaya Contact Center Select assigns each sample agent to the voice skillset.
- Sample Activity codes, After Call Work Item codes, and Not Ready Reason codes.
- A sample CDN (Route Point) number for voice calls.
- A sample Open Queue Route Point for multimedia contacts.
- Three sample Call Presentation Classes.
- Two sample Multiplicity Presentation Classes. With Multiplicity Presentation Classes, agents can handle more than one contact type concurrently.
- One sample Route to provide music on a customer call.
- Three sample Threshold Classes with preconfigured values. Threshold Classes determine how real-time and historical reports display statistics.

Using CCMA Prompt Management, administrators can manage prompts on Avaya Media Server (Avaya MS). Contact Center provides a number of sample prompts and sample music that administrators can use in your Orchestration Designer flow applications to treat Contact Center calls. Contact Center also provides sample Orchestration Designer flow applications that use the sample prompts and music provided, in addition to the standard Orchestration Designer flows available previously. All the sample prompts have an associated variable that exists in Orchestration Designer. This allows the administrator to modify the prompts within the flow applications without opening Orchestration Designer.

Contact Center uses the sample CDN (Route Point) number to deliver calls to the sample Customer_Service flow application. The Customer_Service flow application provides sample treatments and routes the call to a sample agent.

The sample data provided allows you to make a first routed call in your contact center. It also serves as your initial configuration and allows you to rapidly commission your Avaya Contact Center Select solution. To view the lists of sample data that Avaya Contact Center Select provides, see Default sample data on page 339.

Chapter 3: Contact Center Manager Administration initial operation

This chapter describes the initial procedures to log on and operate Contact Center Manager Administration (CCMA). The procedures in this chapter apply to both administrator and supervisor users.

Configuring Internet Explorer

About this task

Configure Internet Explorer to access Contact Center Manager Administration.

Install Microsoft Internet Explorer 8.0, 9.0, 10.0, or 11.0 (32 bit version only). Contact Center Manager Administration supports only the 32 bit version of Microsoft Internet Explorer.

Note:

You must run Internet Explorer in compatibility mode for Contact Center Manager Administration.

Procedure

1. Start Internet Explorer.
2. From the menu, select **Tools** > **Internet Options**.
3. In the **Internet Options** dialog box, click the **Security** tab.
4. Click the **Trusted Sites** icon.
5. Click **Custom Level**.
6. In the **Security Settings** dialog box for trusted sites, under the **.NET Framework-reliant components** heading, select **Enable** for the following:
   - **Run components not signed with Authenticode**
   - **Run components signed with Authenticode**
7. Under the **ActiveX controls and plug-ins** heading, select **Enable** for the following:
   - **Automatic prompting for ActiveX controls**
   - **Download signed ActiveX controls**

- **Run ActiveX Controls and plug-ins**
- **Script ActiveX Controls marked safe for scripting**

8. Under the **Downloads** heading, select **Enable** for the following:
   - **Automatic prompting for file downloads**
   - **File download**
9. Under the **Miscellaneous** heading, for **Allow script-initiated windows without size or position constraints**, select **Enable**.
10. Under the **Miscellaneous** heading, for **Allow websites to open windows without address or status bars**, select **Enable**.
11. Under **Reset custom settings**, from the **Reset to:** list select **Medium-low**.
12. Click **Reset**.
13. On the Warning dialog box, click **Yes**.
14. Click **OK**.
15. If you enabled ActiveX options, when a message appears asking you to confirm your choice, click **Yes**.
16. Click the **Trusted Sites** icon.
17. Click **Sites**.
18. In the **Trusted sites** dialog box, clear the **Require server verification {https:} for all sites in this zone** check box.
19. In the **Add this Web site to the zone** box, type the server name (not the IP address) for your Avaya Contact Center Select server.
20. Click **Add**.
21. Click **Close** to return to the **Internet Options** dialog box.
22. Click the **Privacy** tab.
23. In the **Pop-up Blocker** section, select the **Block pop-ups** check box.
24. Click **Settings**.
25. In the **Pop-up Blocker Settings** dialog box, in the **Address of website to allow** box, type the Avaya Contact Center Select server URL, http://<server name>/, where <server name> is the name of the Avaya Contact Center Select server.
26. Click **Add**.
27. Click **Close**.
28. In the **Internet Options** dialog box, click the **Advanced** tab.
29. Under **Browsing**, clear the **Reuse windows for launching shortcuts** check box.
30. Click **OK** to exit the **Internet Options** dialog box.
31. Restart Internet Explorer to activate your changes.

Logging on to Contact Center Manager Administration

About this task

Log on to CCMA to configure and administer your contact center resources.

You can log on to CCMA for the first time as an administrator or a supervisor. For security reasons, Avaya highly recommends that you change the default password when you first log on to the application. Passwords must be at least 8 characters long and no more than 20 characters long, and include at least 1 number, at least 1 uppercase letter, at least 1 lowercase letter, and no spaces.

For information on the default administrator and supervisor accounts and passwords, see Default sample data on page 339.

Procedure

1. Start Internet Explorer.
2. In the **Address** box, type the URL of the Avaya Contact Center Select server. The default URL is `http://<server name>`, where *<server name>* is the computer name of the Avaya Contact Center Select server.
3. Press **Enter**.
4. In the main logon window, in the **User ID** box, type the user name.
5. In the **Password** box, type the password.
6. Click **Log In**.

Logging off Contact Center Manager Administration

About this task

Log off Contact Center Manager Administration when you want to exit Contact Center Manager Administration.

Procedure

On the Contact Center Manager Administration Launchpad, click **Logout**.

Changing a user password

About this task

Change a default user password in CCMA for security reasons. Avaya highly recommends that you change default passwords. Passwords must be at least 8 characters long and no more than 20 characters long, and include at least 1 number, at least 1 uppercase letter, at least 1 lowercase letter, and no spaces.

Procedure

1. Start Internet Explorer.
2. In the **Address** box, type the URL of the Avaya Contact Center Select server. The default URL is `http://<server name>`, where *<server name>* is the computer name of the Avaya Contact Center Select server.
3. Press **Enter**.
4. In the main logon window, click **Change Password**.
5. In the **Change Password** window, in the **User ID** box, type the name of the user account to change.
6. In the **Old password** box, type the old password.
7. In the **New password** box, type the new password.
8. In the **Confirm password** box, retype the new password.
9. Click **Submit**.

Opening the Connection Status window

Before you begin

- Log on to Contact Center Manager Administration.

About this task

Open the Connection Status window to display a list of servers currently administered by CCMA, along with the local time and connection status of each server.

Procedure

1. On the CCMA launchpad, click a component.
2. From the **Status** menu, choose **Connection Status**.

   A green dot beside the server indicates that it is online and operational. A red dot indicates that the server is off-line or not responding. A brown dot indicates that the server is in grace period.
3. In the CCM Server Connection Status window, click **Refresh** to refresh the status and local time of all the servers listed.
4. Click **Close**.

Using the Audit Trail

Before you begin

- Log on to Contact Center Manager Administration.

About this task

Use the Audit Trail to view a list of actions performed in Contact Center Management, Access and Partition Management, Historical Reporting, Scripting, Configuration, and Prompt Management as well as the user ID of the person who made the changes.

You can also monitor when a user logs on or logs off of Contact Center Manager Administration.

Procedure

On the Contact Center Manager Administration Launchpad, click **Audit Trail**.

Starting the CCMM Administration utility

About this task

Use this procedure to log on to the CCMM Administration utility. You use the CCMM Administration utility to configure and maintain multimedia resources. For information about using CCMM Administration to configure and maintain multimedia resources, see *Avaya Contact Center Select Advanced Administration*.

Procedure

1. Log on to Contact Center Manager Administration as an administrator.
2. On the Launchpad, click **Multimedia**.
3. In the left pane, select the CCMM server to administer.

   The system displays the Multimedia Administration screen in the right pane.
4. Select **Install prerequisite software**.
5. Click **Launch Multimedia Client**.
6. On the **File Download** box, click **Run**.

   The prerequisite software takes some time to install. After the install, the CCMM Administration utility appears.

Comments? infodev@avaya.com

Part 1: Reporting supervisor users

This part of the guide describes all of the tasks that Avaya Contact Center Select default supervisor users can perform in Contact Center Manager Administration.

Chapter 4: Real-time reporting

The Contact Center Manager Administration (CCMA) Real-Time Reporting displays provide up-to-date statistics for your contact center and resources. With access to statistics that update in real-time, such as the number of contacts waiting to be answered, the number of agents assigned to each skillset, and the number of abandoned calls, you can view changes in contact activity as they occur.

Contact Center can present real-time data in the most appropriate format - graphical, tabular, or a combination of both. This allows supervisors to react immediately to changing circumstances, adjust skillsets and staffing levels, or reroute calls to other resources. Real-Time Reporting displays make it easy to monitor peak periods and adjust staffing levels as appropriate to maintain the highest levels of customer service.

Launching the Contact Center Status real-time display

About this task

Access Avaya Contact Center Select Real-Time Reporting and launch the Contact Center Status real-time display. Use the displays to monitor the performance of the contact center in near real-time.

Avaya Contact Center Select offers a number of sample public real-time displays. Create a private copy of these displays and experiment with them to create displays that meet the day-to-day requirements of your solution.

For example, the CC Status public graphical display has the following panels:

Panel	Type	Description
CC_Standard_Agent_Display (CC)	Tabular	This tabular panel displays the agent status and time in current state. Use this panel to monitor individual agent activity.

Panel	Type	Description
CC_Contacts_Wait	Chart	This pie chart displays the number of contact waiting for each skillset.
CC_Standard_Application_Display	Tabular	This tabular panel displays the maximum wait times, and the number of contacts offered, waiting, answered, or abandoned.
CC_Sample_Skills	Chart	This panel displays the service level for each skillset.

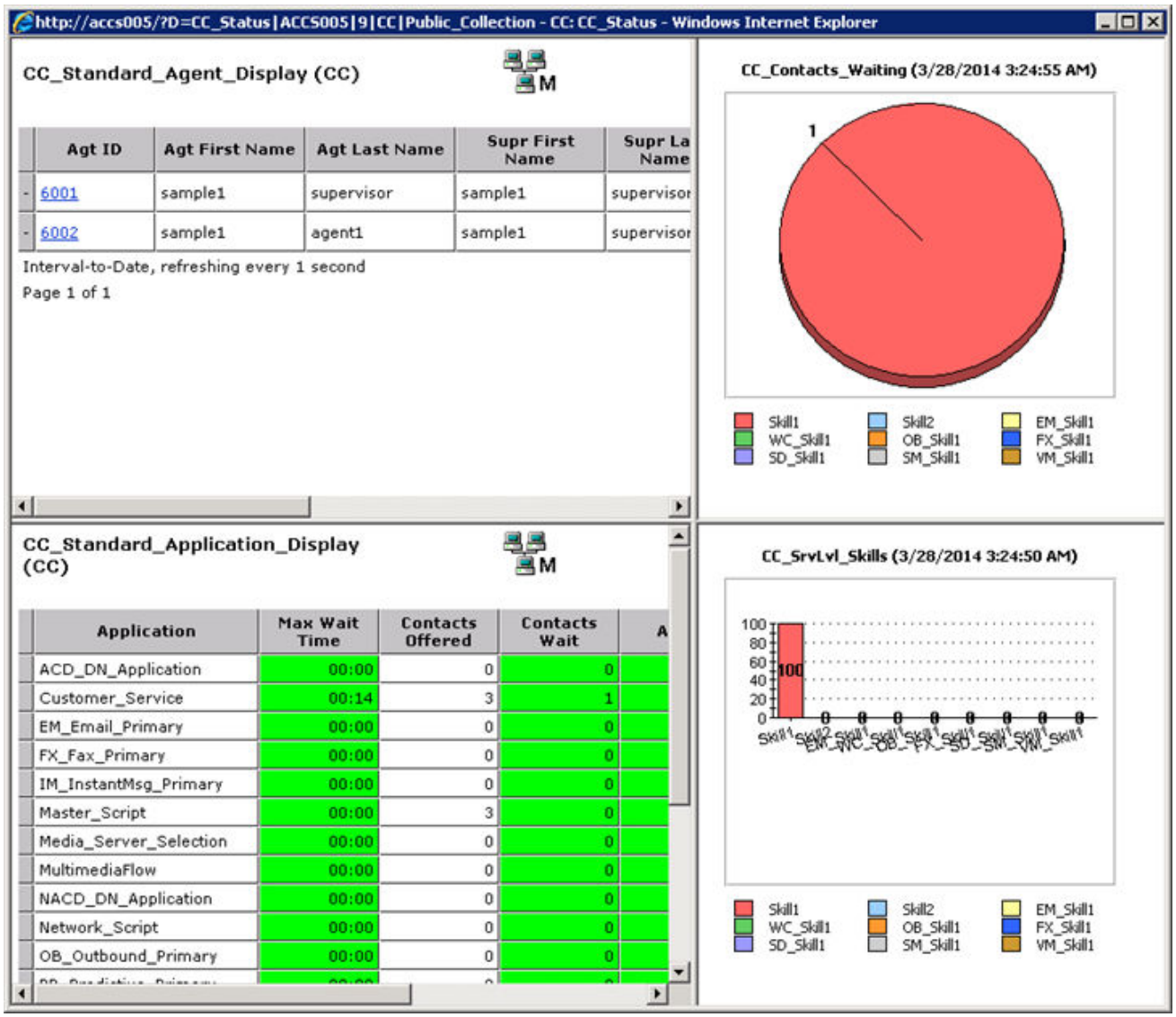
This combined display provides a real-time status report about important Avaya Contact Center Select performance parameters.

Procedure

1. Log on to Contact Center Manager Administration.
2. On the Contact Center Manager Administration **Launchpad**, click **Real-Time Reporting**.
3. In the left pane, select the **Public Graphical Displays** folder.
4. In the left pane, from the list of displays, select **CC_Status**.
5. On the **Public Collection properties** tab, select the default display options for CC Status. These standard displays combine to form an effective Real-Time Reporting graphical display.
6. Click **Launch**.

   The Contact Center Status real-time display appears.
7. Use the display to monitor contact center performance in near real-time.
8. Experiment with Real-Time Reporting to find, copy, or create a set of displays that meets your solution requirements.

Example of the Contact Center Status real-time display



Creating a private real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Create a private real-time display to customize real-time displays.

Procedure

1. In the left pane, select the **Public Tabular Displays** folder under the **CC** server.
2. From the expanded **Public Tabular Displays** folder, select the display to copy.
3. In the Public Display window, type the name of your new private display. You can use only alphanumeric characters in the display name; do not use special characters.

   When you copy a display, the system gives the new display a default name in the format `[server name]_[display name]`. Since each private display must have a unique name, you must type a new name, if you save a public display with the same default name. If you do not type a new name, the system overwrites the existing display.
4. To save the display in the **Private Tabular Displays** folder, click **Make Private Copy**.
5. On the Properties page, you can change the colors, font size, and the refresh rate.

Applying custom formulas to real-time displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

After you create custom formulas in the Formula Editor, apply them to your private real-time displays in the Real-Time Reporting component.

You can customize only the columns in private displays. If you choose a public display, you must first copy and save it in your Private Displays folder before you can customize the columns.

Procedure

1. Select the **Private Tabular Displays** folder under the **CC** server.
2. Click the display to customize.
3. Click the **Columns** tab.
4. From the **Available Fields** list, select the formula to add to the real-time display.
5. Click **Add Field**.
6. Click **Submit** to save your changes.
7. Click **Launch Display** to view your changes.

Comments? infodev@avaya.com

Printing a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

If you require a hard copy, you can print a real-time display.

Procedure

1. In the left pane, navigate to the real-time display that you want to print.
2. Click **Launch Display**.
3. On the real-time display window, click **Print**.
4. In the Print dialog box, from the **Printer Name** list, select the desired printer.
5. Click **Print**.

Deleting a private display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- At least one private display must exist.

About this task

Delete private tabular displays and private graphical displays.

Note:

Once you delete a display, you cannot recover it.

Procedure

1. In the left pane, select the **CC** server.
2. Click the **Private Tabular Displays** folder to delete a private tabular display.

   OR

   Click the **Private Graphical Displays** folder to delete a private graphical display.
3. In the selected folder, click the private display to delete.
4. In the right pane, click **Remove Private Display** to delete a private tabular display.

   OR

   Click **Remove Display** to delete a private graphical display.
5. In the Confirmation dialog box, click **OK**.

The system permanently deletes the display.

Logging out an agent from a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Customize a private real-time display to include the Logout column, or select a previously customized display.

About this task

Use this procedure to log out an agent from a real-time display.

Procedure

1. In the left pane, select an Agent Display that has the Logout column and shows the agent you want to log out.
2. In the right pane, click **Launch Display**.

   CCMA opens the real-time display window.
3. Scroll to the agent that you want to log out.
4. Click the **Force Log out** button ( ).
5. On the **Logout Confirmation** dialog, click **Yes**.

   Contact Center logs out the agent, and displays a message on the agent's Agent Desktop interface informing them that a supervisor has logged them out.

Changing an agent's Ready status from a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Customize a private real-time display to include the Change State column, or select a previously customized display. For more information, see Real-time report customization on page 56.

About this task

Use this procedure to change an agent's status from a real-time display.

Procedure

1. In the left pane, select an Agent Display that has the Change State column and shows the agent whose status you want to change.
2. In the right pane, click **Launch Display**.

Comments? infodev@avaya.com

CCMA opens the real-time display window.

3. Scroll to the agent for whom you want to change the ready status.
4. Click the **Change State** button (/).

   CCMA displays the **Change Agent State Confirmation** dialog.
5. If you changed the agent's status from Ready to Not Ready, on the **Change Agent State** dialog, enter a Not Ready Reason code, and click **Yes**.

   Contact Center displays a message on the agent's Agent Desktop interface informing them of the state change.
6. If you changed the agent's status from Not Ready to Ready, on the **Change Agent State** dialog click **Yes**.

   Contact Center displays a message on the agent's Agent Desktop interface informing them of the state change.

Viewing the non-staffed skillsets

About this task

Use the Non-Staffed Skillsets window to view a list of all the skillsets within your partition, without logged-on agents. Unlike the real-time display from which you launch this window, the list of non-staffed skillsets does not refresh automatically. Instead, you must manually refresh the list to obtain the most recent information.

Procedure

1. Log on to the **Real-Time Reporting** component.
2. In the left pane, click the relevant server and then click the folder that contains the skillset display.
3. Click the skillset display that you want to launch.
4. In the right pane click **Launch Display**

   The display launches.
5. In the display, click **Non-Staffed Skillsets**.

   The Non-Staffed Skillsets window appears, listing all of the skillsets within your partition, without logged-on agents.
6. Click **Refresh**.

Chapter 5: Filter management

In Avaya Contact Center Select, you can create skillset, application, and agent filters for real-time reporting. You can configure filters with a combination of the three data types.

Use filters to specify the skillset, application, and agent data that you want to see in the realtime displays. In the Filters window, configure the filters from all elements in the partition assigned to you. After configuring filters, you can assign the filters to your private real-time displays.

The real-time displays show subtotals of data for each filter, which are further divided into subtotals for each site that belongs to the filter.

Note:

Some statistical fields cannot be accumulated.

Creating a filter in Real-time reporting

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Ensure that you have access to filters.

About this task

Create filters to specify the skillsets, applications, and agents that you want to see in the real-time display grids, and the agents that you want to see in the agent map graphical displays.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. Right-click on the **Filters** folder and select **Add Filter**.
3. In the **New Filter Name** box, type the name of the filter. You can use only alphanumeric characters. Do not use special characters.
4. Click **Submit** to save the filter.

Adding skillset elements to a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

Add skillset elements to a filter to view the required statistics.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter to edit.
3. Select the server on which to add the elements.
4. Select the **Skillsets** tab.
5. Click the **Assign Skillsets** heading.
6. From the list, select **contains**, **is equal to**, or **starts with**.
7. In the box, type the skillset name.
8. Click **Search**.
9. In the list of available skillsets, select the check box for each skillset to add to the filter.

   OR

   To select all available skillsets, select the **Select All** check box.
10. Click **Submit** to save your changes.

Adding application elements to a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

When you select an application element to filter in billboards and charts, your new application element appears in the **Filter Selection** list under **Available**.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter to edit.
3. Select the server on which to add the elements.

4. Select the **Application** tab.
5. In the list of available applications, select the check box for each application to add to the filter.

   OR

   To choose all available applications, select the **Select All** check box.
6. Click **Submit** to save your changes.

Adding agent elements to a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

Include statistics for specific agents by adding agent elements.

When you select an application element to filter in billboards and charts, the new application element appears in the **Filter Selection** list under **Available**.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter to edit.
3. Select the server on which to add the elements.
4. Select the **Agents** tab.
5. Click the **Assign Agents** heading.
6. From the first list, select **Last Name**, **First Name**, **Department**, **Comment**, or **Login ID**.
7. From the second list, select **contains**, **is equal to**, or **starts with**.
8. In the box, type a value to search.

   You can search for up to five levels by selecting **And** or **Or** from the last list.
9. Click **Search**.

   Agents that match your criteria appear in a table.
10. In the list of available agents, select the check box for each agent to add to the filter.

    OR

    To choose all available agents, select the **Select All** check box.
11. Click **Submit** to save your changes.

Comments? infodev@avaya.com

Removing elements from a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

To modify the report display, remove elements from a filter.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter from which to remove applications, skillsets, or agents.
3. On the **Skillset**, **Application**, and **Agent** tabs, clear the check boxes for each skillset, application, or agent to remove from the filter.
4. Click **Submit** to save your changes.

Deleting a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

If you need to rename a filter, you must delete the filter and create a new one with a new name.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter to delete.
3. In the right pane, click **Delete Filter**.
4. On the message box that appears asking you to confirm your choice, click **Yes**.

Applying filters to real-time tabular displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

Use the Filters page to apply filters to customize your real-time tabular displays. You can apply a filter, a supervisor-reporting agent combination, or both.

Procedure

1. In the left pane, under the server containing the real-time display to which to apply filters, select the **Private Tabular Displays** folder.
2. Click the private display to customize.
3. Click the **Filters** tab.
4. From the list of available filters, select the check box for each filter to assign to the real-time display.

   OR

   To assign all of the available filters (and supervisor-reporting agent combinations listed, if you customize the **Standard Agent Display**), click **Select All**.
5. Click **Submit** to save your changes.
6. Click **Launch Display** to start the display and view your changes

Applying filters to graphical displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

Filters on real-time displays provide a mechanism for a supervisor to group together a number of agents, applications, or skillsets. Real-time reporting is capable of providing summary statistics for filters when they are added to a display. Filters are available for selection as an alternative to skillsets or applications on a number of the real-time reporting billboards and charts. The following displays support filters:

- Application Billboards
- Skillset Billboards
- Application Chart (statistics per application)
- Skillset Chart (statistics per skillset)
- Time Line Chart (statistics per skillset)
- Time Line Chart (statistics per application)
- Agent Map

Comments? infodev@avaya.com

Note:

Filters are not supported on dashboard displays.

Procedure

1. In the left pane, under the server containing the real-time graphical display to which you require to apply filters, select the **Private Graphical Displays** folder.
2. Click the private display to customize.
3. From the drop-down list of **Applications** or **Skillsets**, select the filter to assign to the real-time display.

   The filters are grouped together at the end of the **Applications** list or the **Skillsets** list.
4. Click **Submit** to save your changes.
5. Click **Launch** to start the display and view your changes.

Applying supervisor-reporting agent combinations to real-time displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

You can apply supervisor-reporting agent combinations to the **Standard Agent Display**.

Procedure

1. In the left pane, select the server containing the Standard Agent real-time display to which you require to apply supervisor-reporting agent combinations.
2. Select the **Private Tabular Displays** folder.
3. Click the private agent display to customize.
4. Click the **Filters** tab.
5. From the list of available supervisor-reporting agent combinations, select the check box for each supervisor to assign to the real-time display.

   OR

   To assign all the available supervisor-reporting agent combinations and all filters, click **Select All**.
6. Click **Submit** to save your changes.
7. Click **Launch Display** to start the display and view your changes.

Removing filters from a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

You can remove a filter that you do not require, to modify a real-time display.

Procedure

1. In the left pane, select the server that contains the real-time display from which to remove filters.
2. Select the **Private Tabular Displays** folder.
3. Click the display to customize.
4. Click the **Filters** tab.
5. From the list of assigned filters, clear the check box for each filter to remove from the real-time display.

   OR

   To remove all of the filters from the real-time display, click **Clear All**.
6. Click **Submit** to save your changes.

Comments? infodev@avaya.com

Chapter 6: Exported displays

The procedures in this section describe how to work with exported real-time displays.

Exporting real-time displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can export real-time displays to open the file in a new Internet Explorer window. Exporting real-time displays creates a snapshot file in HTML format.

Important:

You must carefully manage exported displays. Exported displays consume disk space on the Contact Center Manager Administration server.

Procedure

1. In the left pane, double-click the real-time display to export.
2. On the real-time display, click **Export**.
3. To open the file in a new Internet Explorer window, click **View**.

Viewing an exported real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You must view an exported real-time display, to print the display.

Procedure

1. From the **Displays** menu, select **Manage Exported Displays**.
2. In the right pane, from the list of HTML files, click the name of the file to view.

The snapshot of the real-time display grid appears in a new Internet Explorer window.

3. To print the exported grid, in **Internet Explorer**, from the **File** menu, select **Print**.
4. To view the colored rows of the real-time display, in the Print dialog box, select a color printer.
5. Click **Print**.

Changing the file name prefix of exported real-time display grids

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can choose the prefix to appear in the file name when you export the real-time display grids to the server as HTML files. An example of the prefix for the Consolidated Skillset Display is ConsolidatedSkillSet.

The exported file name includes your user name, the prefix that you select, the date and time you save the file. For example, if your user name is John, your prefix is ConsolidatedSkillSet, and you chose to export the Consolidated Skillset Display as an HTML file on April 10, 2000 at 2:45:28 p.m., the system saves it on the server as `John_ConsolidatedSkillSet_20000410_144528.htm`.

Procedure

1. In the left pane, under the **CC** server, click the **Private Tabular Displays** folder.
2. Click the display name.
3. On the Properties page, in the **Grid export prefix** box, type the prefix to appear in the HTML file name.

   Note:

   Do not include spaces in the prefix.
4. Click **Submit** to save your changes.

Comments? infodev@avaya.com

Chapter 7: Graphical displays

In the Graphical Display window, you can configure one of seven types of graphical displays:

- Billboard displays
- Chart displays
- Time Line displays
- Agent maps
- Collections
- Billboard collections
- Dashboard displays

Adding a graphical display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Create a graphical display.

Procedure

1. From the **Displays** menu, select **Add Graphical Display**.
2. In the **Name** box, type the name of the new graphical display.

   The system displays this name on the system tree.
3. From the **Server** list, select the **CC** server.
4. In the Element Type area, select the type of element corresponding to the type of graphical display that you want to create, from the following list:
   - **Agent**: Create an agent map.
   - **Application**: Create an application billboard, chart, or time line.
   - **IVR**: Create an IVR billboard, chart, or time line.
   - **Skillset**: Create a skillset billboard, chart, or time line.

- **All**: Create a dashboard, a private or public collection, a private billboard or public billboard collection.

5. In the Presentation area, select the type of graphical display to create.

   The type of chart you can create varies according to the selection you made in the Element type area.

6. Click **Edit Properties** to configure the graphical display.

   The system displays the corresponding properties window.

7. Click **Submit** to save the graphical display.

Opening a graphical display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one graphical display.

About this task

View a graphical display.

Procedure

1. In the left pane, click the folder containing the graphical display to view.
2. Click the graphical display to view.
3. In the right pane, review the current settings for the graphical display.
4. If you change the settings, click **Submit** to save your changes.
5. Click **Launch**.

   While you view an agent map or billboard graphical display, the display can change color. This change alerts you when the statistic values exceed the configured threshold values. For agent map displays, text flashes when a threshold value is reached, while you view the display in the box view (if you configure the display with this feature).

Deleting a graphical display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

When you no longer require a graphical display, you can delete the display.

Procedure

1. In the left pane, click the **Public Graphical Displays** or the **Private Graphical Displays** folder.

   Note:

   When you delete a graphical display, you cannot restore it. Instead, you must create a new graphical display.

2. In the list of displays, click the graphical display to delete.
3. In the right pane, click **Remove Display**.
4. In the message box that appears asking you to confirm your choice, click **OK**.

Creating a Real-time Dashboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can create a Real-time Dashboard display to provide you with multiple views of up-to-date statistics for your contact center and its resources. A real-time dashboard display is click-once client application that displays performance related real-time statistics. Contact Center uses Click Once Deployment technology to download and install the application from the Contact Center server.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new dashboard.

   This is the name that appears in the system tree. You can use only alphanumeric characters in the collection name, you cannot use special characters.

3. From the **Servers** list, select the **CC** server.
4. In the **Element Type** area, select **All**.
5. In the **Presentation** area, select **Dashboard**.
6. Click **Edit Properties** to configure the new collection.
7. The Collection Properties window appears.
8. In the **Dashboard title** box, accept the default name, or delete the default name and type a custom name to appear as the title of the window when the dashboard display is launched.
9. The **Install** button is enabled if the prerequisite software required to run the dashboard is not found on your computer. Click the **Install** button download and install the relevant .Net Framework.

10. Click **Submit** to save your changes.

    The new dashboard appears on the system tree under Graphical Displays.

Adding charts to the Real-time Dashboard

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a Real-time Dashboard display.

About this task

You can add charts to the Real-time Dashboard to view them.

Procedure

1. In the left pane, click the **Private Graphical Displays** folder.
2. Click the Real-time Dashboard display.
3. Click **Launch**.
4. From the **Displays** menu, select a display chart.
5. From the display chart menu, select the data to display on the chart.

   The data appears on the chart in the Real-time Dashboard display.

Changing chart properties in the Real-time Dashboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a Real-time Dashboard display.
- Add a display chart to the Real-time Dashboard.

About this task

You can change the items that appear on the charts in the Real-time Dashboard to meet your requirements.

Procedure

1. Click the **Properties** tab of the chart to change.
2. Select the skillsets, applications, and statistics to display on the chart.
3. Click the **Display** tab to display the updated chart.

Comments? infodev@avaya.com

Note:

If you choose **None** from the **Color Palette** drop-down list, in the **Display** > **Options** menu, the chart is displayed in its default color.

Removing display charts from the Real-time Dashboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a Real-time Dashboard display.
- Add a display chart to the Real-time Dashboard.

About this task

You can remove display charts from the Real-time Dashboard display.

Procedure

1. In the left pane, click the **Private Graphical Displays** folder.
2. Select the Real-time Dashboard display.
3. Click **Launch**.
4. Click the **X** button beside the display to remove the display.
5. In the message box that appears asking you to confirm your choice, click **OK**.

Saving the Real-Time Dashboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a Real-time Dashboard display.
- Add a display chart to the Real-time Dashboard.

About this task

Save the Real-time Dashboard display window size and the following attributes of each Real-time Display chart:

- size and position of the window
- display type
- list of selected statistics
- list of selected skillsets or applications

Procedure

Close the Real-time Dashboard display window and select **Yes** on the Save dialog.

OR

Select **Save** from the **File** menu.

Configuring an agent map

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure an agent map to view a representation of all the agents to whom you have access in your contact center.

Note:

You cannot log out an agent, or change an agent's status, from an agent map; these actions are possible only from tabular displays.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new agent map. This is the name that appears in the system tree. You can only use alphanumeric characters in the agent map name; you cannot use special characters.
3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **Agent**.
5. In the **Presentation** area, confirm that **Agent Map** is selected.
6. Click **Edit Properties** to configure the new agent map.

   The Agent Map Properties dialog box appears.
7. In the **Agent map** title box, type the agent map name to appear at the top of the agent map display, or accept the default name. Do not include spaces, special characters, punctuation, or the ampersand (&) in the agent map title.
8. From the **Data collection mode** list, select **Moving window** or **Interval-to-date**.
9. From the **Agent Name** list, select how you want the agent name and login ID to appear in the header of each icon in the Icon view. You can choose from the following options:
   - agent first name, followed by last name
   - agent last name, followed by first name
   - agent first name and login ID

Comments? infodev@avaya.com

- agent last name and login ID

10. From the **Linked Display** list, select the display.

    You can choose from all the private, public, and standard displays (both tabular and graphical) to which you have access to. If you choose nothing from the **Linked Display** list when you configure the agent map, the **Standard Agent Display** appears when you click **Linked Display**.

11. From the **Associated filter** list, select the agent filter to assign to the agent map.

    The filters containing agents appear.

12. In the **Threshold settings** area, click the colors to which the text in the box view agent map change, when a threshold level is exceeded.

    In the icon view, the agent icon changes to these colors when a threshold level is exceeded.

    When you choose the threshold colors, select colors that make the text easy to view against the agent state background colors in box view.

    If you do not use a mouse, press **Tab** until the status bar indicates that you have reached the desired color. After reaching the desired color, press the **Spacebar** to select the color.

13. Select the **Text Flash on threshold** check box to view the text in the launched box view.

    The agent map flashes when a threshold level is exceeded. (This option is not applicable to the **View Agent Map Displays** icon.)

14. Select the **Hide logged out Agents** check box to view logged on agents only when you activate the agent map.

    If you do not select this check box, you see all agents in the filter that you attach to the display, both logged on and logged off.

15. In the **Agent State Colors** area, select the appropriate check boxes to choose the colors to shown for each agent state.

16. Click **Submit** to save your changes.

    The new agent map appears in the system tree under **Graphical Displays**.

Arranging agents in an agent map using drag and drop

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Launch an agent map display.

About this task

Position an agent within the agent map.

Procedure

1. On the agent map display, click the agent block to move within the display.
2. While pressing the left mouse button on the agent, drag the agent to the new position within the agent map.
3. Release the mouse button to leave the agent in the new position.
4. Click **Save Layout** to save the new arrangement.

Customizing the agent map layout

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Launch an agent map display.

About this task

Adapt an agent map layout to meet your requirements.

Procedure

1. In the agent map, click and drag the agent icons to the desired position.
2. To change the size of the window, place your cursor on the edge of the window until a two-headed arrow appears.
3. Click the edge of the window, and then drag it to the desired size.
4. Click **Save Layout** to save your changes. The next time you open the agent map, your custom layout appears.
5. To rearrange the icons automatically in the window, click **Tile Agents**.

Zooming in or out on an agent map display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Launch an agent map display.

About this task

While you look at the agent map in the box view, you can resize the display to 50, 75, 125, 150, 200, or 300 percent of normal size when you use the zoom feature. The resizing option does not apply to agent maps that appear in the icon view. When you resize an agent map, the text within the agent blocks are also resized, and the relative position of the icons are maintained. To return the display to the normal size, select 100 percent from the list.

If you resize an agent map to 50 percent of the normal size, the spacing between the agent map icons is halved.

Procedure

From the **Zoom** list, select a value to resize the agent map.

Activate a display from an agent map

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Configure an agent map.

About this task

On the agent map graphical display, you can view a grid display. When you customize the agent map, you can choose which display to view when you click the **Linked Display** button. You can choose from all the private, public, and standard displays (both tabular and graphical) to which you have access.

If you do not configure which display to view with the Linked Display feature, the **Standard Agent Display** becomes the default display when you click the **Linked Display** button.

Procedure

On the agent map display, click **Linked Display**.

The display that you chose from the **Linked Display** list activates.

Activate an agent details window from an agent map

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Configure an agent map.

About this task

When you look at an agent map in box view, you can double-click the agent icons to view a separate window that lists details about the agent. The window displays the name, login ID, supervisor, position ID, and personal DN of the agent. You can double-click the agent icons in the display, for both logged on and logged off agents, to activate this details window.

Procedure

1. Launch the required agent map display.
2. Double-click an agent icon in the agent map display.

   A new window appears that lists the agent details.

Configuring a billboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure a billboard display to select a statistic to monitor closely.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new billboard graphical display. This is the name that appears in the system tree. You can use alphanumeric characters only.
3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **Application**, **IVR** or **Skillset**.
5. In the **Presentation** area, select **Billboard**.
6. Click **Edit Properties** to configure the new billboard display.
7. In the **Billboard title** box, accept the default name provided, or delete the default name and type a custom name to appear at the top of the billboard display.

   Do not include spaces, special characters, punctuation, or the ampersand (&) in the billboard title.
8. From the **Data collection mode** list, select either **Moving window** or **Interval-to-date**.
9. From the **Application** or **Skillset** list, select the application or skillset to monitor, or select **Summary**.
10. From the **Statistic** list, select the statistic to monitor in the billboard. The name of the statistic that you monitor appears in the title bar of the billboard display window when you activate it.
11. From the **Font color** boxes, select the color for the statistic.

    The background color of the billboard display is black until a threshold value is reached, at which time it changes to either of the threshold colors you selected, and the font color changes to black.

    If you do not use a mouse, press **Tab** until the status bar indicates that you have the selected color. After reaching the desired color, press the **Spacebar** to select the color.
12. From the **Threshold settings** boxes, click to select the colors for the thresholds below level 1, between level 1 and level 2, and above level 2, or accept the default colors shown.

    You can view the current Level 1 and Level 2 threshold values configured for this statistic in the Value boxes beside the threshold settings boxes.
13. Select the **Pop to front** check box to move the activated billboard to the front on your desktop when a threshold level is reached.

Comments? infodev@avaya.com

The billboard display appears in front of all open windows. On each refresh, the billboard display continues to pop to the front of all open windows, until the data on the display falls below the threshold level.

14. Click **Submit** to save your changes.

    The new billboard appears in the system tree under **Private Graphical Displays**.

Configuring a chart display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure a chart display for skillsets, applications, or statistics to monitor in a customized chart.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new chart graphical display.

   This is the name that appears in the system tree. You can use alphanumeric characters only.
3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **Application**, **IVR** or **Skillset**.
5. If you select **Application**, in the **Presentation** area, select the **Chart (choose statistics per application)** or the **Chart (choose applications per statistic)**.
6. If you select **Skillset**, in the **Presentation** area, select the **Chart (choose statistics per skillset)** or the **Chart (choose skillsets per statistic)**.
7. If you select **IVR**, in the **Presentation** area, select **Chart (choose statistics for IVR summary)**.
8. Click **Edit Properties** to configure the new chart display.
9. In the **Chart title** box, accept the default name, or delete the default name and type a custom name to appear at the top of the chart display.
10. From the **Chart type** list, select the type of chart to configure. You can choose from **Horizontal Bar**, **Vertical Bar**, or **Pie**.
11. From the **Chart fill** list, select **Color** or **Pattern (Black & White)**.
12. If you select **Chart (choose applications per statistic),** or **Chart (choose skillsets per statistic)** from the **Statistics** list, select a statistic.

13. From the **Application** list, select an application to monitor. Choose **Summary** to view a summary of all applications in your partition.
14. For **Chart (choose statistics per skillset)**, from the **Skillset** list, select a skillset to monitor.
15. Choose **Summary** to view a summary of all skillsets in your partition.

    If you select **Summary**, the total for statistics such as Agents Staffed, Agents Active, Agents Not Ready, or Agents Idle is shown as 0 because one agent is typically assigned to more than one skillset, which results in misleading totals.
16. From the **Data Collection Mode** list, select the **Moving window** or **Interval-to-date**.
17. In the **Export path** box, type the path in which to save a copy of the chart that you export as a BMP or JPG file (for example, `C:\My Documents`). If you leave this field blank, the file is exported to your desktop.
18. If you select **Chart (choose statistics per application)**, **Chart (choose statistics for IVR summary)**, or **Chart (choose statistics per skillset)**, in the **Statistic** area, select the check box for each statistic to view in the chart display.
19. If you select **Chart (choose applications per statistic)**, in the **Applications** area, select the check box for each application to view in the chart display.
20. If you select **Chart (choose skillsets per statistic)**, in the **Skillsets** area, select the check box for each application to view in the chart display.
21. To select all check boxes, click **Select All**. To clear all check boxes, click **Clear All**.
22. Click **Submit** to save your changes.

    The new chart appears in the system tree under **Graphical Displays** and the Graphical Display window refreshes.
23. To create a public copy of your custom display, in the **Type in the name of your public display** box, type a name for the public display, and then click **Make Public Copy**.

    A copy of your display appears in the **Public Graphical Displays** folder.

Creating a private collection

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure and save your favorite combination of data windows.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.

2. In the **Name** box, type the name of the new collection.

   This is the name that appears on the system tree. You can use only alphanumeric characters in the collection name; you cannot use special characters.

3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **All**.
5. In the **Presentation** area, select **Private Collection**.
6. Click **Edit Properties** to configure the new collection.

   The Private Collection Properties window appears.

7. From each display list, select a display to include in this collection.

   The display lists include all of the public displays and private displays saved on the server. You can choose a maximum of six different displays.

   You must configure the graphical displays on the server before you can include them in your collection.

8. Click **Submit** to save your changes.

   The new collection appears on the system tree under **Private Graphical Displays**.

Creating a private billboard collection

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure and save your favorite combination of billboards.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new collection or billboard collection.

   This is the name that appears on the system tree. You can use only alphanumeric characters in the collection name; you cannot use special characters.

3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **All**.
5. In the **Presentation** area, select **Private Billboard Collection**.
6. Click **Edit Properties** to configure the new collection.

   The Private Billboard Collection Properties window appears.

7. In the **Available** box, highlight each public or private billboard to include in your billboard collection, and then click the right arrow (**>**) to move the billboard to the **Selected** box.

   Private billboards are marked with an asterisk (*). You can choose from all public or private billboards on the server, up to a maximum of 25 billboards.

8. Click **Submit** to save the private billboard collection.

   The new billboard collection appears on the system tree under your **Private Graphical Displays** folder on the currently selected server.

Configuring a Time Line display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure a time line display for skillsets, applications, or IVR statistics to monitor in a customized chart.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new time line graphical display.

   This is the name that appears in the system tree. You can use alphanumeric characters only.

3. From the **Servers** list, select the **CC** server.
4. In the **Element Type** area, select **Application**, **IVR**, or **Skillset**.
5. If you select **Application**, in the **Presentation** area, select **Time Line (choose statistics per application)** or **Time Line (choose applications per statistic)**.
6. If you select **Skillset**, in the **Presentation** area, select **Time Line (choose statistics per skillset)** or **Time Line (choose skillsets per statistic)**.
7. If you select **IVR**, in the **Presentation** area, select **Time Line (choose statistics for IVR summary)**.
8. Click the **Edit Properties** button.
9. In the **Chart title** box, accept the default name, or delete the default name and type a custom name to appear at the top of the time line display.
10. From the **Chart fill** list, select **Color** or **Pattern (Black & White)**.
11. If you select **Time Line (choose applications per statistic)**, or **Time Line (choose skillsets per statistic)** from the **Statistics** list, select a statistic.
12. From the **Application** list, select an application to monitor.

Comments? infodev@avaya.com

13. Choose **Summary** to view a summary of all applications on the server.
14. For **Time Line (choose statistics per skillset)**, from the **Skillset** list, select a skillset to monitor.
15. Choose **Summary** to view a summary of all skillsets on the server.

    If you select **Summary**, the total for statistics such as Agents Staffed, Agents Active, Agents Not Ready, or Agents Idle is shown as 0 because one agent is typically assigned to more than one skillset, which results in misleading totals.
16. From the **Data Collection Mode** list, select the **Moving window** or **Interval-to-date**.
17. From the **Refresh Rate (seconds)** list, select from the available refresh rates of **1**, **5**, **10** or **30** seconds.
18. From the **Display History (minutes)** list, select from the available history values of **1**, **5**, **10** or **30** minutes.
19. In the **Export path** box, type the path in which to save a copy of the chart that you export as a BMP or JPG file (for example, `C:\My Documents`). If you leave this field blank, the file is exported to your desktop.
20. If you select **Time Line (choose statistics per application)**, **Time Line (choose statistics for IVR summary)**, or **Time Line (choose statistics per skillset)**, in the **Statistic** area, select the check box for each statistic to view in the chart display.
21. If you select **Time Line (choose applications per statistic)**, in the **Applications** area, select the check box for each application to view in the time line display.
22. If you select **Time Line (choose skillsets per statistic)**, in the **Skillsets** area, select the check box for each application to view in the time line display.
23. To select all check boxes, click **Select All**. To clear all check boxes, click **Clear All**.
24. Click **Submit** to save your changes.

    The new chart appears in the system tree under **Graphical Displays** and the Graphical Display window refreshes.
25. To create a public copy of your custom display, in the **Type in the name of your public display** box, type a name for the public display, and then click **Make Public Copy**.

    A copy of your display appears in the **Public Graphical Displays** folder.

Chapter 8: Real-time report customization

The procedures in this section describe how to customize your real-time reports. You can customize real-time report displays and real-time report summary charts.

Adding a new column to a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

When you customize your private real-time display grids, you can add new columns by choosing from a list of available statistics.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.

   The folder expands to show a list of private displays.
2. Click the display to customize.
3. Click the **Columns** tab.
4. From the **Available Fields** list, select the statistic to add to the real-time display.
5. Click **Add Field**.

   The column appears in the sample display table.
6. Click **Submit** to save your changes.

Customizing display properties

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a private real-time display.

About this task

You can customize private display properties to meet your requirements.

Procedure

1. In the left pane, click the **Private displays** folder.
2. Click the real-time display to customize.
3. On the Properties page, select your customized settings.
4. Click **Submit** to save your changes.

Changing the refresh rate of a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a private real-time display.

About this task

A slight delay occurs between the events in the contact center and the statistics that you see in the displays. The length of the delay depends on the refresh rate settings in the Real-time Statistics Multicast (RSM) component and on the application server.

The refresh rate that you specify applies to both the private real-time displays and summary charts.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the display name.
3. In the right pane, click the **Properties** tab.
4. In the **Refresh rate** box, type the rate at which to refresh data in the real-time display.

   You can specify a minimum value of 0.5 seconds or a number from 1 to 99 (seconds).
5. Click **Submit** to save your changes.

Changing the font size in a real-time display grid

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a private real-time display.

About this task

You can select the font size for the column headings and the column data in your private real-time displays.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the display name.
3. In the right pane, click the **Properties** tab.
4. In the **Column font size** boxes, type the size for the column headings and the column data. You can choose a font size from 8 to 14.

   If you make no selection, the system applies the default font size of 8.
5. Click **Submit** to save your changes.

Changing the color settings of a real-time display grid

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure the color settings for the data, filter and site subtotals, and the summary rows of the real-time display grids. If you choose no custom color, the system applies the default colors to each area.

Procedure

1. In the left pane, navigate to the real-time display.
2. In the right pane, on the **Properties** tab, in the **Color settings** area, choose the color settings to appear in the real-time display grids.
3. Click **Submit** to save your changes.

Changing column names

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can change the column names of private displays. You can customize the columns of only private displays. If you choose a public display, you must first copy it and save it in your Private Displays folder before you can customize the columns.

Comments? infodev@avaya.com

Procedure

1. In the left pane, navigate to the real-time display to customize.
2. In the right pane, click the **Columns** tab.
3. To add columns to the display, from the **Available Fields** list, select a column, and then click **Add Field**.
4. In the **Column Name** box, type the new name to appear in the real-time display grid, and then press **Tab**.

   The new column name appears in the sample table.

   You can change as many names as you want.
5. After you change the names, click **Submit** to save your changes.
6. Click **Launch Display** to view the real-time display to see your changes.

Changing the column width in a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can customize the columns of only private displays. If you choose a public display, you must first copy it and save it in your private folder before you can customize the columns.

Procedure

1. In the left pane, under the server that contains the real-time display to customize, navigate to the display.
2. In the right pane, click the **Columns** tab.
3. Click the name of the column to resize.
4. In the **Column width** box, type the width of the column in characters.

   Note:

   You cannot make the column narrower than the column text. To shrink the column to the exact width of the column heading text, type a low number of characters in the **Column width** box (for example, type 5).
5. Click **Submit** to save your changes.
6. Click **Launch Display** to start the real-time display and to view your changes.

Rearranging columns in a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can rearrange the columns only of private displays. If you choose a public display, you must first copy it and save it in your Private Tabular Displays folder before you can customize the columns.

You cannot move the Site, Filter, Skillset, or Application column headings. However, you can choose the order in which they appear in the private network-consolidated real-time displays.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the private display to customize.
3. In the right pane, click the **Columns** tab.
4. Click the name of the column to move.
5. Click **Move Left** or **Move Right** to move the column heading to the desired position.
6. Click **Submit** to save your changes.

Changing the data collection mode of a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Specify the mode in which you want to view collected contact center data.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the display name.
3. In the right pane, click the **Properties** tab.
4. From the **Data collection mode** list, select the mode in which to view the collected data.
5. Click **Submit** to save your changes.

Comments? infodev@avaya.com

Changing the title of a real-time display grid

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Select the title to appear at the top of each private real-time display grid.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the display name.
3. In the right pane, click the **Properties** tab.
4. In the **Display Title** box, type the title to appear at the top of the real-time display.

   If you do not type a title, the system applies the default title.
5. Click **Submit** to save your changes.

Deleting columns from a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- You can customize the columns of only private displays. If you choose a public display, you must first copy it and save it in your **Private Tabular Displays** folder before you can customize the columns.

About this task

When you customize your private real-time display grids, you can delete any column except for the Site, Filter, Skillset, and Application columns.

Note:

If you delete the **Answered Skillset** column, the Contact Type icons do not display in the **Contact Status** column.

Procedure

1. In the left pane, navigate to the private display to customize.
2. In the right pane, click the **Columns** tab.
3. From the sample table, click the statistic to delete from the real-time display.
4. Click **Delete**.
5. Click **Submit** to save your changes.

Moving the chart contents within the window

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can move the summary chart contents within the window frame to concentrate on specific areas of the chart.

Procedure

1. While viewing the chart, press **Shift**.
2. While pressing **Shift**, hold down both mouse buttons.
3. On the chart, move your mouse to drag the contents to the desired position.
4. Release **Shift** and the mouse buttons.
5. To restore the chart to the original state, press **R** on your keyboard.

Rotating a summary chart

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Open a summary chart.

About this task

Rotate a summary chart to view the complete content.

Procedure

1. While viewing the chart, press **Shift**.
2. While pressing **Shift**, hold down both mouse buttons.
3. Move your mouse in a circular direction.

   The chart contents rotate.

Increasing or decreasing the summary chart size

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Open a summary chart.

About this task

Customize the size of the chart contents within the chart frame. You cannot increase the size of the chart frame.

Procedure

1. While viewing the chart, press **Ctrl**.
2. While pressing **Ctrl**, hold down both mouse buttons.
3. On the chart, move your mouse upward to decrease the size of the chart contents or downward to increase the size of the chart contents.
4. After you adjust the size appropriately, release **Ctrl** and the mouse buttons.
5. To restore the chart to the original state, press **R** on your keyboard.

Zooming in on areas of a summary chart

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Open a summary chart.

About this task

Zoom in on a summary chart to view specific information.

Procedure

1. While viewing the summary chart, press **Shift**.
2. While pressing **Shift**, click and drag to select the area of the chart to view more closely.
3. Release **Shift** and the mouse button.

   The area increases in size.
4. To restore the chart to the original state, press **R** on your keyboard.

Chapter 9: Contact Center Management fundamentals

Contact Center Management contains the following main data views:

- Supervisors view
- Agents view
- Skillsets view
- Assignments view

You can use Contact Center Management to perform the following tasks:

- View users defined in Contact Center Manager Server.
- View agent-to-supervisor assignments.
- View agent-to-skillset assignments.
- View the schedule of all agent-to-skillset and agent-to-supervisor assignments.
- Assign agents to skillsets, and make supervisor changes.
- Display agent logon status in Agents, Supervisors, Skillsets, Assignments and Agent Details views.
- Force log out agents.

Force Agent Log out and Change Agent Status

The Force Agent Log out feature allows a supervisor to remotely log an agent out of Contact Center from the Contact Center Manager Administration (CCMA) user interface. This allows supervisors to log out agents who forget to log out or to go not-ready at the end of their shift.

Important:

Use the option to log out an agent only in exceptional circumstances, where there is no other option. If an agent has active contacts and a supervisor forces them to log out, Agent Desktop

shuts down: in certain scenarios this leaves their active contacts in an incorrect state. The following use cases indicate situations in which a supervisor uses the force log out feature:

- An agent falls sick at work, and transfers their current contacts, but leaves their desk without logging off. A locked screensaver prevents anyone accessing their desktop to close Agent Desktop. The supervisor forces this agent to log off, and there is no impact to customer contacts.

The supervisor can also force an agent state change to toggle it between Ready or Not Ready. When they force an agent into the Not Ready state, supervisors have the option to enter a Not Ready Reason code for the agent. The following use cases indicate situations in which a supervisor chooses to force an agent state change:

- A trainee agent goes Not Ready, entering a reason code of At_Lunch. They return from lunch but forget to reset their status to Ready. Their supervisor can see that they are at their desk, and also that they show Not Ready on the Real time Display (RTD). The supervisor uses the Change State button to make the agent Ready.
- A trainee agent leaves their desk for lunch, but forgets to set their status to Not Ready. Contacts continue to alert on their Agent Desktop. The supervisor notices that the agent is not at their desk, and that they show Ready on the RTD. The supervisor uses the Change State button to make the agent Not Ready.

When a supervisor logs out an agent, or changes the agent's status, the agent receives a notification in Agent Desktop. With normal usage of the Force Agent Log out option, this is not required, because the agent is not present at their desktop. However, if a supervisor accidentally selects the wrong agent to log out, this notification gives the agent a time period in which to gracefully complete their active contacts. This time period is configurable in Multimedia Administration. If the agent has an active voice contact, they are able to continue the call on their physical phoneset after Agent Desktop closes; where the agent is using the Agent Desktop softphone, this is not possible and the voice contact drops.

Administrators can use a new Access and Partition management setting to restrict access to the Force Agent Log out feature. A new Force Agent State Change access privilege controls access to Force Agent Log out and Change Agent State. Only supervisors who have the Force Agent State Change privelege can use the feature, and supervisors can log out or change the state of only those agents that they can see in their partition.

Supervisors access the Force Agent Log out feature either from an agent Real-Time Display (RTD) or from the Contact Center Management user interface. From the CCM interface, Force Agent Log out enables a supervisor to log out a single agent or a group of agents. Changing an agent's ready state is possible only from a Real Time Display (RTD).

The columns that display the Force Agent Log out and Change State buttons on an RTD are optional, and are not available on the standard RTDs. To use the buttons, supervisors must create a private RTD with the Change State and Logout columns included. While a supervisor can make public an RTD with these columns, supervisors viewing the public RTD cannot use the buttons if they do not have the "Force Agent State Change" access privilege.

The CCMA audit trail records both the force logout and the force state change events. The audit details the time at which the event happened, the agent that the supervisor modified, and the CCMA user id of the supervisor who carried out the action.

Chapter 10: Agents

In the Agents view, you can search for particular agents or list all agents on a server. You can also use the agents view to

- view and edit the agents' properties, including the skillsets and supervisors to which the agents are assigned
- log out an agent or multiple agents

Partly configured agents appear in the Contact Center Management Agents list with a grey agent icon.

Two types of agents are available in Contact Center Management:

- Agents
- Supervisor/agents

Editing agent details

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

Complete this procedure to edit agent details in Contact Center Management.

As a supervisor, you can change the skillsets and supervisors to which agents are assigned.

Procedure

1. From the **View/Edit** menu, select **Agent**.
2. In the left pane, click the **CC** server.

   In the right pane, the **Agents List** appears.
3. Double-click on the agent to edit.
4. Under **Agent Information**, from the **Primary Supervisor** list, select the supervisor to assign the agent to.
5. Click the **Skillsets** heading.

6. In the **Skillsets** area, click **List All** to list all skillsets configured on the server.
7. From the **Priority** list for each skillset to assign to the agent, select the priority level or select **Standby** to put the agent in standby mode for this skillset.

   Priority levels range from 1 to 48, with 1 being the highest priority for the skillset.

   Important:

   You can only assign skillsets to an agent that belongs to the same contact type.
8. Click **Submit** to save your changes.

Logging out multiple agents from the Agents list

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

Use this procedure to force log out multiple agents.

Important:

Forcing multiple agents to log out can have a detrimental effect to contact center operation. Consider this option only in exceptional circumstances where there is no alternative method of logging out these agents. If an agent has active contacts and you force them to log out, Agent Desktop closes, and this can leave their active contacts in an incorrect state.

Procedure

1. From the **View/Edit** menu, select **Agents**.
2. In the left pane, click the **CC** server.
3. In the list of agents, select each agent that you want to log off.
4. Click **Logout**.
5. On the **Message from Webpage** dialog box, click **OK**.

   Contact Center logs out the agents, and displays a message on the agents' Agent Desktop interfaces informing them that a supervisor has logged them out.

Logging out an agent from the Agent Details screen

Before you begin

- Log on to CCMA.

- Open the Contact Center Management component.

About this task

Use this procedure to force log out a single agent.

Important:

Use Force Agent Log out only in exceptional circumstances, where there is no other option to log out an agent. If an agent has active contacts and you force them to log out, Agent Desktop closes, and this can leave their active contacts in an incorrect state.

Procedure

1. From the **View/Edit** menu, select **Agents**.
2. In the left pane, click the **CC** server.
3. In the list of agents, double click the agent that you want to log off.

   CCMA displays the Agent Details screen.
4. On the **Agent Details** window, in the **Agent Information** section, check the status of the agent in the **Login Status** field.
5. Click the **Logout Agent**.
6. On the confirmation dialog box, click **Yes**.

   Contact Center logs out the agent, and displays a message on the agent's Agent Desktop interface informing them that a supervisor has logged them out.

Chapter 11: Historical Reporting

Using the Historical Reporting component, you can run and schedule performance and configuration reports. Reports help you monitor system performance by providing information about system activity. You can obtain standard reports which provide information about the past performance of the Contact Center and Contact Center configuration data. The data for historical reports is gathered from the Avaya Contact Center Select server.

Contact Center Manager Administration limits the number of scheduled reports that can run in parallel to five. Contact Center Manager Administration queues requests to run additional reports and executes these requests once a running report completes.

Note:

Avaya Contact Center Select limits the number of items shown in the document map of the Report Viewer to 5000. The document map is the navigation pane that appears on the left side of most reports. Once the limit is reached, Avaya Contact Center Select disables the document map and it is no longer visible in the Report Viewer. However, if there are multiple levels in the document map of a report, Avaya Contact Center Select removes the lowest level first and continues the removal until the number of items falls below 5000. For example, the document map for the Agent Performance report shows two items: Agent Name & ID, and the Date. If removing the Date from the document map reduces the number of items to 5000 or less, the Report Viewer displays the Agent Name & ID only. If Avaya Contact Center Select cannot reduce the number of items in the document map to 5000 or less, the document map is disabled.

Logging on to Historical reporting

Before you begin

- Ensure that you have access to Historical reporting.

About this task

To access Historical Reporting, log on to the Historical Reporting component in Contact Center Manager Administration.

Procedure

1. Log on to Contact Center Manager Administration.
2. On the **Launchpad**, click **Historical Reporting**.

The Historical Reporting window appears.

Opening a public, private, or shared report

Before you begin

- Ensure that you have access to public report groups in Access and Partition Management.
- Log on to Historical Reporting. For information, see Logging on to Historical Reporting on page 70.

About this task

Open a public, private, or shared report to view a historical report.

Procedure

1. In the left pane, select the server on which to view the list of reports.
2. Select one of the following folders:
   - **Public Report Templates**: This folder contains the standard report templates available in Avaya Contact Center Select. Run public reports on a demand basis, or save them in your Group or Private Report Templates folders and schedule the reports to run at a defined time. The Public Report Templates folder contains seven template folders corresponding to the following types of reports:
     - Agent Performance reports
     - Call-by-Call reports
     - Configuration reports
     - Contact Summary reports
     - Multimedia reports
     - Other reports
     - Outbound reports
   - **Private Report Templates**: This folder contains the report templates that you create by modifying an existing public, shared, or private report template, and saving your changes in your Private Report Templates folder. You can modify report information, schedule the report, and apply filters. For more information about creating private reports, see Creating a shared or private report on page 75.
   - **Group**: This folder contains shared report templates. When you customize a public or private report template and save it in your Group folder, all other users who have access to your group can run and schedule the group report templates.

Note:

In the Group folder, you can modify a report template only if you are the owner of the report template.

3. From the expanded list, select a report template to modify or schedule the template, or run the report on demand.

   The report properties appear in the right pane.

Running an Ad hoc report

Before you begin

- Ensure that you have access to the report folder that contains the report to run.
- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can specify the amount of data to include in an Ad hoc report by choosing the data range and applying selection criteria. After you customize your report, click **Run Now** to generate the report immediately. In the resulting Ad-hoc Report Viewer window, you can choose to print or save the report.

You can select the data range for agent performance and call-by-call reports before you generate them. You cannot select the data range for configuration reports.

Procedure

1. In the left pane, select the server that contains the report to run.
2. In the expanded list, select the folder that contains the report template to run.
3. Click the folder containing the report to run.
4. Select the report template to run.
5. To view the current report properties, in the right pane, click the following headings:
   - **Report Details**
   - **Selection Criteria**
   - **Data Range**
   - **Schedule**
   - **Output Options**: This section applies only if you previously scheduled the report.
6. To run the report with the current properties, proceed to step 8.

Comments? infodev@avaya.com

Note:

If you do not define the selection criteria, the system enforces partition rules to generate the report.

7. To define the selection criteria and the data range, see Defining the selection criteria on page 73.
8. To save your properties, in the **Save As** box, type a report name, choose a save location, and then click **Save Report**.
9. Click **Run Now** to generate the report.

Defining the selection criteria

Before you begin

- Log on to Historical Reporting.

About this task

You can select the elements to include in your reports by assigning filter elements to your reports. For example, in an agent performance report, you can choose the agents for whom to generate the report. You can define the selection criteria for public, private, and shared reports that you schedule or run on demand.

By default, if you do not define the selection criteria, the system applies partition rules to generate the report. However, if you select a filter element, you see only that element in the report. You can select a maximum of 300 elements from the available list to run the report. For example, you choose a skillset report and see a list of 20 skillsets in the Available filter elements box. If you select no skillsets, you see all 20 skillsets in the report, whereas if you select 3 skillsets, you see only 3 skillsets in the report. For two table reports, for example, Skillset By Agent Performance report, you can select 300 agents and 300 skillsets to run the Skillset by Agent Performance report.

The number of elements defined in a users partition profile is an important consideration when running historical reports. If the combined number of a particular element is greater than 300, then it is necessary for the user to select a subset of 300 elements or less in order to run that report. If no selection criteria is selected, all available elements to that user are applied to the report – Contact Center supports only 300 elements or less. Consider the following example:

A user is assigned three user defined partitions, configured as follows:

Partition Name	Elements
Sales Agents	Contains 200 agents
Support Agents	Contains 80 agents
Service Agents	Contains 50 agents

If the user runs the standard Agent Performance report, the report fails to run and displays this error: “The maximum number of elements supported by the SQL Query is 300. Select up to 300 elements to save/run this report or leave the selection criteria blank to report on all data.” This error appears because the user did not define any selection criteria and the maximum element limit is reached. In

a user defined partition, the number of elements must not exceed 300. If the number of elements exceeds 300, it has the same effect as defining a selection criteria of more than 300 elements. To avoid this, assign less partitions to the user or use standard partitions to allow reports to be run for all elements.

The filter elements available depend on the type of statistics included in the report. If you select multiple filter elements, only those that satisfy all filter criteria appear in the report. For example, if you choose to report on five agents and three activity codes, if one agent uses no activity code, the agent does not appear in the report.

Procedure

1. In the left pane, click the server that contains the report to define.
2. Expand the folder that contains the report template to use.
3. Click the folder containing the type of report to change.
4. Select the report to use.
5. In the right pane, click the **Selection Criteria** heading.
6. In the **Selection Criteria** area, enter information in the following boxes:
   - **Available** heading: Click this heading to view the available filter elements for this report. A table appears, listing the available elements. If multiple filters exist for this report, more than one **Available** table appears. Select the check box for each filter element to apply to the report, and then click **Update Selection Criteria**. The selected filter elements appear in the **Selected** table.
   - **Selected** heading: Click this heading to view the filter elements selected for the report. A table appears, listing the selected elements. To remove selected filter elements, clear the check box for each filter element, and then click **Update Selection Criteria**. The element appears in the **Available** table.
7. Click **Run Now** to generate the report.
8. To save your changes, click **Report Details**, in the **Save As** box, type a name, choose a save location, and then click **Save Report**.

Exporting an Ad hoc report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

Export a report to convert the visual display to a required format.

Procedure

1. In the left pane, click the server that has the report to print.

2. Double-click the folder with the report to print.
3. From the expanded folder, select the report.
4. In the right pane, click **Run Now** to generate the report with the specified properties.

   The Ad-Hoc Report Viewer appears and displays the generated report.
5. Click the **Export** drop-down menu and select an export type. Choose from Excel, PDF, or Word.
6. After you select the export type, you can choose to open or save the report in the chosen exported format.

Creating a shared or private report

Before you begin

- Ensure that you have access to the folder that contains the report to use.
- If you schedule the report, activate the schedule. See Activating a scheduled report on page 84.
- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can create custom reports if you change existing public, shared, or private report templates to suit your needs. Save them in your Group or Private Report Templates folders. When you save a report in your Group folder, you save a shared report; that is, you share the report with other users who have access to your Group folder.

If you do not want to use an existing report as the basis for your custom report, you must create a new report using Microsoft Report Designer and import it into the Contact Center Manager Administration Historical Reporting application. See Importing a report on page 78.

Procedure

1. In the left pane, select the server on which to create the report.
2. Navigate to the folder that contains the report template to use.
3. Click the report to change.
4. In the right pane, click the following headings:
   - **Selection criteria**.
   - **Data range** (not applicable for configuration reports)
   - **Schedule**
5. Click **Report Details**.

6. In the **Report Title** box, type the name to appear at the top of the generated report. If you do not type a new report title, the default title in this box appears at the top of the generated report.

   Note:

   If you save multiple copies of the same public report in your Group or Private report templates folders, change the report title to distinguish between reports when you generate them. If you do not change the report title, all copies of the same public report have the same standard title when you generate the reports.

7. In the **Save As** box, type the new report name.

   Note:

   If you choose a Public report template as the basis for your custom report, and you want to save the new properties that you enter, you must type a new name in the **Save As** box and specify whether to save it in your Private or Group folder. If you use an existing private or shared template as the basis for your custom report, you can choose to make a copy of the report by changing the report name in the **Save As** box, or you can leave the report name and overwrite the existing template with your changes.

8. From the **Location** list, select the save location for your custom report. You can choose between your Private and Group folders (if you have access to a group folder).
9. In the **Comment** box, type comments about the report.
10. From the **Time Zone** list, select the time zone in which you want to define the data range for this report, or accept the default time shown (the system defaults to the client's time zone). The data range depends on Contact Center time since the server stores the data. Therefore, the system always converts the data range times that you enter to Contact Center time.
11. Click **Save Report** to save your changes.

    The report appears in the Group or Private Report Templates folder on the server that you select.

Defining the report output

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can specify whether to print the scheduled report when it generates, save it as a file, or both. You can also specify one or more email addresses where the system can send a notification after the report generates.

If you save the report to a file, you must specify a shared folder to which the Contact Center server sends the output file. This folder can be on your computer, on another computer in the network, or

on the application server. To send the file to a folder on a computer in the network, the network computer must be accessible from the Contact Center server.

Procedure

1. In the left pane, click the server containing the report whose output options you want to define.

   The server expands to reveal a choice between **Public**, **Private**, and **Group** folders (if you have access to a group folder).

2. Expand the folder containing the report template to use.
3. Navigate to the report to edit.

   The report properties appear in the right pane.

4. Click the **Report Details** heading.
5. In the **Report Title** box, type the name to appear at the top of the generated report.

   If you do not type a new report title, the default title in this box appears at the top of the generated report. Do not include apostrophes (’) in the report title.

   Note:

   If you save multiple copies of the same public report in your Group or Private report templates folders, change the report title to distinguish between reports when you generate them. If you do not change the report title, all copies of the same public report have the same standard title when you generate the reports.

6. In the **Save As** box, type the new report name.

   The name appears in the system tree. This name cannot contain apostrophes (’) and it must be unique, if you save the report in the same folder.

7. From the **Location** list, select the folder in which to save your report. You can choose either **Private** or **Group** (if you have access to a group folder).
8. From the **Time Zone** list, select the time zone in which to schedule your report, or accept the system default (the system defaults to the client's time zone).

   Note:

   When you select the schedule time for your report, the system converts the time that you choose to the Contact Center server time, and gives the generated report the Contact Center server timestamp (if you choose a time zone other than the one on the Contact Center server).

9. Click the **Schedule** heading.

   The heading expands to reveal a series of boxes.

10. In the schedule area, enter the report schedule.
11. Click the **Output Options** heading.

    The heading expands to reveal a series of boxes.

The **Output Options** heading is disabled until you schedule the report.

12. In the **Output Options** area, choose the report output type:
    - **Print**: When you select this option, you can choose the printer, or accept the default printer shown. You can also select the paper size for the report from the **Paper Size** list.
    - **Output to file**: When you select this option, you must type the location where the report is saved in the **Output** box in the format `\\[computer name]\[shared folder name]\[file name]`. You can then choose the report file format. Choose between .doc, .pdf, or ,xls.
    - **Email Notification**: When you choose this option, you must enter an email address in the box provided. The system notifies you by email when the report run is finished and report is generated. To enable multiple users to receive notification that a report is generated, you can type multiple email addresses in the box, each address is separated by a semicolon (;). You can type a maximum of 255 characters in the email address box.
13. Click **Save Report** to save your changes.
14. To activate the schedule, in the left pane, select the **Scheduled Events** folder.
15. In the expanded folder, select the report that you just scheduled.
16. Click **Activate**.

    The system activates the schedule and outputs the report to the location that you specify.

Importing a report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can use the Report Template Importing Wizard to import report templates into Contact Center Manager Administration that you create using Microsoft Report Designer. When you import a report template, you save it on the Contact Center server. However, you access the report template by opening your Private Report Templates folder.

To share the report template with other users, you must save your private report in your Group folder (if you have access to a group folder). For more information, see Creating a shared or private report on page 75.

You can import two types of reports: Historical or Configuration.

Procedure

1. In the left pane, click the server to which to import the new report template.
2. On the **Report** menu, click **Import**.

   The system displays the Template Importing Wizard dialog box.

3. Click the **Browse** button next to the **Select Your Report template** field, and navigate to the report.
4. In the **Template Name** box, type the name of the report to import.
5. From the **Report is based on the following data** list, select the type of report.
6. If applicable, provide Database alias, timestamp, and report data range details.
7. Optionally, select **Synchronize report template from the network drive** to ensure the server automatically applies any updates made to the imported report.
8. Click **Import**.

   Follow the wizard prompts to import your report template to the server.

Editing a report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Ensure that you are familiar with defining selection criteria. See Defining the selection criteria on page 73.
- Ensure that you are familiar with scheduling reports. See Scheduling a report on page 81.
- If you edit a scheduled report, you must deactivate the schedule before you can save your changes. See Deactivating a scheduled report on page 85.

About this task

You can edit the properties of private reports or shared reports that you create and save in your Group folder. You can change properties such as the data range, the selection criteria, the schedule, and the report title. You must click **Save Report** to save the new properties.

You can change the properties of a public report template only if you save a copy of the template as a shared or private report. See Creating a shared or private report on page 75.

Procedure

1. In the left pane, click the server containing the report to edit.
2. Navigate to the report to edit.

   The system loads the report properties, and a series of headings appears in the right pane.
3. Click the **Report Details** heading.

   The heading expands to reveal a series of boxes.
4. In this section, you can change information in the following boxes:
   - **Report Title**: The title that appears at the top of the generated report. Do not include apostrophes (’) in the report title.
   - **Comment**: Type comments about the report.

- **Save As**: The name of the report. All reports saved in the same folder must have unique names. This name cannot include apostrophes (’). You must enter a name in this box when you save the report in a different folder. If you save the report in the same folder and do not change this name, the system overwrites the existing report with your new properties.
- **Save Location**: Select the folder in which to save the custom report. If you select Group, all members of your group have access to the report. If you select Private, only you have access to the report.
- **Time Zone**: Select the time zone in which to schedule or define the data range for this report, or accept the default time shown (the system defaults to the client's time zone). The data range depends on Contact Center Manager Server time since the server stores the data. Therefore, the system always converts the data range times that you enter to the Contact Center Manager Server time.

5. Click the **Selection Criteria** heading.

   The heading expands to reveal a series of boxes.

6. Specify the information to include in your report by assigning filter elements.
7. Click the **Data Range** heading.

   The heading expands to reveal a series of boxes.

8. Change the time range, during which the data collects, to specify the amount of data to include in your report.

   If the data range is None and disabled, the report does not require a data range.

9. Click the **Schedule** heading.
10. Indicate when and how often to generate your report.
11. Click the **Output Options** heading (only if you schedule the report). The heading expands to reveal a series of boxes.
12. Specify whether to save or print the report.

    You can enter email addresses on which the system sends a notification to indicate if the report generates successfully.

13. Click **Save Report**.

    Note:

    If you click **Run Now** to generate an on-demand report, property changes are not saved.

Comments? infodev@avaya.com

Printing an Ad hoc report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can print an on-demand report from the Ad-Hoc Report viewer.

Before you can print the report, you must run it. You can run the report with the current properties, or you can define the selection criteria and the data range, and then run the report. See Defining the selection criteria on page 73.

By default, if you do not define the selection criteria, all available data is included in the report when you run it. When you define the selection criteria, you can choose the data that you want to see.

For information about printing scheduled reports, see Defining the report output on page 76.

Procedure

1. In the left pane, click the server containing the report to print.
2. Double-click the folder containing the report to print.
3. From the expanded folder, select the report.
4. In the right pane, click **Run Now** to generate the report with the properties specified.

   The system displays the Ad-Hoc Report Viewer and the generated report.
5. Click the printer icon to print the report to the default printer configured on your computer.

Scheduling a report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Ensure that you are familiar with defining selection criteria.

About this task

You can schedule reports in your group and private folders to send a report to a file or to print a report, or both. You can also specify one or more email addresses where you can receive notification that the report generated, or if problems occurred that prevented it from generating successfully.

You can change the properties of a public report template only by saving a copy of the template as a shared or private report. See Creating a shared or private report on page 75.

If you choose to send the report to a file, you must specify a shared folder where the Contact Center server sends the file. This folder can be on your computer, on another computer in the network, or

on the application server. To send the file to a folder on a computer on the network, the network computer must be accessible from the Contact Center server.

Avaya recommends that you select a start time that does not exactly match an interval start time. If the scheduled report start time matches the start of an interval, it is possible that the report does not contain data for the previous interval. This happens when Contact Center does not complete writing interval data to the database before the scheduled report starts. This can occur because of, for example, the database size, or the volume of contacts processed in the interval. Avaya recommends that you avoid starting reports on the hour, or on fifteen, thirty, or forty-five minutes after the hour. Instead, schedule reports five minutes after intervals, for example 07:05 or 16:20.

Note:

The report schedule that you define cannot start in the p.m. range and end in the a.m. range. After the system converts your selected time to Contact Center server time, if the converted start time is in the p.m. range and the converted end time is in the a.m. range, an error message appears. In this case, you must re-enter the schedule start and end times, taking into account the time difference with the application server.

Procedure

1. In the left pane, click the server containing the report to schedule.
2. Expand the folder containing the report template to use.
3. Click the folder containing the report type to schedule.
4. In the expanded folder, select the report to schedule.
5. In the right pane, click the **Report Details** heading.
6. In the **Report Title** box, type the name to appear at the top of the generated report.

   Note:

   If you do not type a new report title, the default title in this box appears at the top of the generated report. Do not include apostrophes (’) in the report title.
7. If you save multiple copies of the same public report in your Group or Private report templates folders, change the report title to distinguish between reports.

   Note:

   If you do not change the report title, all copies of the same public report have the same standard title when you generate the reports.
8. In the **Save As** box, type the new report name.

   The name appears in the system tree. This name cannot contain apostrophes (’) and it must be unique, if you save the report in the same folder.
9. From the **Location** list, select the folder in which to save the report.

   You can choose either **Private** or **Group** (if you have access to a group folder).
10. From the **Time zone** list, select the time zone in which to schedule your report, or accept the system default (the system defaults to the client's time zone).

Comments? infodev@avaya.com

11. Click the **Selection Criteria** heading.
12. In the **Selection Criteria** area, click the **Available** and **Selected** headings to choose the selection criteria for the report.
13. Click the **Schedule** heading.
14. In the **Schedule** area, select the report schedule criteria.

    Note:

    If you select dates for the report to generate, the report generates for the selected dates each year for as long as the report is scheduled. For this reason, you cannot select to generate the report on February 29 in a leap year, as the following year is not a leap year.
15. Click the **Output Options** heading.
16. In the **Output Options** area, choose the report output:
    - **Report output**: Choose whether to print the report, send it to a file, or both.
    - **Printer**: Select the printer.
    - **Paper Size**: Choose the paper size.
    - **Output**: Type the path to the shared network folder in which to save the report.
    - **Format**: Select the report format.
    - **Save the file under different name each time**: Save each report with a unique name. If you do not choose this option, the system overwrites the existing report.
    - **Email Notification**: Select this option to receive an email notification after the report generates, or if the report does not generate successfully. Enter an email address in the box provided. The system notifies you by email when the report run is finished and the report is generated. To enable multiple users to receive notification that a report generated, you can type multiple email addresses in the box, each address is separated by a semicolon (;). You can type a maximum of 255 characters in the email address box.
17. Click **Save Report** to save your schedule.
18. Click **Activate** to activate the schedule.
19. To verify that the report schedule is active, select the **Scheduled Events** folder, and then locate the scheduled and activated report to view the status and properties.

Variable definitions

Variable	Definition
start time	The time in the selected range in which to generate a report. If you select the schedule time for your report, the system converts the time that you choose to the Contact Center Manager Administration server time

Variable	Definition
	and gives the generated report the Contact Center Manager Administration server timestamp (if you choose a time zone other than the one in the Contact Center Manager Administration server). Avaya recommends that you avoid starting reports on the hour, or on fifteen, thirty, or forty-five minutes after the hour. Instead, schedule reports five minutes after intervals, for example 07:05 or 16:20.

Printing a report schedule

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can use the Scheduled Events window to print the schedules of all reports scheduled by you.

Procedure

1. In the left pane, click the **Scheduled Events** folder. The list of your scheduled reports appears.
2. In the right pane, select a report, and then click **Print**.
3. In the message box that appears, select one of the following options:
   - **Print**: Click **Print** to print the entire list of scheduled reports shown in the window.
   - **Page Setup**: Use the **Page Setup** option to select the paper size of the printed schedules. If you choose **A4** or **Letter** size, the **Schedule Type** and **Status** columns do not appear on the print preview or the printed copy. If you choose **Legal** size, you can preview and print all the displayed grid columns.
   - **Print Preview**: You can preview the report schedule.

Activating a scheduled report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Schedule at least one report.

About this task

When you first schedule a report, or when you deactivate a scheduled report, you must activate it to schedule the report again. You can activate a report in one of two ways:

- Click **Activate** in the Report Properties window while you view a saved, scheduled, but inactive report.
- Click **Activate** in the Scheduled Events window.

This procedure shows you how to activate a report from the Scheduled Events window.

Procedure

1. In the left pane, click the **Scheduled Events** folder.
2. In the right pane, select the report to activate.
3. Click **Activate**.

   The scheduled report activates and runs according to the specified schedule.

Deactivating a scheduled report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Schedule and activate at least one report.

About this task

You must deactivate the report to pause the report run for an active scheduled report.

You must deactivate a report schedule before you change the report properties, or before you delete the scheduled report. To resume the report on schedule, you must reactivate the scheduled report after you make the changes.

You have two options to deactivate a scheduled report:

- In the Report Properties window while viewing a saved, scheduled, and activated report.
- In the Scheduled Events window.

This procedure shows you how to deactivate a report from the Scheduled Events window.

Procedure

1. In the left pane, click the **Scheduled Events** folder.
2. In the right pane, select the scheduled report to deactivate.
3. Click **De-Activate**.

Running a report from a different time zone

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can select the time zone to run an on-demand report or schedule a report. The time zone that you select applies to the data range of the report and the report schedule. You can choose the time zone to appear in:

- the current computer time zone
- the Contact Center (server) time zone
- any other time zone

Procedure

1. In the left pane, select the server that contains the report to run.
2. In the expanded list, double-click the folder that contains the report to run.
3. Select the report to run.
4. In the right pane, click **Report Details.**
5. In the **Time Zone** field, select a time zone.
6. Click **Run Now** to generate the report.

Deleting a report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Deactivate the schedule. See Deactivating a scheduled report on page 85.

About this task

You can delete reports from your private report templates folder and reports in your group folder that you create. You cannot delete public reports.

Deletions appear in the in the Audit Trail log.

Procedure

1. In the left pane, click the server from which to delete the report.

   The server appears to reveal a choice of Public, Private, and Group folders (if you have access to a group).
2. Navigate to the report to delete.

3. Right-click the report, and then click **Delete**.
4. In the confirmation dialog box, click **Yes**.

Chapter 12: Emergency Help

Use Emergency Help to monitor whether the agents configured on the Contact Center server require your assistance. You can keep the display open on your desktop, or you can minimize the display to continue working in Contact Center Manager Administration. When an agent presses the Emergency key, the minimized Emergency Help display automatically opens on your desktop.

For each agent who presses the Emergency key, one line of data appears in the Emergency Help display. The display shows information about the agent, including the agent's name, location, and time when the agent pressed the Emergency key.

Agents can press the Emergency key when they require assistance from the supervisor, for example, if the caller is abusive.

Starting the Emergency Help display

About this task

Start the Emergency Help display to monitor whether the agents configured on the Contact Center server require your assistance. You can keep the display open on your desktop, or you can minimize the display to continue working in Contact Center Manager Administration. When an agent presses the Emergency key, the minimized Emergency Help display automatically opens on your desktop.

Procedure

1. Log on to Contact Center Manager Administration.
2. On the Launchpad, click **Emergency Help**.
3. In the left pane, select the **CC** server.

   The Emergency Help display appears.

Printing an Emergency Help display

Before you begin

- Log on to Contact Center Manager Administration Emergency Help.

About this task

Complete this procedure to print an Emergency Help display.

Procedure

In the **Emergency Help** display, click **Print**.

Exporting an Emergency Help display

Before you begin

- Log on to Contact Center Manager Administration Emergency Help.

About this task

You can export a snapshot of an Emergency Help display to the application server for future reference. The system saves the snapshot data as HTML files with a name containing your user name, a prefix relating to the type of display that you are exporting, and the date and time when you exported the data.

Procedure

1. In the **Emergency Help** display, click **Export**.

   A message box appears, informing you of the HTML file name that you exported.

2. To view the exported display, click **View**.

Viewing an exported Emergency Help display

Before you begin

- Log on to Contact Center Manager Administration Emergency Help.

About this task

View an exported Emergency Help display to view a snapshot of an Emergency Help display that you exported as an HTML file to the Contact Center Manager Administration server.

Procedure

1. In the **Emergency Help** display, on the menu, choose **Displays** > **Manage Exported Displays**.
2. On the Exported Displays dialog box, from the list of HTML files, click the file to view.

   The snapshot of the Emergency Help display appears in a new Internet Explorer window.

Deleting an exported Emergency Help display

Before you begin

- Log on to Contact Center Manager Administration Emergency Help.

About this task

You can delete from the Contact Center Manager Administration server Emergency Help displays that you exported as HTML files.

Procedure

1. On the menu, choose **Displays** > **Manage Exported Displays**.
2. In the **Exported Displays** section, from the list of HTML files, select the check box for each file to delete.
3. Click **Delete** to remove the selected files from the Contact Center Manager Administration server.

Chapter 13: Contact Center Configuration fundamentals

Use the Contact Center Manager Administration Configuration component to view your contact center resources.

Use the Configuration component to view the following resource types:

- activity codes
- contact types
- skillsets
- threshold classes

You can also add and edit activity codes, assign different skillsets to existing contact types, and manually synchronize data from Avaya Contact Center Select to IP Office using the Configuration component.

Synchronizing data to IP Office manually

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

You can manually synchronize data from Avaya Contact Center Select to IP Office using the Configuration component in Contact Center Manager Administration. When you manually synchronize data, Avaya Contact Center Select synchronizes agent and agent-supervisor details to IP Office.

Procedure

1. In the left pane, click **IPOFFICE**.
2. In the right pane, click **Synchronize**.

   Avaya Contact Center Select synchronizes agent and supervisor details to IP Office.

Next steps

On IP Office, verify that the data synchronized successfully.

Chapter 14: Activity codes

An activity code is a number that an agent can enter on Agent Desktop to track time spent on activities and service areas, not ready reasons, and after call work.

Activity codes are of the following three types:

- Activity codes
- Not Ready Reason codes
- After Call Work Item (ACW) codes

You configure activity codes that correspond to a contact type and a skillset. Therefore, activity codes are filtered on a contact type and skillset basis. Agent Desktop displays the activity codes list based on either the contact skillset or the contact type. For example, if you are handling email contacts, Agent Desktop populates the Activity Code list both with activity codes that correspond to the email contact type and with activity codes that map to the skillset.

Activity codes

An agent can enter Activity codes when they are on a Contact Center call.

If an agent does not enter an activity code, Contact Center assigns a default activity code to the contact.

- System default activity code—If an agent does not enter an activity code while working on a contact, and if the contact is not queued to a skillset, the system assigns the System default activity code to the contact.
- Skillset default activity code—If an agent clicks on the activity code key twice during a contact without entering an activity code, the system assigns the Skillset default activity code to the contact.

Not Ready Reason codes

An agent can enter Not Ready Reason codes when they are on a Contact Center call or when they are idle. If an agent enters a Not Ready Reason code while on a call, then the agent transitions to the Not Ready state immediately following the call. If an agent enters a Not Ready Reason code when idle, the agent transitions to the Not Ready state. When the agent is Not Ready and wants to change the reason for being in the Not Ready state, the agent can enter a different Not Ready Reason code. Some examples of Not Ready Reason codes are Lunch or Tea Break.

After Call Work Item codes

An agent can use Agent Desktop to enter an After Call Work Item (ACW) code either while working on a contact, or immediately after releasing the contact.

Agents must enter ACW codes when they perform post call processing work, such as adding contact information to a Customer Relationship Management (CRM) system. Agents can enter ACW

codes only for post call processing work related to the contact that the they just released. In a multiplicity environment, the ACW code applies to the last contact that you release.

Agents can enter ACW codes:

- while working on a contact, which prevents Agent Desktop from presenting new contacts to the agent
- after releasing the contact, and before Agent Desktop presents a new contact to the agent or the agent goes into the Not Ready state.

The After Call Work Item codes are unavailable when:

- the agent first logs on to Agent Desktop
- when the agent has gone into the Not Ready state after a call and then returned to an Idle state

Configuring activity codes

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Configure activity codes that agents can enter on a phone or on Agent Desktop to track time agents spend on activities and service areas, Not Ready reasons and After Call Work Item (ACW) items.

You can configure activity codes that correspond to a type and to a skillset. Therefore, activity codes are filtered on contact type or skillset basis, or both. Agent Desktop displays the activity codes list based on either the skillset of the call or the contact type of the call.

You cannot overwrite the following default activity codes:

- activity code 00000 (Default_ACW)
- activity code 0000 (NotRdy_Pull_Mode_Default_Code)
- activity code 000 (Not_Ready_Default_Reason_Code)
- activity code 00 (Skillset_Default_Activity_Code)
- activity code 0 (System_Default_Activity_Code)

You can add Not Ready Reason codes and After Call Work Item codes in the same way that you add activity codes. Use unique numbers for Not Ready Reason codes, Activity codes, and After Call Work Item codes. Agent Desktop displays a maximum of 16 digits for Not Ready Reason codes, Activity codes, and After Call Work Item codes.

Note:

If you associate an activity code with both contact types and skillsets, the activity codes appears on Agent Desktop for all of the skillsets of the selected contact type and for all of the skillsets individually selected.

Procedure

1. In the system tree, expand the server on which you need to add the activity code.

   The server displays the server resources.
2. Select the **Activity Codes** folder.
3. In the right pane of the Activity Codes section, click **New**.
4. In the **Name** field, type the name of the new activity code.
5. In the **Number** field, type the number of the new activity code.
6. In the **Display Name** field, type the name of the new activity code that the system displays in reports.
7. From the **Type** drop-down list, select the type of the new activity code. You can choose from the following:
   - **Not Ready Reason**
   - **Activity Code**
   - **After Call Work Item**

   Note:

   You cannot change the code type once the code is created.
8. If you are creating an activity code of type **Activity Code** that applies to all of the skillsets of a particular contact type, select the contact type that corresponds to the activity code by clicking the right arrow (**>**) under the Available Contact Types list. If the activity code applies only to a limited number of skillsets, skip to step 10.

   The contact type moves to the Selected Contact Types list.

   Note:

   Assigning both contact types and skillsets to activity codes is not required. You must map skillsets to an activity code only if the activity code is applicable to specific set of skillsets.
9. **(Optional)** To associate all the contact types with an activity, click the double right arrow (**>>**) under the Available Contact Types list.

   All the contact types move to the Selected Contact Types list.
10. **(Optional)** If you are creating an activity code of type **Activity Code**, select the skillsets that correspond to the activity code by clicking the right arrow (**>**) under the Available Skillsets list.

    This skillset moves to the Selected Skillsets list.
11. **(Optional)** To associate all the skillsets with an activity, click the double right arrow (**>>**) under the Available Skillsets list.

    All the skillsets move to the Selected Skillsets list.
12. Click **Save**.

Variable definitions

Name	Description
Name	The name assigned to the activity code. Valid values: Maximum 30 characters (no special characters).
Number	The number assigned to the activity code. Agents enter this number on their phones to assign the activity code to a contact. Valid values: Maximum 32 digits. **Important:** You cannot change the activity code number once you save the activity code. To change the activity code number, delete the activity code, and create a new activity code.
Display Name	The description that corresponds to the activity code. This description appears in custom private real-time displays when agents enters an activity on their phone. Valid values: Maximum 30 characters.
Type	The type of activity code. You can choose from the following: • **Not Ready Reason** • **Activity Code** • **After Call Work Item**

Editing an activity code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Edit an activity code to change the name or display name. If the activity code is of the type **Activity Code**, you can also change the contact type and skillset that corresponds to the activity code.

You cannot change the activity code number or type. To change an activity code number or type, you must delete the activity code and create a new activity code with the new number or type.

Note:

You cannot edit the default activity codes.

Procedure

1. In the left pane, expand the server that contains the activity code to change.

   The server displays the server resources.
2. Select the **Activity Codes** folder.
3. In the right pane, highlight the activity code to change.
4. In the **Name** field, type the new name of the activity code.
5. In the **Display Name** field, type the new name that of the activity code the system displays in reports.
6. If you are editing an activity code of type **Activity Code**, you can change the contacts types that correspond to the activity code by clicking the right arrow (**>**) or left arrow (**<**) under the Available Contact Types list.

   If you click the right arrow (**>**) the contact type moves to the Selected Contact Types list.

   If you click the left arrow (**<**) the contact type moves to the Available Contact Types list.
7. If you are editing an activity code of type **Activity Code**, you can change the skillsets that correspond to the activity code by clicking the right arrow (**>**) or left arrow (**<**) under the Available Skillsets list.

   If you click the right arrow (**>**) the contact type moves to the Selected Skillsets list.

   If you click the left arrow (**<**) the contact type moves to the Available Skillsets list.
8. Click **Save**.

Deleting an activity code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Delete an activity code that you no longer require.

Note:

You cannot delete any of the default activity codes.

Procedure

1. In the system tree, expand the server that contains the activity code to delete.

The server displays the server resources.

2. Select the **Activity Codes** folder.
3. In the right pane, highlight the activity code to delete.
4. Click **Delete**.
5. Click **OK** to confirm the deletion.

Searching for an activity code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

You can search for activity codes based on the name or type of the activity code.

Procedure

1. In the system tree, expand the server that contains the activity codes.

   The server displays the server resources.
2. Select the **Activity Codes** folder.
3. In the right pane of the Activity Codes section, under the Search area, in the **Name** field, type the name of the activity code to search.

   Or

   From the **Type** drop-down list, select the type of activity code to search. You can choose from the following:

   - **Not Ready Reason**
   - **Activity Code**
   - **After Call Work Item**
   - **All**

   To list all your activity codes, click **List All**.
4. Click **Search**.

   The system displays the activity codes that match your criteria.

Comments? infodev@avaya.com

Chapter 15: Contact types

Contact types are the media types by which (inbound) contacts arrive into a contact center and by which a contact center sends (outbound) contacts.

A contact type determines how a contact center handles contacts. An example is email: when a contact center customer sends an email message, the contact center receives the message, and routes the message according to various email-specific rules. If required, an agent with email ability processes the email message.

The following table lists the default supported contact types for Avaya Contact Center Select.

Table 1: Contact types

Default contact type	Skillset prefix	Description
Voice	None	Default Voice Contact Type
Email	EM_	Default CCMM email Contact Type
Fax message	FX_	Default CCMM Fax message Contact Type
Scanned Document message	SD_	Default CCMM Scanned Document message Contact Type
SMS Text message	SM_	Default CCMM SMS Text message Contact Type
Voice Mail message	VM_	Default CCMM Voice Mail message Contact Type
Web_Communications	WC_	Default CCMM Web communication Contact Type
Outbound	OB_	Default CCMM Outbound Contact Type

Editing a contact type

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Note the following:
  - You cannot delete a default contact type.
  - You cannot edit the contact type name or the skillset prefix.

About this task

Edit a contact type to change the description of the contact type or to change the default skillset assigned to that contact type.

Procedure

1. In the system tree, expand the server on which you need to edit the contact type.

   The server displays the server resources.
2. Select the **Contact Types** folder.
3. In the right pane, select the Contact Type to edit.
4. To sort the contact types, click a column header.

   For example, if you click the Name column header, the contact types are sorted alphabetically according to Contact Type name.
5. From the **Default Skillset** list, select a new default skillset, and then press Tab.
6. In the **Description** box, type a new description for the contact type.
7. Click any other row in the grid to save your changes.

Variable definitions

Name	Description
Name	The name of the contact type. **Important:** You cannot modify contact type names.
Skillset Prefix	The prefix that identifies the default skillset that handles contacts of this contact type. There is no skillset prefix for the default contact type, voice. Skillsets without a skillset prefix default to the voice contact type. Valid value: 3-character maximum, the last of which must be an underscore (_) (no special characters, must be unique) **Important:** You cannot modify a skillset prefix for a default contact type.
Default Skillset	Select the skillset to which contacts route for processing when they are not handled in a script. Valid values: 30-character maximum, no special characters allowed.

Name	Description
	Important: This field is optional and must be unique. You must first configure the default skillset in Contact Center Manager Administration. The default skillset must have the same skillset prefix as the contact type.
Description	The description for the contact type. Valid value: Maximum 60 characters (optional, can be updated, special characters are allowed).

Chapter 16: Skillsets

A skillset is a group of abilities necessary to answer a specific type of contact. Skillsets are the basic building blocks of skill-based routing.

Viewing skillsets

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

A skillset is the ability or group of abilities necessary to answer a specific type of contact. Skillsets are the basic building blocks of skill-based routing. Skillsets are used to match callers with the agents who can best meet the callers' needs.

As a supervisor, you can view the skillsets currently configured on the Contact Center server.

Procedure

1. In the left pane, expand the **CC** server.
2. Select the **Skillsets** folder.
3. View the skillsets and the associated Contact Types, Activity Codes, and Threshold Classes.

Chapter 17: Threshold classes

A threshold class is a set of options that determines how statistics are treated in reports and real-time displays. The administrator assigns an agent threshold class to each agent and assigns a skillset threshold class to each skillset.

As a supervisor, you can view the threshold classes currently configured on the Contact Center server.

Viewing threshold classes

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Threshold classes define how statistics are treated in reports and real-time displays. Threshold classes can distinguish between types of information that the system collects. For example, the administrator can create different agent threshold classes for customer service trainees and for senior customer service representatives.

As a supervisor, you can view the threshold classes currently configured on the Contact Center server.

Procedure

1. In the left pane, expand the **CC** server.
2. Select the **Threshold Classes** folder.
3. View the threshold classes and the associated thresholds.

Part 2: Administrator users

This part of the guide describes all of the tasks that the Avaya Contact Center Select administrator can perform in Contact Center Manager Administration.

Chapter 18: Contact Center Configuration fundamentals

Use the Contact Center Manager Administration Configuration component to configure and administer your contact center resources.

Use the Configuration component to configure the following resource types:

- activity codes
- call presentation classes
- CDN's (Route Points)
- contact types
- dialed number identification services (DNIS)
- formulas
- global settings
- historical statistics
- media servers
- multiplicity presentation classes
- real-time statistics
- routes
- skillsets
- threshold classes

You can also manually synchronize data from Avaya Contact Center Select to IP Office using the Configuration component.

Synchronizing data to IP Office manually

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

You can manually synchronize data from Avaya Contact Center Select to IP Office using the Configuration component in Contact Center Manager Administration. When you manually synchronize data, Avaya Contact Center Select synchronizes agent and agent-supervisor details to IP Office.

Procedure

1. In the left pane, click **IPOFFICE**.
2. In the right pane, click **Synchronize**.

   Avaya Contact Center Select synchronizes agent and supervisor details to IP Office.

Next steps

On IP Office, verify that the data synchronized successfully.

Editing a server

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Edit server properties, such as display name, server name, or IP address.

Important:

Ensure that all server details are correct before submitting any changes.

Procedure

1. In the left pane, right-click on the server to edit and select **Edit Properties**.
2. Make the required changes.
3. Click **Submit**.

Refreshing your servers

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Refresh your servers after you:

- Upgrade your server.
- Enable a licensed feature.
- Update the license file on your server.
- Change the CCMS sysadmin password.

Procedure

1. In the left pane, right-click on the server to refresh and click **Refresh Server**.
2. In the confirmation window, click **Yes**.

   A message box appears stating that you must refresh all browsers attached to CCMA. If an Avaya Contact Center Select feature changes, that change is reflected in the browsers only when you refresh them.
3. Click **Yes** to refresh the server.

   After the Refresh is complete, CCMA displays a message informing you that the operation was successful.

Comments? infodev@avaya.com

Chapter 19: Skillsets

A skillset is a group of abilities necessary to answer a specific type of contact. Skillsets are the basic building blocks of skill-based routing.

Skill-based routing

Skill-based routing uses skillsets to match callers with the agents who can best meet their needs.

Out of service skillsets

Skillsets automatically go out of service when all agents log off, or when a supervisor or an administrator changes the Out Of Service Mode in the Skillsets window of the Configuration component.

Two out of service modes are available:

- Transition mode: Transition mode means that agents can answer queued contacts but the skillset accepts no new incoming contacts. New contacts receive night service treatments defined in the script or the default skillset. You must initiate Transition mode manually by selecting Transition from the Out of Service Mode list in the Skillset window of the Configuration component. After all existing queued contacts for a skillset in Transition mode are answered or abandoned, the skillset automatically enters into Night mode. A skillset manually placed in Transition mode that goes into Night mode remains in this state until it is cancelled by selecting N/A from the Out of Service Mode list.
- Night mode: Night mode means that the agents in a particular skillset no longer answer queued contacts and the skillset accepts no new contacts. New contacts or queued contacts receive treatments defined in the script or the default skillset. You can initiate Night mode manually in the Skillset window of the Configuration component, or automatically if all agents belonging to that skillset log off. When you manually place a skillset in Night mode, the skillset remains in this state until you cancel the state by selecting N/A from the Out of Service Mode list in the Skillset window of the Configuration component. Canceling Night mode returns the skillset to In-service mode.

Contacts in queue

Contact Center Manager Server must determine the following to present contacts:

- If multiple agents are available, to which agent does it present the contact?
- If multiple contacts are waiting, which contact does it present first?

Agent selection

If two agents are available to answer an incoming contact, Contact Center Manager Server presents the contact to the agent with the highest priority level for the skillset to which the contact is queued. A supervisor bases the priority level of a skillset on the agent's skill level for that particular skillset. You typically assign a higher priority level to a skillset assigned to an agent with a higher skill level, and assign a lower priority level to a skillset assigned to an agent with a lower skill level. Priority levels range from 1 to 48, with 1 being the highest priority.

To use the enhanced Service Level Routing and Service Level Management, you can set a target service level and assign a standby priority to an agent. When the target service level is achieved, an agent with the highest standby priority is able to handle the contact. Standby priority levels range from 1 to 48, with 1 being the highest priority.

If more than one agent has the same priority, the server presents the contact to an agent based on the Agent Order Preference idle time setting. Your administrator can configure the Agent Order Preference setting in the Global Settings area of the Configuration component of Contact Center Manager Server to base idle time on one of the following:

- longest total time in Idle state since logon
- longest time in Idle state since last status change
- longest total time since last CDN/ACD call or contact

Contact selection

If two contacts are waiting in a skillset queue when an agent for that skillset becomes available, Contact Center Manager Server uses the following criteria (in the order shown) to determine which contact to present first:

- Call priority—This is a numeric value assigned in a script that defines the relative importance of a contact. All priority 1 contacts are always answered before contacts of priority 2 or greater.
- Call age preference—The administrator specifies incoming contact position in the pending request queue based on the age of the contact. For each skillset, the administrator can specify Oldest or First in Queue as the call age preference. The two age preferences differ as follows:
  - Oldest—Each contact enters the queue according to the time elapsed since entering the Master script for Contact Center Manager Administration. When the contact enters the

Comments? infodev@avaya.com

pending request queue, the time associated with the age of the contact starts when the contact enters the Master script. The older the contact is, the further toward the front of the queue the contact is inserted. The system orders queue requests in a front-to-back sequence.

- First in Queue—Represents the age of the contact since it was queued to the skillset. For First in Queue order, the contact enters at the back of the queue, regardless of its age relation to other contacts. For example, if a contact was queued 10 seconds ago, its First in Queue age is 10 seconds. Any contact entering the queue after this contact enters at the back of the queue and is considered the youngest contact in the queue. The time associated with the age of the contact starts when it enters the pending request queue.

To queue to a default skillset

Your administrator can define a default skillset. Any contacts not queued by the end of script execution automatically queue to this skillset.

Activity codes

Agents can assign activity (line of business) codes to the contacts they answer. The system uses activity codes to track the amount of time spent on the various types of incoming contacts. To generate reports with meaningful activity code names, the administrator must define these activity codes in Contact Center Manager Administration.

Adding a skillset

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Define the activity code to be assigned as the default activity code for the skillset if you do not want to use a system-defined default.
- Define the threshold class to assign to this skillset if you do not want to use a default threshold class.

About this task

A skillset is the ability or group of abilities necessary to answer a specific type of contact. Skillsets are the basic building blocks of skill-based routing. Skillsets are used to match callers with the agents who can best meet the callers' needs.

Important:

When you add a skillset, you must ensure the skillset name does not begin with two letters and an underscore. This avoids a potential conflict with the prefix of any future contact types.

Procedure

1. In the left pane, expand the server to which to add the skillset.
2. Select the **Skillsets** folder.
3. Assign a contact type to the skillset. Select a value from the **Contact Type** drop-down list. CCMA automatically populates the **Prefix** field with the appropriate skillset name prefix. If you do not select a type, the skillset defaults to the Voice type.
4. In the **Skillset Name** box, type a name for the skillset.

   Note:

   The maximum length of a skillset name allowed, including the prefix, is 30 characters. The name must not have a numeral as the first character, and not use spaces, special characters, or languages other than English. While skillsets and applications can share the same name without affecting pegging, to help distinguish skillset names from application names, you can add _SK to the end of the name. For example, Sales_SK or Service_SK.
5. From the **Default Activity Code** list, select the activity code that is registered whenever this skillset is used.
6. From the **Threshold Class** list, select the threshold class associated with this skillset.
7. From the **Call Age Preference** list, select the method to configure the order of contacts in the queue. If you want priority given to the oldest contact in the system, select **Oldest**. If you want to give priority to the first contact in the queue, select **First In Queue**.
8. From the **Out Of Service Mode** list, select a value to take the skillset offline and specify the service mode for the manual night service platform.
9. Optionally, if you want to enable Service Level Routing, Service Level Management enhancement or both, perform steps 10 and 11 otherwise skip to step 12.
10. In the **Target Service level** field, enter target service level threshold value in seconds.
11. Select the **Service Level Routing** check box.

    You can enable Service Level Routing enhancement by selecting the Service Level Routing check box and setting a valid Target Service Level value.

    Important:

    At least one agent within the range of normal priorities and one agent within the range of standby priorities must be assigned to the skillset in order to enable Service Level Management enhancement.
12. Optionally, in the **Comment** box, type any comments you have about the skillset.
13. Click any other row in the grid to save your changes.

Chapter 20: CDNs (Route Points)

Use a controlled directory number (CDNs) or a Route Point to treat contacts in Contact Center and to route the contact to an agent. You must configure a short code on IP Office that maps to a telephone number. IP Office forwards all calls made to this telephone number to the corresponding short code, which in turn routes the call to Contact Center. If the telephone number matches the number of a configured Contact Center Route Point, Contact Center treats the call and routes the call to an agent. For more information, see *Avaya Contact Center Select Solution Description*.

Configuring and acquiring a CDN (route point)

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Complete this procedure to configure a Contact Center Route Point.

Procedure

1. In the system tree, expand the server on which you need to add the route point.

   The server displays the server resources.
2. Select the **CDNs (Route Points)** folder.
3. In the right pane, in the **Name** box, type the name of the CDN (Route Point) as you want it to appear in reports.
4. In the **Number** box, type the CDN (Route Point) number.
5. In the **URI** box, type a value for the Universal Resource Indicator (URI) of the CDN (Route Point).
6. From the **Call Type** list, select **Local**.
7. Click any other row of the table to add the CDN (Route Point).

   Not Acquired appears in the Status column.
8. Select the **Acquired?** check box for the CDN (Route Point) Landing Pad.
9. Click any other row of the table to acquire the CDN (Route Point) Landing Pad.

10. Click **Refresh Status** to view the current status.

Variable definitions

Name	Description
Name	The name of the CDN (Route Point) as you want it to appear in reports. Valid values: Any freeform string that describes the route point, type, or function.
Number	The number assigned to the CDN (Route Point). This number must match the number configured on IP Office that maps to a short code. **Important:** You cannot change a saved CDN (Route Point) number. You must delete the CDN and then recreate it. Valid values: 15-digit maximum
URI	The Universal Resource Identifier (URI) of the CDN (Route Point). The URI must equate to the fully qualified SIP address for the CDN (Route Point). Valid values: maximum 255 characters, including numbers, English characters, periods, '@' symbol, underscores, and dashes. This field is mandatory. You cannot modify the URI of a saved CDN (Route Point). The URI must be unique to URIs currently assigned to other CDNs or agents.
Call Type	Select Local.
Acquired?	**Important:** Select the Acquired? check box to acquire or deacquire the CDN (Route Point) and then click Refresh Status to refresh the Status column. If the acquisition is successful, Acquired appears in the Status column. When you successfully deacquire the CDN (Route Point), Not Acquired appears in the Status column.
Status	The Status column displays the acquisition status of the CDN (Route Point) or Open Queue CDN (Route Point). When you deacquire the CDN (Route Point), the value Not Acquired appears in this column.

Name	Description
	Valid values: • Not Acquired • Acquire Pending • Acquired • Acquire Failed • Deacquire Failed • Deacquire Pending The data is read-only.
Refresh Status	Click Refresh Status to refresh the status of the resources that you acquire or deacquire. The current status appears in the Status column.

Configuring and acquiring an Open Queue CDN (route point)

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Complete this procedure to configure and acquire an Open Queue CDN (route point) for multimedia contacts.

A multimedia route point is an address that enables incoming multimedia contacts to be treated by Contact Center.

Procedure

1. In the system tree, expand the server on which you need to add the route point.

   The server displays the server resources.
2. Select the **CDNs (Route Points)** folder.
3. In the right pane, select the **OpenQueue** tab.
4. In the **Name** box, type the name of the Open Queue CDN (Route Point) as you want it to appear in reports.
5. From the **Call Type** list select **Open Queue Local**.
6. Click any other row of the table to add the Open Queue CDN (Route Point).

   Not Acquired appears in the Status column.

7. Select the **Acquired?** check box for the Open Queue CDN (Route Point).
8. Click any other row of the table to acquire the Open Queue CDN (Route Point).
9. Click **Refresh Status** to view the current status.

Variable definitions

Name	Description
Name	The name of the CDN (Route Point) as you want it to appear in reports. Valid value: 30-character maximum (no special characters)
Call Type	Select Open Queue Local.
Acquired?	Select the Acquired? check box to acquire or deacquire the CDN (Route Point) and then click Refresh Status to refresh the Status column. If the acquisition is successful, Acquired appears in the Status column. When you successfully deacquire the CDN (Route Point), Not Acquired appears in the Status column.
Status	The Status column displays the acquisition status of the CDN (Route Point) or Open Queue CDN (Route Point). When you deacquire the CDN (Route Point), the value Not Acquired appears in this column. Valid values: • Not Acquired • Acquire Pending • Acquired • Acquire Failed • Deacquire Failed • Deacquire Pending The data is read-only.
Refresh Status	Refresh the status of the resources that you acquire or deacquire. The current status appears in the Status column.

Acquiring multiple configured CDNs (Route Points)

About this task

Follow this procedure to acquire a large number of CDNs (Route Points). You can do this, for example, to acquire a number of CDNs (Route Points) imported into CCMA using a bulk import. If you have a large number of CDNs (Route Points) to acquire, this operation can take some time.

Procedure

1. In the left pane, expand the Contact Center Manager Server on which you want to acquire multiple CDNs (Route Points).
2. Select the **CDNs (Route Points)** folder.
3. Click **Acquire All CDNs**.
4. On the Acquire Confirmation dialog, click **Yes**.

   Contact Center acquires all the CDNs (Route Points) that are not in the Acquired state. Depending on the number of CDNs that are not in the Acquired state, this can take some time.
5. When Contact Center finishes acquiring the CDNs (Route Points), click **Refresh Status** and check the status of all the CDNs (Route Points).

Deacquiring a CDN (route point)

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Deacquire a CDN (route point) to stop the system from tracking calls terminated on it. Before you can delete a CDN (route point), you must deacquire it.

Procedure

1. In the system tree, expand the server on which you need to deacquire the route point.

   The server displays the server resources.
2. Select the **CDNs (Route Points)** folder.
3. In the right pane, select the applicable tab.

   For example, to deacquire an Open Queue CDN (Route Point) select the OpenQueue tab.
4. Clear the **Acquired?** check box for the CDN (Route Point) to deacquire.
5. Click any other row in the table to deacquire the CDN (Route Point).

   The status appears in the Status column.

6. To view the current status, click **Refresh Status**.

Deleting a CDN (route point)

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Deacquire the CDN. See Deacquiring a CDN (route point) on page 115.

About this task

When you delete a CDN (Route Point) in Contact Center Manager Administration, the corresponding number on IP Office is unaffected.

Procedure

1. In the system tree, expand the server on which you need to delete the route point.

   The server displays the server resources.
2. Select the **CDNs (Route Points)** folder.
3. In the right pane, select the applicable tab.

   For example, to delete an Open Queue CDN (Route Point) select the OpenQueue tab.
4. Select the CDN (Route Point) to delete.
5. Press **Delete**.
6. In the **Confirm Delete** message box, click **Yes** to delete the CDN (Route Point) from the server.

Deacquiring all CDNs (Route Points)

Before you begin

- **Caution:**

  Ensure your contact center is not actively processing customer contacts. Deacquiring all CDNs (Route Points) stops all call processing in Contact Center.

About this task

Follow this procedure to deacquire all the CDNs (Route Points) that are in the Acquired state. Deacquire all the CDNs (Route Points) only in exceptional circumstances, such as troubleshooting. Deacquiring all CDNs (Route Points) stops all call processing in Contact Center.

Procedure

1. In the left pane, expand the Contact Center Manager Server on which you want to deacquire multiple CDNs (Route Points).
2. Select the **CDNs (Route Points)** folder.
3. Click **De-acquire All CDNs**.
4. On the De-acquire Confirmation dialog, click **Yes**.

   Contact Center deacquires all the CDNs (Route Points) that are in the Acquired state. Depending on the number of CDNs that are in the Acquired state, this can take some time.
5. When Contact Center finishes deacquiring the CDNs (Route Points), click **Refresh Status** and check the status of all the CDNs (Route Points).

Chapter 21: Activity codes

An activity code is a number that an agent can enter on Agent Desktop to track time spent on activities and service areas, not ready reasons, and after call work.

Activity codes are of the following three types:

- Activity codes
- Not Ready Reason codes
- After Call Work Item (ACW) codes

You configure activity codes that correspond to a contact type and a skillset. Therefore, activity codes are filtered on a contact type and skillset basis. Agent Desktop displays the activity codes list based on either the contact skillset or the contact type. For example, if you are handling email contacts, Agent Desktop populates the Activity Code list both with activity codes that correspond to the email contact type and with activity codes that map to the skillset.

Activity codes

An agent can enter Activity codes when they are on a Contact Center call.

If an agent does not enter an activity code, Contact Center assigns a default activity code to the contact.

- System default activity code—If an agent does not enter an activity code while working on a contact, and if the contact is not queued to a skillset, the system assigns the System default activity code to the contact.
- Skillset default activity code—If an agent clicks on the activity code key twice during a contact without entering an activity code, the system assigns the Skillset default activity code to the contact.

Not Ready Reason codes

An agent can enter Not Ready Reason codes when they are on a Contact Center call or when they are idle. If an agent enters a Not Ready Reason code while on a call, then the agent transitions to the Not Ready state immediately following the call. If an agent enters a Not Ready Reason code when idle, the agent transitions to the Not Ready state. When the agent is Not Ready and wants to change the reason for being in the Not Ready state, the agent can enter a different Not Ready Reason code. Some examples of Not Ready Reason codes are Lunch or Tea Break.

After Call Work Item codes

An agent can use Agent Desktop to enter an After Call Work Item (ACW) code either while working on a contact, or immediately after releasing the contact.

Agents must enter ACW codes when they perform post call processing work, such as adding contact information to a Customer Relationship Management (CRM) system. Agents can enter ACW

codes only for post call processing work related to the contact that the they just released. In a multiplicity environment, the ACW code applies to the last contact that you release.

Agents can enter ACW codes:

- while working on a contact, which prevents Agent Desktop from presenting new contacts to the agent
- after releasing the contact, and before Agent Desktop presents a new contact to the agent or the agent goes into the Not Ready state.

The After Call Work Item codes are unavailable when:

- the agent first logs on to Agent Desktop
- when the agent has gone into the Not Ready state after a call and then returned to an Idle state

Configuring activity codes

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Configure activity codes that agents can enter on a phone or on Agent Desktop to track time agents spend on activities and service areas, Not Ready reasons and After Call Work Item (ACW) items.

You can configure activity codes that correspond to a type and to a skillset. Therefore, activity codes are filtered on contact type or skillset basis, or both. Agent Desktop displays the activity codes list based on either the skillset of the call or the contact type of the call.

You cannot overwrite the following default activity codes:

- activity code 00000 (Default_ACW)
- activity code 0000 (NotRdy_Pull_Mode_Default_Code)
- activity code 000 (Not_Ready_Default_Reason_Code)
- activity code 00 (Skillset_Default_Activity_Code)
- activity code 0 (System_Default_Activity_Code)

You can add Not Ready Reason codes and After Call Work Item codes in the same way that you add activity codes. Use unique numbers for Not Ready Reason codes, Activity codes, and After Call Work Item codes. Agent Desktop displays a maximum of 16 digits for Not Ready Reason codes, Activity codes, and After Call Work Item codes.

Note:

If you associate an activity code with both contact types and skillsets, the activity codes appears on Agent Desktop for all of the skillsets of the selected contact type and for all of the skillsets individually selected.

Procedure

1. In the system tree, expand the server on which you need to add the activity code.

   The server displays the server resources.
2. Select the **Activity Codes** folder.
3. In the right pane of the Activity Codes section, click **New**.
4. In the **Name** field, type the name of the new activity code.
5. In the **Number** field, type the number of the new activity code.
6. In the **Display Name** field, type the name of the new activity code that the system displays in reports.
7. From the **Type** drop-down list, select the type of the new activity code. You can choose from the following:
   - **Not Ready Reason**
   - **Activity Code**
   - **After Call Work Item**

   Note:

   You cannot change the code type once the code is created.
8. If you are creating an activity code of type **Activity Code** that applies to all of the skillsets of a particular contact type, select the contact type that corresponds to the activity code by clicking the right arrow (**>**) under the Available Contact Types list. If the activity code applies only to a limited number of skillsets, skip to step 10.

   The contact type moves to the Selected Contact Types list.

   Note:

   Assigning both contact types and skillsets to activity codes is not required. You must map skillsets to an activity code only if the activity code is applicable to specific set of skillsets.
9. **(Optional)** To associate all the contact types with an activity, click the double right arrow (**>>**) under the Available Contact Types list.

   All the contact types move to the Selected Contact Types list.
10. **(Optional)** If you are creating an activity code of type **Activity Code**, select the skillsets that correspond to the activity code by clicking the right arrow (**>**) under the Available Skillsets list.

    This skillset moves to the Selected Skillsets list.
11. **(Optional)** To associate all the skillsets with an activity, click the double right arrow (**>>**) under the Available Skillsets list.

    All the skillsets move to the Selected Skillsets list.
12. Click **Save**.

Variable definitions

Name	Description
Name	The name assigned to the activity code. Valid values: Maximum 30 characters (no special characters).
Number	The number assigned to the activity code. Agents enter this number on their phones to assign the activity code to a contact. Valid values: Maximum 32 digits. **Important:** You cannot change the activity code number once you save the activity code. To change the activity code number, delete the activity code, and create a new activity code.
Display Name	The description that corresponds to the activity code. This description appears in custom private real-time displays when agents enters an activity on their phone. Valid values: Maximum 30 characters.
Type	The type of activity code. You can choose from the following: • **Not Ready Reason** • **Activity Code** • **After Call Work Item**

Editing an activity code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Edit an activity code to change the name or display name. If the activity code is of the type **Activity Code**, you can also change the contact type and skillset that corresponds to the activity code.

You cannot change the activity code number or type. To change an activity code number or type, you must delete the activity code and create a new activity code with the new number or type.

Note:

You cannot edit the default activity codes.

Procedure

1. In the left pane, expand the server that contains the activity code to change.

   The server displays the server resources.
2. Select the **Activity Codes** folder.
3. In the right pane, highlight the activity code to change.
4. In the **Name** field, type the new name of the activity code.
5. In the **Display Name** field, type the new name that of the activity code the system displays in reports.
6. If you are editing an activity code of type **Activity Code**, you can change the contacts types that correspond to the activity code by clicking the right arrow (**>**) or left arrow (**<**) under the Available Contact Types list.

   If you click the right arrow (**>**) the contact type moves to the Selected Contact Types list.

   If you click the left arrow (**<**) the contact type moves to the Available Contact Types list.
7. If you are editing an activity code of type **Activity Code**, you can change the skillsets that correspond to the activity code by clicking the right arrow (**>**) or left arrow (**<**) under the Available Skillsets list.

   If you click the right arrow (**>**) the contact type moves to the Selected Skillsets list.

   If you click the left arrow (**<**) the contact type moves to the Available Skillsets list.
8. Click **Save**.

Deleting an activity code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Delete an activity code that you no longer require.

Note:

You cannot delete any of the default activity codes.

Procedure

1. In the system tree, expand the server that contains the activity code to delete.

Comments? infodev@avaya.com

The server displays the server resources.

2. Select the **Activity Codes** folder.
3. In the right pane, highlight the activity code to delete.
4. Click **Delete**.
5. Click **OK** to confirm the deletion.

Searching for an activity code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

You can search for activity codes based on the name or type of the activity code.

Procedure

1. In the system tree, expand the server that contains the activity codes.

   The server displays the server resources.
2. Select the **Activity Codes** folder.
3. In the right pane of the Activity Codes section, under the Search area, in the **Name** field, type the name of the activity code to search.

   Or

   From the **Type** drop-down list, select the type of activity code to search. You can choose from the following:

   - **Not Ready Reason**
   - **Activity Code**
   - **After Call Work Item**
   - **All**

   To list all your activity codes, click **List All**.
4. Click **Search**.

   The system displays the activity codes that match your criteria.

Chapter 22: Call presentation classes

A call presentation class is a collection of preferences that determines how contacts are presented to an agent. A call presentation class specifies whether a break time between contacts is permitted, and whether agents must accept calls.

Creating a call presentation class

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Create a call presentation class to determine how contacts are presented to an agent's phone. You can choose the following presentation methods:

- Automatically answer the contact at the agent's phone.
- Return the contact to the queue if the contact is not answered within a specified period.

In addition, you can choose whether to allow the agent time to wrap up a contact after it ends.

Procedure

1. In the system tree, expand the server on which to add the call presentation class.

   The server shows its resources.
2. Select the **Call Presentation Classes** folder.
3. In the right pane, in the **Name** box, type the name of the call presentation class as it appears in reports.
4. From the **Presentation Option** list, select the one of the following call presentation options:
   - Return to Queue
   - Call Force Delay
5. If you select the **Call Force Delay** presentation option, in the **Call Force Delay Timer** box, type the number of seconds after which the contact is automatically answered at the agent's phone and proceed to step 8.

Note:

You can configure the Call Force Answer Zip Tone feature for your solution. If this is configured in a contact center where the Agent's phone ringer is disabled, in order to reduce customer wait time, Avaya recommends setting the Call Force Delay Timer to zero seconds. Call Force Answer Zip Tone is supported only when the **Call Force Delay** presentation option is selected on the call presentation class.

6. In the **Return to Queue After N Seconds** box, type the time after which the contact returns to the queue if not answered.
7. From the **After Return to Queue, Make Phoneset** list, select the mode in which the phone is placed after the contact returns to the queue.
8. In the **After Call, Break for N Seconds** box, type the amount of time that the agent is in break state after a call ends.
9. Click any other row in the grid to submit your changes and to save the call presentation class.

Variable definitions

Name	Description
Name	The name assigned to the call presentation class. Valid values: 30-character maximum (no special characters, no spaces)
Presentation Option	Select one of the following call presentation options for the call presentation class: • Call Force Delay—Choose this option to force a call on an agent if the agent does not answer the call within the specified amount of time. If you select this option, you must specify the time delay in seconds in the Call Force Delay Timer box. • Return to Queue—Choose this option to return a call to the queue if the agent does not answer the call within the specified amount of time. Valid values: 1200–second (20 minute) maximum **Note:** Voice contacts return to the queue after 30 seconds, regardless of the specified amount of time set.
Call Force Delay Timer	If you select Call Force Delay from the Presentation Option list, in the Call Force Delay Timer box, type the time delay in seconds.

Name	Description
	Note: You can configure the Call Force Answer Zip Tone feature for your solution. If this is configured in a contact center where the Agent's phone ringer is disabled, in order to reduce customer wait time, Avaya recommends setting the Call Force Delay Timer to zero seconds.
Return to Queue After N Seconds	If you select Return To Queue from the Presentation Option list, in the Return To Queue After N Seconds box, type the wait interval in seconds. If you do not select Return to Queue as the presentation option, the value is N/A. Valid values: 1 — 300 (seconds)
After Return to Queue, Make Phoneset	If you select Return To Queue from the Presentation Option list, from the After Return To Queue, Make Phoneset list, select one of the following values: • Logout • Not Ready • N/A
After Call, Break for N Seconds	The amount of time, in seconds, that an agent is in break state at the end of a call and before the next call. The agent can use this time to complete processing related to the finished call. This applies to Contact Center calls only. **Important:** After an agent completes a blind transfer of a Contact Center call, the agent is available to receive another voice contact. To avoid the transferred call being returned to the same agent, configure a break time. Valid values: 0–300 (seconds)

Deleting a call presentation class

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Ensure that the call presentation class is not assigned to an agent.

About this task

Delete a call presentation class that is no longer required to save room in your database.

Procedure

1. In the left pane, expand the server from which to delete the call presentation class.
2. Select the **Call Presentation Classes** folder.
3. In the right pane, in the table, highlight the row containing the call presentation class to delete.
4. Press **Delete**.
5. On the **Confirm Delete** message box, click **Yes** to delete the call presentation class.

Chapter 23: Threshold classes

A threshold class is a set of options that determines how statistics are treated in reports and real-time displays. You must assign an agent threshold class to each agent; you must assign a skillset threshold class to each skillset.

Because you can define multiple threshold classes of each type, you can treat statistics differently for different agents and skillsets.

- Display thresholds
- Pegging thresholds

Display thresholds

A display threshold is used in real-time displays to determine the lower and upper end of the normal range for a statistic. In your real-time display, you can assign different colors for statistics below the normal range, in the normal range, or above the normal range.

Pegging thresholds

Pegging thresholds are used to define a cut-off value for a statistic such as Short Call, Delay Before Answer, or Abandon.

For example, you can set the Short Call length to 10 seconds in a skillset threshold class. If a contact to a skillset with that threshold class lasts less than 10 seconds while connected to an agent, the contact is pegged as a Short Call.

Editing a threshold class

Before you begin

- You must define two values for display thresholds—the low end and the high end of the normal range.
- For pegging thresholds, define only the cut-off limit for statistics.

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Modify a threshold class to change how statistics are treated in reports and real-time displays. You can edit threshold classes to distinguish between types of information that the system collects.

For example, you can create different agent threshold classes for customer service trainees and for senior customer service representatives.

Procedure

1. In the left pane, expand the server on which to create the threshold class.
2. Select the **Threshold Classes** folder.
3. In the right pane, select the name of the threshold class you want to edit.
4. In the **Enabled** box of the **Thresholds** table, select the check box for each statistic for which to define thresholds.
5. In the **Level 1** box, type the value for the low end of the normal range for display thresholds.
6. For display thresholds only, in the **Level 2** box, type the value for the high end of the normal range.
7. Click any other row in the grid to submit your changes.

Variable definitions

Name	Description
Level 1	The low end of the normal range for display thresholds. For pegging thresholds, enter the cut-off value for this statistic. You must define the service level threshold for both Application and Skillset statistics. However, the values for each type of statistic can be different. The Calls Answered After Threshold value for Skillset statistics is the number of local incoming skillset calls answered after a delay greater than or equal to the service-level threshold for this skillset. Delays are calculated from the time the call is queued at the skillset to the time the call is answered. Dropping below this level can mean normal contact center operation and no action required (that is, the lower the number of calls waiting, the better). However, it can also signify an alert situation that requires attention (that is, the lower the service level percentage, the worse the situation).

Name	Description
Level 2	The high end of the normal range for display thresholds. This value does not apply to pegging thresholds. Exceeding this level can mean normal contact center operation and no action required (that is, the higher the service level percentage, the better). However, it can also signify an alert situation that requires attention (that is, the greater the number of calls waiting, the worse the situation).
Enabled	Select to enable a particular threshold.

Chapter 24: Routes

Routes link announcements and music provided by the Avaya Media Server to the RAN block configured in an Orchestration Designer (OD) script.

The Route Name is a string that must be identical to the announcement (WAV) file name or music content group (for example, classical, jazz, easy listening) stored on the Avaya Media Server. For announcements the Route Name must be identical to the announcement (WAV) file name under the locale content group on the Avaya Media Server.

The OD script uses the Route Number mapping to invoke this file for playback. This configuration allows the announcement file name and music content group to appear on the generated RAN and MUSIC reports.

Configuring and acquiring routes

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Use this procedure to create Recorded Announcement (RAN) routes for your Contact Center.

The Route Name must be identical to the announcement file name or music content group configured on the Avaya Media Server. The Route Number can be arbitrary (though it must be unique), and the RAN block in Orchestration Designer uses this number to identify the file to play.

You cannot modify a saved route. You can delete a saved route and add a new route.

Procedure

1. In the left pane, expand the server to which to add the route.
2. Select the **Routes** folder.
3. In the right pane, in the **Name** box, type the name of the route as you want it to appear in reports.
4. In the **Number** box, type the route number.
5. From the **Threshold Class** list, select the threshold class assigned to this route.
6. Click any other row of the table to add the route.

Not Acquired appears in the Status column.

7. Select the **Acquired?** check box.
8. Click any other row of the table to acquire the route.

Variable definitions

Name	Description
Name	The name assigned to the route. The Route Name is a string which must be identical to the announcement filename or music content group configured on the Avaya Media Server. For announcements the Route Name must be identical to the announcement (WAV) file name under the locale content group on the Avaya Media Server. Valid value: 30-character maximum (no special characters)
Number	The number of the route. You cannot change a route number once you save it; you can only delete it and create a new one. The value is arbitrary but must be unique. Valid value: 3-digit maximum; External route: 1–511
Threshold Class	The name of the threshold class assigned to this route. Valid values: 30-character maximum (no spaces or special characters)
Refresh Status	Refresh the status of the resources that you acquire or deacquire.

Chapter 25: Multiplicity presentation classes

A multiplicity presentation class is a collection of preferences that determines the number and types of contacts that Contact Center presents to a multiplicity-enabled agent. A multiplicity presentation class specifies the minimum time between contacts being presented on Agent Desktop, the skillsets or types of Multimedia contacts, and the number of concurrent contacts the agent can receive.

Note:

You cannot select Voice or Voice Mail contact types when creating a Multiplicity Presentation Class (MPC). By default, each MPC has one Voice and one Voice Mail contact type.

Creating a multiplicity presentation class

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Create a multiplicity presentation class (MPC) to determine how an agent using Agent Desktop can work with multiple contacts at one time. Use a multiplicity presentation class to specify the following:

- which contact types to present to the agents
- the maximum number of active contacts an agent has at one time by contact type or skillsets
- whether voice contacts can interrupt Multimedia contacts
- whether Multimedia contacts are presented while agent is on a voice call

Procedure

1. In the system tree, expand the server on which to add the multiplicity presentation class.

   The server shows its resources.
2. Select the **Multiplicity Presentation Classes** folder.
3. In the right pane, click **Create New**.
4. In the **Name** box, type the name of the new multiplicity presentation class.

5. From the **Value** list, select the maximum number of multimedia contacts that an agent using this MPC is allowed to have active at one time.
6. In the **Delay** box, type a delay in seconds that occurs between each contact presented to the agent.
7. To allow agents using this MPC to receive multimedia contacts while they are active on voice contacts, select **Agent will remain in a Ready state when a voice call is answered**.
8. To allow agents using this MPC to receive voice contacts while they have active multimedia contacts, select **Agent will remain in a Ready state when a multimedia contact is answered or presenting for more than 10 seconds**.
9. Select **Place active contact on hold when voice call becomes active** to set the active multimedia contact on hold when the agent accepts a presenting voice contact.
10. In the **Assigned Contact Types** list, use the **Value** list for each contact type to specify the maximum number of contacts from each contact type that the agent can have active at one time.
11. Click **Unassigned Skillsets**.
12. Use the **Skillset name** search fields to search for a specific list of skillsets, or click **List All** to list all the skillsets configured in the Contact Center.
13. Check the **Assign** check box for any skillset that you want to assign to this MPC. You can only assign skillsets if the corresponding contact type has a zero value in its **Value** list in **Assigned Contact Types**.
14. Click **Submit**.

    The skillset becomes available in the Assigned Skillsets list, with the default value of 1.
15. In the **Assigned Skillsets** list, use the **Value** list for each skillset to specify the maximum number of contacts from that skillset that the agent can have active at one time.
16. Click **Submit** to submit your changes and to save the multiplicity call presentation class.

Variable definitions

Name	Description
Name	The name assigned to the multiplicity presentation class. Valid value: 30-character maximum (no special characters or spaces)
Value	Select the maximum number of multimedia contacts that an agent can keep active at one time on Agent Desktop. When the agent reaches this limit, the Contact Center does not present any more multimedia contacts to the agent until the agent closes a multimedia contact.

Name	Description
Delay	The time that the Contact Center waits between sending contacts to the agent. This prevents the agent from receiving multiple simultaneous contacts. If an agent configured with this MPC also has a call presentation class with a value for After Call Break for N Seconds, Contact Center Manager Server uses the greater of the two values between contacts. Valid values: 10-300 (seconds)
Agent will remain in a Ready state when a voice call is answered	Select to allow the agent to receive multimedia contacts while they are on a voice call.
Agent will remain in a Ready state when a multimedia contact is answered or presenting for more than 10 seconds	Select to allow the agent to receive a voice call while they are working on a Multimedia contact.
Place active contact on hold when voice call becomes active	Select to set the active multimedia contact on hold when the agent accepts a presenting voice call, allowing the agent to focus on the voice contact.
Assigned Contact Types	List the contact types that you can include in the multiplicity presentation class.
Assigned Contact Types–Value	Select the maximum number of contacts of this contact type that the agent can have active on Agent Desktop. These lists automatically have a maximum value equal to the number set in the Value field. The cumulative total of the values you select for all contact types does not impact the overall maximum number of contacts as set in the Value field.
Assigned Skillsets	Display skillsets selected for this multiplicity presentation class.
Assigned Skillsets –Value	Select the maximum number of contacts from this skillset that the agent can have active on Agent Desktop. These lists automatically have a maximum value equal to the number set in the Value field. The cumulative total of the values you select for all contact types does not impact the overall maximum number of contacts as set in the Value field.
Unassigned Skillsets	Allows you to search for and select skillsets to assign to this multiplicity presentation class. You can select skillsets only if there is a zero value for their corresponding contact type in the Assigned Contact Types list.

Name	Description
	The skillsets you select appear in the Assigned Skillset list when you click Submit.
Skillset name	The drop down list allows you to specify a search option. The text box allows you to specify the text for which to search the CCMS skillsets.
Search	Initiate a search of the CCMS skillset list using the criteria in the Skillset Name fields. Matching skillsets display in a list below. You can only select skillsets if there is a zero value for their corresponding contact type in the Assigned Contact Types list.
List All	Display the complete CCMS skillset list. You can only select skillsets if there is a zero value for their corresponding contact type in the Assigned Contact Types list.
Delete	Delete the selected multiplicity presentation class. You can delete only an updated or completed multiplicity presentation class.
Create New	Create a new multiplicity presentation class.
Submit	Save changes to the selected multiplicity presentation class.

Deleting a multiplicity presentation class

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Ensure that the multiplicity presentation class is not assigned to an agent.

About this task

Delete a multiplicity presentation class that is no longer required to save room in your database.

Procedure

1. In the left pane, expand the server from which to delete the multiplicity presentation class.
2. Select the **Multiplicity Presentation Classes** folder.
3. In the right pane, in the **MPC List** list, select the multiplicity presentation class to delete.
4. Press **Delete**.
5. On the **Confirm Delete** message box, click **Yes** to delete the multiplicity presentation class.

Chapter 26: Contact types

Contact types are the media types by which (inbound) contacts arrive into a contact center and by which a contact center sends (outbound) contacts.

A contact type determines how a contact center handles contacts. An example is email: when a contact center customer sends an email message, the contact center receives the message, and routes the message according to various email-specific rules. If required, an agent with email ability processes the email message.

The following table lists the default supported contact types for Avaya Contact Center Select.

Table 2: Contact types

Default contact type	Skillset prefix	Description
Voice	None	Default Voice Contact Type
Email	EM_	Default CCMM email Contact Type
Fax message	FX_	Default CCMM Fax message Contact Type
Scanned Document message	SD_	Default CCMM Scanned Document message Contact Type
SMS Text message	SM_	Default CCMM SMS Text message Contact Type
Voice Mail message	VM_	Default CCMM Voice Mail message Contact Type
Web_Communications	WC_	Default CCMM Web communication Contact Type
Outbound	OB_	Default CCMM Outbound Contact Type

Editing a contact type

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Note the following:
  - You cannot delete a default contact type.
  - You cannot edit the contact type name or the skillset prefix.

About this task

Edit a contact type to change the description of the contact type or to change the default skillset assigned to that contact type.

Procedure

1. In the system tree, expand the server on which you need to edit the contact type.

   The server displays the server resources.
2. Select the **Contact Types** folder.
3. In the right pane, select the Contact Type to edit.
4. To sort the contact types, click a column header.

   For example, if you click the Name column header, the contact types are sorted alphabetically according to Contact Type name.
5. From the **Default Skillset** list, select a new default skillset, and then press Tab.
6. In the **Description** box, type a new description for the contact type.
7. Click any other row in the grid to save your changes.

Variable definitions

Name	Description
Name	The name of the contact type. **Important:** You cannot modify contact type names.
Skillset Prefix	The prefix that identifies the default skillset that handles contacts of this contact type. There is no skillset prefix for the default contact type, voice. Skillsets without a skillset prefix default to the voice contact type. Valid value: 3-character maximum, the last of which must be an underscore (_) (no special characters, must be unique) **Important:** You cannot modify a skillset prefix for a default contact type.
Default Skillset	Select the skillset to which contacts route for processing when they are not handled in a script. Valid values: 30-character maximum, no special characters allowed.

Name	Description
	Important: This field is optional and must be unique. You must first configure the default skillset in Contact Center Manager Administration. The default skillset must have the same skillset prefix as the contact type.
Description	The description for the contact type. Valid value: Maximum 60 characters (optional, can be updated, special characters are allowed).

Chapter 27: Global settings

In the Global Settings window, you can configure the global values on the Contact Center server, which include Agent Order preference, default DN, and the Expected Wait Time algorithm. You can also configure Toll Free Queuing.

Configuring global settings

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

In the Global Settings window, you can set the global values on the Contact Center server.

The Redirection Settings tab allows you to configure global settings for call redirection. How your contact center handles redirected calls depends on your solution and your solution's available routing options. For more information about call redirection, see *Call Redirection with AACC Application Note*, available at http://support.avaya.com.

Procedure

1. In the left pane, expand the server on which to configure global settings.
2. Select the **Global Settings** folder.
3. Configure the global settings for your system based on the fields listed in the Global Settings window.
4. Click **Submit**.

Variable definitions

Name	Description
Agent Order Preference	Choose how to present contacts to agents based on their idle time.

Name	Description
	Valid values: • Longest total time in idle state since login—Choose this option to present contacts to the agent who accumulated the most idle time since logging on. Contact Center calculates this time differently for an agent with a Multiplicity Presentation Class (MPC) who has one or more open contacts. In this case Contact Center uses the time since the agent last opened a contact, minus the Delay value in the MPC. • Longest time in idle state since last status change—Choose this option to present contacts to the agent who accumulated the most idle time since the last status change for that agent (this is the system default setting). • Longest total time since last CDN/ACD call or contact—Choose this option to present contacts to the agent with the longest elapsed time since handling a CDN/ACD call. **Important:** The system does not reset the timer when the agent switches to the Not Ready state.
Default DN	The default DN to use when a script defaults or a treated call is not answered. Avaya recommends that you configure an attendant as the Default DN. **Note:** By default, the Default DN is configured as the first sample supervisor. If a call cannot be routed to a skillset, Contact Center presents the call to the sample supervisor.
Expected Wait time (EWT) Algorithm	Select either NES EWT or Enhanced EWT as required. Valid values: • NES EWT—This is a legacy algorithm for calculating the expected wait time using real data available in the system. (Actual wait time of previously serviced contacts.) • Enhanced EWT—This is a new algorithm, which is more accurate than the NES EWT. This also uses actual wait time data available in the system.
Toll Free Queuing	Select to enable Toll Free Queuing.

Name	Description
Maximum time to delay call establish	Enter the number of seconds that Contact Center waits before sending a call connect message to the IP Office platform.
Enter ACW using Not Ready without Reason Code	When you select **Enter ACW using Not Ready without Reason Code**, agents who do not specifically enter an After Call Work Item (ACW) code prior to the end of their current call are put into the ACW state automatically by the system using the default ACW code “00000” immediately upon completion of the call. Post Call Processing (PCP) time starts to peg against the default ACW code “00000” immediately after agents completes the contact.

Chapter 28: Historical statistics

To use the Historical Reporting component, you must first collect historical statistics. You can configure the following historical statistics collection options:

- the general system parameter values, such as the number of skillsets
- the type of call flow, agent, and IVR historical statistics to collect
- the applications for which call-by-call data is collected
- the length of time that historical statistics are stored on Contact Center Manager Server

You can calculate the amount of disk space required to run your selected configuration, and you can specify the first business day of the week.

These statistics are used to generate tabular and graphical historical reports.

Integrated Reporting

An integrated report simplifies the comparison of reports on call statistics data by combining data from the Avaya Media Server/CCMS(Avaya Media Server/CSR report) and CCMS/Multimedia server. Combined reporting views are available for:

- CCMM—CSR Statistics
- Avaya Media Server—CSR Statistics

Configuring Historical statistics

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Configure Historical statistics to configure the following collection options:

- the general system parameter values, such as the number of skillsets
- the type of call flow, agent, and IVR historical statistics to be collected

- the applications for which call-by-call data is collected
- the length of time that historical statistics store on Contact Center Manager Server

Procedure

1. In the left pane, select the **Historical Statistics** folder.
2. In the right-pane, enter your configuration data in the following tables:
   - Parameters table—For each parameter, type the value to configure, ensuring that the value is less than or equal to the purchased value, and greater than or equal to the measured value. When choosing a value, remember to allow for future growth.
   - Collect the following statistics table—For each statistic type, in the Collect column, select the check box beside the statistics to collect, or clear the check box beside the statistics not to collect.
   - Call-by-Call table—For each application, from the Statistics Collection Method list, select the type of contacts for which to collect call-by-call statistics.
   - Duration table—For each type of statistic, enter the amount of time the statistic is stored on the server.
3. From the **Business week starts** list, select the day on which to start accumulating weekly statistics.
4. Click **Calculate** to determine if sufficient disk space exists for the selected historical statistics collection configuration. The Call-by-Call Database and System Database Required boxes display the disk space requirements for the selected configuration. The Call-by-Call Database and the System Database Actual boxes display the available disk space.

   Important:

   If the disk space required is greater than the disk space available, you must lower the number of days the data is stored, or you must change the number of estimated contacts per hour until sufficient disk space exists for your configuration.
5. Click **Submit** to save your changes.

Comments? infodev@avaya.com

Chapter 29: Real-time statistics

The Contact Center Manager Administration Real-Time Reporting displays provide up-to-date statistics for your Contact Center and its resources. With access to statistics that update in real time, such as the number of contacts waiting to be answered, the number of agents assigned to each skillset, and the number of abandoned calls, you can view changes in contact activity as they occur.

To use the Real-Time Reporting feature, you must first configure Contact Center Manager Server to collect the types of statistics to see in the Real-Time Reporting displays. You can configure the following seven types of real-time statistics:

- skillset statistics (mandatory)
- nodal statistics (mandatory)
- application statistics
- IVR statistics
- route statistics
- agent statistics
- network statistics

For each type of real-time statistics you must indicate the viewing mode (moving window or interval-to-date). The interval-to-date settings that you choose start immediately and apply to all real-time displays at all sites on your network that use the interval-to-date mode.

Configuring real-time statistics collection

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Configure real-time statistics collection to provide information for real-time displays with access to statistics that update in real time. You can configure the following types of real-time statistics:

- skillset statistics (mandatory)
- nodal statistics (mandatory)
- application statistics

- IVR statistics
- route statistics
- agent statistics
- network statistics

For each of these real-time statistics, you must indicate the viewing mode (moving window or interval-to-date). The interval-to-date settings that you choose start immediately and apply to all real-time displays at all sites on your network that use the interval-to-date mode.

When you configure the interval-to-date real time statistics display, there are two required fields: Data Collection Interval and One of the intervals starts at.

The interval statistics reset after the Data Collection Interval. The One of the intervals starts at option is used to synchronize the initial interval. For example, if you configure the real-time data at 1 p.m. on April 2, and the Data Collection Interval is 15 hours, and the One of the intervals starts at 8 a.m., the real time statistics are reset and the system starts collecting interval data at 11 p. m. (0800 + 1500). The statistics are next reset at 2 p.m. (15 hours later) on April 3. The statistics do not reset at 8 a.m. on April 3 unless you designate an appropriate interval.

Procedure

1. In the left pane, expand the server on which to configure the real-time statistics.
2. Click the **Real-time Statistics** folder.
3. In the right pane, select the viewing mode for the following statistics:
   - Skillset Statistics—You must select a viewing mode value for this statistic. The system automatically collects this statistic because it is required for intrinsics in writing scripts.
   - Nodal—You must select a viewing mode for this statistic. The system automatically collects this statistic because it is required for intrinsics in writing scripts.
   - Application Statistics—Optional
   - IVR Statistics—Optional
   - Route Statistics—Optional
   - Agent Statistics—Optional
   - Network Statistics—Optional
4. In the **Data Collection Interval** boxes, type the interval duration to use in the interval-to-date data collection mode.
5. In the **One of the intervals starts at** box, type the start time for statistics collection in the interval-to-date collection mode.

   The system calculates and synchronizes the days remaining intervals based on the time that you specify. Your changes take effect immediately.
6. Under **Minimum Refresh rates**, in the **Agent Real-time Displays** box, type the minimum refresh rate in seconds for Agent Real-time Displays.
7. In the **Other Real-time Displays** box, type the minimum refresh rate in seconds for all other Real-time Displays.

8. Click **Submit** to save your changes.

Chapter 30: Dialed number identification services

A dialed number identification service (DNIS) is an optional service that allows Avaya Contact Center Select to identify the phone number dialed by the incoming caller, and then use the dialed number to route the call to an appropriate skillset. An agent can receive calls from customers calling in to different DNISs and can prepare a response according to the DNIS.

Avaya Contact Center Select uses direct dial-in (DDI) information it receives from IP Office to route calls to appropriate skillsets or agents based on DNIS numbers.

Configuring a DNIS

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Configure your DNIS numbers on IP Office. You must add DNIS numbers as Incoming Call Route numbers on IP Office and add an IP Office short code (Contact Center Route Point or CDN) as a destination for each Incoming Call Route number that you configure. For more information about configuring DNIS numbers on IP Office, see *Avaya Contact Center Select Advanced Administration*.

About this task

A Dialed Number Identification Service (DNIS) is a method by which the system recognizes the phone number that a caller dials. Agents can receive contacts from customers calling in on different DNISs and customize their response according to the DNIS. Based on the DNIS, the system can direct contacts to a controlled CDN and supply different treatments.

You cannot modify a saved DNIS. You can delete a saved DNIS and add a new DNIS.

Procedure

1. In the left pane, expand the server on which to add the DNIS.
2. Select the **DNISs** folder.
3. In **Name** box, type the name of the new DNIS as you want it to appear in reports.
4. In the **Number** box, type the DNIS number.
5. In the **URI** box, type a URI for the DNIS and press **Tab**.

Important:

The URI must be unique to URIs currently assigned to other DNISs, CDNs, or agents and must not begin with SIP.

6. In the **Service Level Threshold** box, type the time in seconds within which all contacts coming in on this DNIS must be answered or abandoned. The threshold value is used for historical reporting.
7. In the **Description** box, type the description of the DNIS. For example, type the DNIS prefix. You can use the description to sort, filter, and group individual DNIS numbers in user-created, custom historical reports.
8. Click any other row in the grid to save the DNIS.

Variable definitions

Name	Description
Name	The name of the DNIS as you want it to appear in reports. Valid values: 30-character maximum (no special characters)
Number	The number assigned to the DNIS. This is the directory number at which the contact arrives at the switch. **Important:** You cannot change a saved DNIS. You must delete the DNIS and then recreate it. Valid values: 31-digit maximum. Avaya recommends that you enter only 30 digits, as callers can use the pound sign (#) as a delimiter, and this counts towards the 31-digit limit.
URI	In the URI box, type the Universal Resource Identifier (URI) of the DNIS. Valid values: maximum 255 characters, including numbers, English characters, /, \, ?, &, periods, ‘@’ symbol, underscores, and dashes. This field is mandatory. Once you save the URI, you cannot modify it. The URI must be unique to URIs assigned to other DNISs, CDNs, or agents and must not begin with SIP.
Service Level Threshold	The service level threshold assigned to the DNIS. This is the time, in seconds, in which all contacts coming through on this DNIS are to be answered or abandoned.

Name	Description
	Valid values: 4-digit maximum
Description	The description of the DNIS number. For example, type a DNIS prefix, such as 1-800. You can use this description to sort, to filter and to group individual DNIS numbers in user-created custom reports. Valid values: maximum 16 characters

Chapter 31: Formulas

Use the Formulas window to create custom real-time statistics fields by combining existing statistics fields with mathematical operators. You can save these custom statistics fields as formulas and use them in your private Real-Time Reporting displays. For example, you can create a custom formula to calculate the service level.

Creating a custom formula

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

About this task

Create a custom formula to create custom real-time statistics fields by combining existing statistics fields with mathematical operators. You can then save these custom statistics fields as formulas and use the formulas in your private Real-Time Reporting displays.

Procedure

1. In the left pane, expand the server on which to create the formula.
2. Select the **Formulas** folder.
3. In the right pane, in the **Available Formulas** box, type the name of the new formula, and then press Tab.
4. From the **Statistics Group** list, select the statistics group that contains the statistics field to include in your formula.
5. Press **Tab** or **Enter** to display the **Formula Editor**.
6. In the Formula Editor, in the **Comment** box, type information about the formula (optional).
7. From the **Variables** list, select the variable to use in the formula.

   Important:

   When you select a variable, it appears in the Formula box with a percent symbol (%) preceding it. The percent symbol identifies it as a variable; it is not a mathematical operator.

8. From the numeric keypad, select any numeric input to apply to the formula.

9. After you select a mathematical operator, you can select another variable to add to the formula. For example a formula for service level is Calls Answered – Calls Answered Aft Threshold / Calls Answered. The formula can be up to 250 characters.
10. To use the higher or lower of two values in your formula, click **Max** or **Min**.
11. After you finish creating the formula, click **Save**.
12. Click **Close** to return to the Formulas window.

Variable definitions

Name	Description
Available Formulas	Type a name for the custom formula and then press Tab to select the Statistics Group for the formula. To edit an existing formula, double-click the formula name in the Available Formulas column. The Formula Editor appears, listing the Formula components.
Statistics Group	Select the statistic group for the formula. Statistics groups are sets of related statistics defined in the database, such as agent statistics or skillset statistics. After you select the statistics group, press Enter or Tab. The Formula Editor appears, in which you can create your custom formula.
Formula Name	The name of the formula, as you entered it in the Available Formulas box in the Formulas window. You can change formula name in the Formula Editor.
Comment	Type any additional information about your custom formula.
Formula	The variables and mathematical operators that you choose for your custom formula. You can add new variables and operators, or edit the existing ones.
Variables	The existing statistics fields that you can combine to create custom formulas. After you create a formula, you can apply it to your private Real-Time Reporting displays to control the type of data that you see. From the Variables list, select the variables to add to your custom formula. After you select a variable, you must choose a mathematical operator (/, *, -, or +) before you can select another variable, or before you can enter any numeric values. When you select a variable, it appears in the Formula box with a percent symbol (%) preceding it.

Name	Description
	The percent symbol identifies it as a variable; it is not a mathematical operator.
Numeric keypad	**Important:** After each variable, you must select a mathematical operator before you can select another variable. • Back Space — Removes the last item that you enter in your formula. To remove more items, you must click C to clear the entire formula. • C — Clears the entire formula from the Formula box. • / — Divides the variables in the formula. • * — Multiplies the variables in the formula. • - — Subtracts the variables in the formula. • + — Adds the variables in the formula. • , — Separates the Max and Min variables in the formula.
Max and Min	Use the Max and Min buttons to use the higher of two values (Max), or the lower of two values (Min) in your formula. When you click Max or Min, a set of brackets appears in the Formula box. In these brackets, add the two values to compare, separated by a comma. The format must be as follows: Max[a,b], where a can be one variable, or two variables separated by an operator, and b can be one variable, or two variables separated by an operator. For example, if you specify Max[Agent_Available +Agent_Not_Ready, Agent_In_Service +Agent_On_This_Skillset_Call], the system calculates the values for Agent_Available +Agent_Not_Ready and for Agent_In_Service +Agent_On_This_Skillset_Call, and uses the higher of the two values in the formula. If you use Min in this example, the system calculates the lower of the two values.
Save	Save changes you make in the Formula Editor.
Close	Exit the Formula Editor.

Editing or viewing formulas

Before you begin

- Create at least one custom formula.

About this task

You cannot edit standard formulas; you can edit only custom formulas.

Procedure

1. In the left pane, expand the server containing the formula you want to edit.
2. Select the **Formulas** folder.
3. In the right pane, in the **Available Formulas** column, double-click the name of the formula to edit.
4. In the Formula Editor, you can modify the formula name, the formula comment, and the formula.
5. To add a new variable to an existing formula, you must click an operator (/, *, −, +) to add it to the end of the formula, and then select the new variable from the **Variables** list.
6. To delete elements from the formula, in the **Formula** box, select the elements, and then press **Delete**.
7. After you finish your changes, click **Save** to save the formula.
8. Click **Close** to close the Formula Editor.

Chapter 32: Media servers

Contact Center uses Avaya Media Server media processing capabilities to support announcements and dialogs. Avaya Media Server is automatically configured in Contact Center Manager Administration as a Media Server. Avaya Media Server provides some default media for standard ringback and busy tones. Additional media for recorded announcements (RAN) and music on hold must be provisioned in order for Avaya Media Server to provide meaningful media to the customer.

Verifying the media server details

Before you begin

- Log on to Contact Center Manager Administration (CCMA).
- Open the Configuration component.

About this task

Contact Center uses Avaya Media Server (Avaya MS) media processing capabilities. Contact Center automatically configures each Avaya MS in a Contact Center as a Media Server. Contact Center automatically populates the Avaya MS server details, such as the server name and IP address, in CCMA.

Verify the media server details in CCMA are correct.

Procedure

1. In the left pane, expand the server on which to view your Media Server.

   The server expands to show its resources.

2. Select the **Media Servers** folder.
3. In the right pane, verify the media server details are correct.

   If the Avaya MS server details are incorrect, update the Avaya MS server details.

   Note:

   For the Linux version of Avaya Media Server, which is the version available in a software appliance deployment, the default port number is 5060. For the Windows version of Avaya Media Server, which is the version available in a hardware appliance deployment or DVD install, the default port number is 5070.

4. If this Avaya Media Server is going to manage prompts, ensure that the **Master Content Store** checkbox is selected. If your solution implements Business Continuity, select the **Master Content Store** checkbox for the Avaya Media Server of the active server. Avaya Contact Center Select supports only one Master Content Store.

Chapter 33: Contact Center Management fundamentals

Contact Center Management contains the following main data views:

- Supervisors view
- Agents view
- Skillsets view
- Assignments view

You can use Contact Center Management to perform the following tasks:

- Add, edit, view, or delete users defined in Contact Center Manager Server.
- Add, edit, view, or delete agent-to-supervisor assignments.
- Add, edit, view, or delete agent-to-skillset assignments.
- View the schedule of all agent-to-skillset and agent-to-supervisor assignments.
- Run user-defined assignments on an ad hoc basis.
- Apply assignment changes to multiple agents simultaneously.
- Display agent logon status in Agents, Supervisors, Skillsets and Assignments and Agent Details views.
- Search by agent logged in or logged out status.
- Assign an agent to default queue management.
- Use Contact Center Management to quickly assign agents to existing partitions instead of opening the Access and Partition Management component.

To add a user (agent or supervisor/agent), you must use the Contact Center Management component or the Configuration Tool spreadsheet in the Configuration component. Supervisor/agents can also be Contact Center Manager Administration (CCMA) users and can have a CCMA user ID and password to access the CCMA client application; however, many supervisor/agent users do not use CCMA.

Force Agent Log out and Change Agent Status

The Force Agent Log out feature allows a supervisor to remotely log an agent out of Contact Center from the Contact Center Manager Administration (CCMA) user interface. This allows supervisors to log out agents who forget to log out or to go not-ready at the end of their shift.

Important:

Use the option to log out an agent only in exceptional circumstances, where there is no other option. If an agent has active contacts and a supervisor forces them to log out, Agent Desktop shuts down: in certain scenarios this leaves their active contacts in an incorrect state. The following use cases indicate situations in which a supervisor uses the force log out feature:

- An agent falls sick at work, and transfers their current contacts, but leaves their desk without logging off. A locked screensaver prevents anyone accessing their desktop to close Agent Desktop. The supervisor forces this agent to log off, and there is no impact to customer contacts.

The supervisor can also force an agent state change to toggle it between Ready or Not Ready. When they force an agent into the Not Ready state, supervisors have the option to enter a Not Ready Reason code for the agent. The following use cases indicate situations in which a supervisor chooses to force an agent state change:

- A trainee agent goes Not Ready, entering a reason code of At_Lunch. They return from lunch but forget to reset their status to Ready. Their supervisor can see that they are at their desk, and also that they show Not Ready on the Real time Display (RTD). The supervisor uses the Change State button to make the agent Ready.
- A trainee agent leaves their desk for lunch, but forgets to set their status to Not Ready. Contacts continue to alert on their Agent Desktop. The supervisor notices that the agent is not at their desk, and that they show Ready on the RTD. The supervisor uses the Change State button to make the agent Not Ready.

When a supervisor logs out an agent, or changes the agent's status, the agent receives a notification in Agent Desktop. With normal usage of the Force Agent Log out option, this is not required, because the agent is not present at their desktop. However, if a supervisor accidentally selects the wrong agent to log out, this notification gives the agent a time period in which to gracefully complete their active contacts. This time period is configurable in Multimedia Administration. If the agent has an active voice contact, they are able to continue the call on their physical phoneset after Agent Desktop closes; where the agent is using the Agent Desktop softphone, this is not possible and the voice contact drops.

Administrators can use a new Access and Partition management setting to restrict access to the Force Agent Log out feature. A new Force Agent State Change access privilege controls access to Force Agent Log out and Change Agent State. Only supervisors who have the Force Agent State Change privelege can use the feature, and supervisors can log out or change the state of only those agents that they can see in their partition.

Supervisors access the Force Agent Log out feature either from an agent Real-Time Display (RTD) or from the Contact Center Management user interface. From the CCM interface, Force Agent Log

out enables a supervisor to log out a single agent or a group of agents. Changing an agent's ready state is possible only from a Real Time Display (RTD).

The columns that display the Force Agent Log out and Change State buttons on an RTD are optional, and are not available on the standard RTDs. To use the buttons, supervisors must create a private RTD with the Change State and Logout columns included. While a supervisor can make public an RTD with these columns, supervisors viewing the public RTD cannot use the buttons if they do not have the "Force Agent State Change" access privilege.

The CCMA audit trail records both the force logout and the force state change events. The audit details the time at which the event happened, the agent that the supervisor modified, and the CCMA user id of the supervisor who carried out the action.

Chapter 34: Agents

In the Agents view, you can search for particular agents or list all agents on a server. You can also use the agents view to

- view and edit the agents' properties, including the skillsets and partitions to which the agents are assigned
- delete the agents from the server one at a time or in bulk
- quickly create a new agent by copying an agent's properties
- log out an agent or multiple agents

Partly configured agents appear in the Contact Center Management Agents list with a grey agent icon. You can only delete these agents.

Two types of agents are available in Contact Center Management:

- Agents
- Supervisor/agents

Important:

After you add agents, ensure that you synchronize the updated data to IP Office. For more information, see Synchronizing data to IP Office manually on page 91.

Adding an agent

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.
- If you want to associate an agent with a domain account, you must first add the server to a domain.

About this task

Complete this procedure to add an agent in Contact Center Management.

If you click Create Copy while viewing an existing agent, the window appears and the User Details and User Information sections expand and contain some information from the copied agent profile.

Procedure

1. In the left pane, click the **CC** server.
2. From the **Add** menu, select **Agent**.
3. In the New Agent Details window, enter the following mandatory information about the agent:
   - First name
   - Last name
   - Login ID
   - Call presentation class
   - Multiplicity presentation class
   - Threshold
   - Primary supervisor
4. Enter any optional information about the agent (for example, Call Presentation Class, Threshold, Title, Department, or Comments).
5. Under **Windows User Account Details**, select **Workgroup** or **Domain**. If your solution implements the Business Continuity feature, the **Domain** option is available only.
6. If you select **Workgroup**:
   a. In the **Password** box, type the password for the new local Windows user account associated with this agent.
   b. In the **Confirm Password** box, retype the password.
7. If you select **Domain**:

   In the **User name** box, type the name of the agent's domain user account in the format DomainName\UserAccountName. This domain account is associated with the agent.

   Important:

   You must ensure that you associate the agent with a correct and valid domain user account.
8. If this agent uses the multiplicity feature on Agent Desktop, select a multiplicity presentation class from the **Multiplicity Presentation Class** list.

   If multiplicity is not enabled, the Multiplicity Presentation Class list does not appear.
9. Click the **Offsite Agent** heading, if you want to allow the agent to log on to Agent Desktop in Other Phone mode.

   Note:

   If Offsite Agent is not enabled, the **Offsite Agent** heading does not appear. For more information about enabling licensed features, see *Avaya Contact Center Select Advanced Administration*.
10. To enable Offsite Agent, from the **Offsite Agent Allowed** list, select **Optional** or **Mandatory** and complete the related Offsite Agent fields.

11. Click the **Contact Types** heading.
12. Select the check box beside each **Contact Type** to assign to the agent.
13. Click the **Skillsets** heading.
14. In the **Skillsets** area, click **List All** to list all skillsets configured on the server.
15. From the **Priority** list for each skillset to assign to the agent, select the priority level or select **Standby** to put the agent in standby mode for this skillset.

    Priority levels range from 1 to 48 and from Standby (1) to Standby (48), with 1 being the highest priority for the skillset.

    Important:

    You can only assign skillsets to an agent that belongs to the same contact type.
16. Click the **Partitions** heading.

    The list of partitions configured on the server appears.
17. Select the check boxes beside the partitions to which to add the new agent.
18. Click **Submit** to save your changes.

Variable definitions

Name	Description
First Name	The first name of the user. The first name is mandatory for all users and can be a maximum of 30 characters long.
Last Name	The last name of the user. The last name is mandatory for all users and can be a maximum of 30 characters long.
Title	The title for the user. The title is optional and can be up to 40 characters long.
Department	The user's department. The department is optional and can be up to 40 characters long.
Language	Select the language preference for the user. Language selection is mandatory for all users.
Comment	Comments you have about the user. Comments are optional and can be up to 127 characters in length.
User Type	Select the user type. This value is mandatory. Select the agent user type. Agents are users who are assigned skillsets and who answer contacts in the Contact Center. All agents must be assigned to a supervisor.

Name	Description
Login ID	The number that the user enters to log on to the phone. This value is mandatory for all users.
Voice URI	A unique identifier used to identify each user in the contact center, in the format <Login ID>:<SIP domain name>. This field is automatically populated and is read-only.
Windows User Account Details — Password (Workgroup only)	The password for the local Windows user account created on the server when you add an agent. The account is automatically associated with the agent.
Windows User Account Details — User name (Domain only)	The domain user account to associate with the agent, in the format DomainName \UserAccountName. **Important:** The account details must be correct. Agents cannot log on to Agent Desktop if you type the account details incorrectly.
Primary Supervisor	The agent's supervisor. You can choose from all supervisors configured on the server to which you are currently logged on.
Call Presentation	The call presentation class to assign to this agent. The call presentation class determines whether the agent can take a break between calls, or whether the agent can put DN calls on hold for incoming routed calls. Call Presentation is mandatory for all users with agent and supervisor/agent capability.
Multiplicity Presentation Class	The multiplicity presentation class to assign to this agent. The multiplicity presentation class determines the type and number of Multimedia contacts an agent can have open simultaneously on Agent Desktop.
Threshold	The threshold class to assign to this user. The threshold class is mandatory for all users with agent and supervisor/agent capability.
Offsite Agent Allowed	Select one of the following options: • **Disabled**: This option disables Offsite Agent for this agent. • **Optional**: This option allows the agent to log on to Agent Desktop in Deskphone mode or in Other Phone mode. • **Mandatory**: This option forces the agent to log on to Agent Desktop in Other Phone mode.

Name	Description
Phone 1	The primary telephone number at which this agent receives calls from Contact Center when logged on to Agent Desktop in Other Phone mode. The phone number has a maximum of 15 digits.
Phone 2	The secondary telephone number at which this agent receives calls from Contact Center when logged on to Agent Desktop in Other Phone mode. The phone number has a maximum of 15 digits.
Allow agent to enter an alternate phone	Select to allow the agent to enter an alternate number to the numbers configured as Phone 1 or Phone 2. The agent can enter a different number when they log on to Agent Desktop in Other Phone mode.

Adding a Supervisor/Agent

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.
- If you want to associate a Supervisor/Agent with a domain account, you must first add the server to a domain.

About this task

A user with Supervisor/Agent capabilities is assigned skillsets and can answer contacts in Contact Center. A Supervisor/Agent can perform some of the duties of a regular supervisor, such as monitor real-time displays in Contact Center Manager Administration, and answer agent queries. All Supervisor/Agents must be assigned to a supervisor. If the supervisor/agent is going to use CCMA, you must also assign a Contact Center Manager Administration user ID and password to this user.

Procedure

1. In the left pane, click the **CC** server.
2. From the **Add** menu, select **Supervisor/Agent**.
3. In the New Supervisor/Agent Details window, enter the following mandatory information about the supervisor/agent:
   - First name
   - Last name
   - Login ID
   - Call presentation class
   - Multiplicity presentation class

Comments? infodev@avaya.com

- Threshold
- Primary supervisor

4. Enter any optional information about the supervisor/agent (for example, Title or Department).
5. If the supervisor/agent is going to use CCMA, under **CCMA Login Account Details**, type the account name used to log on to CCMA in the **User ID** box.
6. In the **Password** box, type the password for the account. Passwords must be at least 8 characters long and no more than 20 characters long, and include at least 1 number, at least 1 uppercase letter, at least 1 lowercase letter, and no spaces.
7. Under **Windows User Account Details**, select **Workgroup** or **Domain**. If your solution implements the Business Continuity feature, the **Domain** option is available only.
8. If you select **Workgroup**:
   a. In the **Password** box, type the password for the new local Windows user account associated with this Supervisor/Agent.
   b. In the **Confirm Password** box, retype the password.
9. If you select **Domain**:

   In the **User name** box, type the name of the agent's domain user account in the format DomainName\UserAccountName. This domain account is associated with the Supervisor/Agent.

   Important:

   You must ensure that you associate the Supervisor/Agent with a correct and valid domain user account.
10. Click the **Offsite Agent** heading, if you want to allow the agent to log on to Agent Desktop in Other Phone mode.

    Note:

    If Offsite Agent is not enabled, the **Offsite Agent** heading does not appear. For more information about enabling licensed features, see *Avaya Contact Center Select Advanced Administration*.
11. To enable Offsite Agent, from the **Offsite Agent Allowed** list, select **Optional** or **Mandatory** and complete the related Offsite Agent fields.
12. Click the **Contact Types** heading.
13. Select the check box beside each **Contact Type** to assign to the agent.
14. Click the **Skillsets** heading.
15. In the **Skillsets** area, click **List All** to list all skillsets configured on the server.
16. In the table listing all skillsets, select the priority numbers beside the skillsets to which you want to assign the supervisor/agent, or select Standby to put the supervisor/agent in standby mode for this skillset.

Skillset priority can range from 1 to 48 and from Standby (1) to Standby (48), with 1 being the highest priority for this skillset.

17. Click the **Partitions** heading.

    The list of user-defined partitions configured on the server appears.

18. Select the check box for each partition to which you want to add the new supervisor/agent.
19. Click **Submit** to save the new user profile.

Creating an agent/supervisor assignment

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.
- Ensure that you have access to the New Agent to Supervisor Assignment window.
- Ensure that you understand reset assignments. For information, see Creating a reset assignment on page 179.

About this task

Create agent-to-supervisor assignments to temporarily assign multiple agents to a different supervisor when supervisors are on breaks, are sick, are on vacation, or are taking a course.

Procedure

1. In Contact Center Management, on the menu, choose **View/Edit** > **Assignments**.
2. In the left pane of the Assignments view, expand the server on which to assign agents to skillsets.

   The server shows the assignment folders.

3. Right-click the Agent Supervisor Assignments folder, and then click **Add Assignment**.
4. In the New Agent to Supervisor Assignment window, in the **Assignment Details** area, click the **List Available Agents** heading to search for agents to add to the assignment.

   The heading expands to show the agent search boxes.

   You can search for agents by first name, last name, department, comment, or login ID. You can also search by the current agent login status (Logged In or Logged Out).

5. Enter your search details up to a maximum of five different criteria.
6. Click **Search**.

   The agents that match your criteria appear in a table.

   If you search by login status, you can search by this one criterion only.

7. To list all agents configured on the server (your partitioned agents and any agents in the reporting agent combinations assigned to you), click **List All**.

8. In the **Available Agents** table, note the agents logged on, and then select the check box for each agent to include in the assignment.
9. Click **Update Table**.

   The agents with their currently assigned skillsets appear in the Assignment Details table.
10. Click the **Save/Schedule Assignments** heading.
11. In the **Save Assignment As** box, type a unique name for the assignment.
12. Select the **Create Reset Assignment** check box to create a reset assignment.
13. Click **Save** to save the reset assignment before altering the original assignment.
14. Click **Save Assignment** to save the assignment in the Assignments folder.

Deleting an agent

Before you begin

- Ensure that the agent is logged out.
- Ensure the agent is not referred to in scripts.
- Log on to CCMA.
- Open the Contact Center Management component.

About this task

Several options are available to delete an agent or a supervisor/agent. This procedure lists one possible way.

Procedure

1. From the **View/Edit** menu, select **Supervisors**.
2. In the left pane, click the server containing the agent to delete.
3. Click the agent's primary supervisor.

   All agents assigned to the supervisor appear.
4. Right-click the agent to delete, and then click **Delete Agent**.
5. In the message box that appears asking you to confirm your choice, click **Yes**.

Logging out multiple agents from the Agents list

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

Use this procedure to force log out multiple agents.

Important:

Forcing multiple agents to log out can have a detrimental effect to contact center operation. Consider this option only in exceptional circumstances where there is no alternative method of logging out these agents. If an agent has active contacts and you force them to log out, Agent Desktop closes, and this can leave their active contacts in an incorrect state.

Procedure

1. From the **View/Edit** menu, select **Agents**.
2. In the left pane, click the **CC** server.
3. In the list of agents, select each agent that you want to log off.
4. Click **Logout**.
5. On the **Message from Webpage** dialog box, click **OK**.

   Contact Center logs out the agents, and displays a message on the agents' Agent Desktop interfaces informing them that a supervisor has logged them out.

Logging out an agent from the Agent Details screen

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

Use this procedure to force log out a single agent.

Important:

Use Force Agent Log out only in exceptional circumstances, where there is no other option to log out an agent. If an agent has active contacts and you force them to log out, Agent Desktop closes, and this can leave their active contacts in an incorrect state.

Procedure

1. From the **View/Edit** menu, select **Agents**.
2. In the left pane, click the **CC** server.
3. In the list of agents, double click the agent that you want to log off.

   CCMA displays the Agent Details screen.
4. On the **Agent Details** window, in the **Agent Information** section, check the status of the agent in the **Login Status** field.

Comments? infodev@avaya.com

5. Click the **Logout Agent**.
6. On the confirmation dialog box, click **Yes**.

   Contact Center logs out the agent, and displays a message on the agent's Agent Desktop interface informing them that a supervisor has logged them out.

Modifying agent details

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

Complete this procedure to edit the details of an agent or supervisor/agent.

Procedure

1. From the **View/Edit** menu, select **Supervisors**.
2. In the left pane, click the **CC** server.

   The list of supervisors configured on the server appears.
3. Click the supervisor to whom the agent is assigned.

   The tree expands to show the list of agents assigned to this supervisor.
4. Right-click the agent whose profile you want to edit, and then select **View Agent Details**.
5. On the Agent Details window, in the **User Details** and **Agent Information** sections, you can change agent details, such as first name, last name, User Type, login ID, primary supervisor, call presentation, multiplicity presentation class, threshold, title, department, or comments.
6. If you change the **User Type** from **Agent** to **Supervisor/Agent**, you can enter a Contact Center Manager Administration user ID and password for the supervisor/agent.

   The supervisor/agent can now log on to Contact Center Manager Administration using this account.
7. To change the current skillset assignment or assign the agent to new skillsets, click the **Skillsets** heading.

   The list of currently assigned skillsets appears.
8. To change the priority level for a skillset, in the table of assigned skillsets, from the **Priority** list, select a new priority level.
9. To assign the agent to new skillsets, click **List All** to list all skillsets configured on the server.
10. In the table listing all skillsets, from the **Priority** list, select the priority level for each skillsets to which you want to assign the agent.

OR

Select Standby to put the agent in standby mode for this skillset.

Skillset priority levels range from 1 to 48 and from Standby (1) to Standby (48), with 1 being the highest priority for this skillset.

11. If you have administrator privileges and you reassigned this agent to a new supervisor, you can now add this agent to the user-defined partitions assigned to the agent's supervisor (instead of having to do so in Access and Partition Management). Click the **Partitions** heading.

    The list of user-defined partitions configured on the server appears.

12. Select the check box for each partition to which you want to add the agent.
13. Click **Submit** to save your changes.

Copying agent properties

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

There are several ways to copy an agent's properties. This procedure lists one possible way. You can also right-click an agent name in the system tree, and then click Create Copy from the resulting pop-up menu.

You can create new agents quickly by copying the properties of existing agents. New agents assume the following properties from the existing agent:

- Skillset assignment
- Department
- User type
- Language
- Comment
- Supervisor
- Call presentation
- Threshold
- Contact type

When you copy an agent's properties, you must type in the new agent's name and login ID.

Procedure

1. From the **View/Edit** menu, select **Supervisors**.

Comments? infodev@avaya.com

2. In the left pane, click the **CC** server.
3. In the left pane, click the agent's supervisor.

   The Supervisor window appears in the right pane, listing the assigned agents in a table.
4. In the table, right-click the agent to copy, and then select **Copy Agent Properties**.

   The agent's properties appear in the New Agent Details window.
5. In the **User Details** section, type the new agent's name and login ID.
6. Optionally, type any comments you have about the agent. You can also change any of the copied properties. For example, you can assign the agent to new skillsets or partitions in the appropriate areas of this window.
7. After you configure the new agent, click **Submit** to save the agent under the specified supervisor.

   The agent's icon appears in the system tree.

Searching for agents

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

You can use the agent search feature in each of the four data views in Contact Center Management: Supervisor, Agent, Skillset, and Assignment.

In supervisor view, you can search for agents to assign to the currently selected supervisor.

In agent view, you can search for specific agents on a particular server. When you find the agents, you can view or change their properties, delete their profiles from the server, or copy their properties and create new agents.

In skillset view, you can search for agents to immediately assign to the currently selected skillset (ad hoc assignment).

In assignment view, you can search for new agents to add to saved agent to supervisor and agent to skillset assignments (and then you can schedule these assignments).

You can search by first name, last name, department, comment, login ID, logged in/logged out status or a combination of all of these criteria (up to a maximum of five levels). You cannot use the wildcard symbol (*) in your search.

You can search only among the agents included in the partition assigned to you, and in any supervisor/reporting agent combinations assigned to you.

Procedure

1. From the first list, select the criterion by which you want to search.

2. From the second list, select **Starts With**, **Contains**, or **Equals**.
3. In the third box, type the value you want to search for, or type a partial value.

   For example, to search for agents with the first name of either Frank, Francis, or Francisco, you can type Fran. You cannot use the wildcard symbol (*) in your search.
4. Optionally, from the fourth list, select **and** to search by two criteria. Select **or** to search by either one criterion or another.

   A second row of lists appears from which you can select the second criterion.

   You can continue to refine your search this way, entering a maximum of up to five criteria.
5. When you finish, click **Search**. Your search results appear in the agents table.
6. If you are not satisfied with the search results, or if you want to start a new search, from the fourth list in the first search row, select the blank value to clear all entered search criteria.

Searching for agents by skillset

Before you begin

Important:

You can search for a maximum of five skillsets. You can search only among those skillsets in the partitions assigned to you.

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

When you need to quickly locate all agents on a server either assigned to a skillset, in Standby for a skillset, or not assigned to a particular skillset, you can use the skillset search feature of Contact Center Management. You can use this feature in the Agent to Skillset Assignment window in Assignment view of Contact Center Management. This feature is particularly useful when you notice high contact volume for a skillset. You can locate all agents who are in Standby mode for the skillset so that you can assign them to handle the excess contacts.

Procedure

1. In the Agent to Skillset Assignment window, click **List Available Skillsets**.

   The heading expands to show a table listing all the skillsets not currently included in the assignment.
2. Beneath this table, click **Skillset Search**.
3. From the search boxes, choose the skillsets that you want to search for, up to a maximum of five.
4. After you choose your criteria, click **Search**.

   The agents that match your search criteria appear in a new table.

Comments? infodev@avaya.com

5. Note the Logged In agents, and then select the check box for each agent to add to the assignment.
6. Click **Update Table**.

   The agents appear in the Assignment Details table.
7. To search for agents by more than one skillset, from the last list, select **and**, select the new skillset and skillset status, and then click **Search**.

   Agents assigned to all of the specified skillsets appear in a new table.
8. To search for agents by one skillset out of a number of skillsets that you specify, from the last list, select **or**, select the new skillset and skillset status, and then click **Search**.

   Agents assigned to at least one of the specified skillsets appear in a new table.
9. To search for agents who are either in Standby mode for a skillset or not assigned to the skillset, from the first list, select the skillset, from the second list, select Standby, and from the last list, select **or**. From the first list in the second row, select the same skillset, from the second list, select **Not Assigned**, and then click **Search**.

   Agents who are either in Standby mode or not assigned to the skillset appear in a new table.

Chapter 35: Skillset assignments

A skillset is a group of abilities necessary to answer a specific type of contact. Skillsets are the basic building blocks of skill-based routing. Use skillsets to match a caller with the agent who can best meet the caller's needs.

In the Skillsets view, you can create new ad-hoc agent-to-skillset assignments and change the priority of skillsets already assigned to agents. Click View/Edit, Skillsets to change the system tree to the skillset view. Select a server in the system tree to log on to the server and work with the configured skillsets and agents.

When you click a skillset in the system tree, the Skillsets window appears, listing the agents who are currently assigned to the skillset and the priority for that skillset.

You can use this window to quickly assign new agents to the currently selected skillset (only those agents in your partition, and your reporting agents), or to change the priority of agents assigned to this skillset. You can use the search feature in this window to find new agents to assign to the skillset.

Creating a skillset assignment

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.
- Ensure that you understand Reset Assignments. For information, see Creating a reset assignment on page 179.

About this task

Create agent-to-skillset assignments to temporarily assign agents to different skillsets when agents are on breaks, are sick, are on vacation, or are on a course and to schedule future contact center configurations (for example, in response to planning through a work force management tool).

Procedure

1. In the Contact Center Management window, on the menu, choose **View/Edit** > **Assignments**.
2. In the left pane, expand the **CC** server.
3. Right-click the **Agent Skillset Assignments** folder, and then click **Add Assignment**.

4. In the New Agent to Skillset Assignment window, in the **Assignment Details** area, click the **List Available Agents** heading to search for agents to add to the assignment.

   You can search for agents by first name, last name, department, comment, or login ID. You can also search by the current agent login status (Logged In or Logged Out).

5. Enter your search details up to a maximum of five different criteria.
6. Click **Search**. The agents that match your criteria appear in a table. If you search by login status, you can search by this one criterion only.
7. To list all agents configured on the server (your partitioned agents and any agents in the reporting agent combinations assigned to you), click **List All**.
8. In the **Available Agents** table, note the agents logged on, and then select the check box for each agent to include in the assignment.
9. Click **Update Table**.

   The agents with their currently assigned skillsets appear in the Assignment Details table.

10. To remove an agent from the Assignment Details table, select the agent to remove and click **Remove Agent**.
11. To reset the Assignment Details table to the last saved configuration, click **Reset Assignment Details**.
12. To add new skillsets to the table, click the **List Available Skillsets** heading.

    Important:

    You can use this function to change only those skillsets that currently have priority values assigned, or all skillsets if that option is selected.

13. In the **Available Skillsets** table, select the check box for each skillset to add to the assignment.
14. Click **Update Table**.

    The skillsets appear in the Assignment Details table.

15. To add agents assigned to a particular skillset to the assignment, click **Skillset Search**. The heading expands to show a series of search boxes.
16. From the boxes, choose the skillsets to search for, up to a maximum of five levels.
17. Click **Search**. The agents that match your search criteria appear in a table.
18. Select the check box for each agent to add to the assignment, and then click **Update Table**.

    The agents appear in the Assignment Details table.

19. In the **Assignment Details** table, from the skillset lists, select the skillset priority level. You can choose from 1 to 48 and from Standby (1) to Standby (48). Press **Tab**.
20. Click the **Save/Schedule Assignments** heading.

    The heading expands to show a series of boxes.

21. In the **Skillset Search** box, type a unique name for the assignment.
22. To create a reset assignment, select the **Create Reset Assignment** check box.
23. Click **Save** to save the reset assignment before altering the original assignment.
24. Click **Save Assignment** to save the assignment in the **Assignments** folder.

Chapter 36: Assignments

In the Assignments view of Contact Center Management, you can create, view, and edit agent-to-skillset and agent-to-supervisor assignments. To run saved and scheduled assignments immediately, use the Run Now feature.

Assignment types

You can create two types of assignments in Contact Center Management:

- agent-to-supervisor assignments
- agent-to-skillset assignments

Agent-to-supervisor assignments

You can create agent-to-supervisor assignments to temporarily assign multiple agents to a different supervisor when supervisors are on breaks, are sick, are on vacation, or are taking a course.

Agent-to-skillset assignments

You can create agent-to-skillset assignments to temporarily assign agents to different skillsets when agents are on breaks, are sick, are on vacation, or are on a course.

Reset assignments

When you create a scheduled agent-to-supervisor assignment or an agent-to-skillset assignment in the Assignments view, you can create a reset assignment. A reset assignment is a record of the original data that existed at the time you created the assignment. For example, it contains a record of the original list of agents assigned to a supervisor before you modify an agent-to-supervisor assignment.

You can use a reset assignment to change and run the assignment as many times as you require, and then run the reset assignment to return conditions to their original state. This feature is particularly useful when you create an assignment to cover agent or supervisor breaks, and then want to return conditions to their normal state when the agent or supervisor returns to work.

You can modify a reset assignment just as you modify any other assignment.

Saving assignments

You cannot save multiple assignments simultaneously. If another user is saving an Agent-to-Supervisor or Agent-to-Skillset assignment, you cannot run your assignment save. If an assignment save is attempted while another assignment save is in progress, an error message is displayed on CCMA informing the user that another save is in progress and to try again soon.

Agent-to-supervisor assignment scenarios

The following scenarios provide some examples of when to create agent-to-supervisor assignments.

Example 1: Supervisor is sick

Pat Wilson, one of Best Air's supervisors, calls in sick for the day. The contact center manager creates and saves an agent-to-supervisor assignment and a reset assignment that lists all of the agents assigned to Pat. The manager schedules the reset assignment to run the following day. The manager then modifies the agent-to-supervisor assignment to assign half of Pat's agents to Chris Konings, and the other half to Cindy Wong. The manager applies the assignment immediately, which assigns all agents to their temporary supervisors for the day. When the reset assignment runs, the system reassigns all agents back to Pat.

Example 2: Supervisor is on vacation

Pat booked vacation from August 17-28. The contact center manager creates and saves an agent-to-supervisor assignment and reset assignment that lists all of the agents assigned to Pat. The manager schedules the reset assignment to run August 28 at 5:00 p.m. The manager then modifies the agent-to-supervisor assignment to reassign Pat's agents and schedules it to run August 17. When the reset assignment runs, the system reassigns the agents back to Pat.

Example 3: Supervisor is on regularly scheduled training

At Best Air, all supervisors must participate in regular upgrading. Every four weeks, the supervisor must spend half a day in training. Training sessions are staggered to ensure adequate supervision of the contact center. Pat's training occurs every third Thursday of the month. The contact center manager sets up an agent-to-supervisor assignment that automatically reassigns Pat's agents for that time.

Agent-to-skillset assignment scenarios

The following scenarios provide some examples of when you create agent-to-skillset assignments.

Example 1: Agents are sick

Mark Schultz, an agent in Best Air's Cargo Tracing skillset, is sick and absent from work today. This leaves the Cargo Tracing skillset understaffed, particularly for the period from 10:00 a.m. to 4:00 p.m., the skillset's busiest time. The contact center manager creates and saves an agent-to-skillset assignment and reset assignment that lists Rose Stefanopolis as one of the agents. The manager then modifies the agent-to-skillset assignment to assign Rose Stefanopolis (an agent who worked in this skillset before) to the Cargo Tracing skillset. The manager runs the agent-to-skillset assignment immediately, and Rose is automatically reassigned. When Mark returns to work the following day, the manager runs the reset assignment to reassign Rose to her normal skillset.

Example 2: Shifts

During the early morning and evening periods, few agents are available. As a result, many skillsets are understaffed. Others, such as the Cargo Tracing skillset, do not go into service until 9:00 A.M., and go out of service at 5:00 p.m. Best Air's contact center manager creates and saves an agent-to-skillset assignment and reset assignment that lists all agents that are assigned to the Cargo Tracing

skillset. The manager modifies the agent-to-skillset assignment to assign the agents to Bookings and schedules it to run during early morning and evening periods.

Canceling a scheduled assignment

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

You can cancel a scheduled agent to skillset assignment or a scheduled agent to supervisor assignment. When you cancel the schedule, the assignment is still saved for future reference.

Procedure

1. From the **View/Edit** menu, choose **Assignments**.
2. In the left pane, click the server containing the scheduled assignment to cancel.
3. Select the **Agent Skillset Assignments** folder or the **Agent Supervisor Assignments** folder.

   The list of assignments appears.
4. Click the scheduled assignment to cancel.
5. In the **Save/Schedule Assignments** section, from the **Schedule Type** list, select **Not Scheduled**.
6. Click **Schedule** to cancel the schedule.

   The assignment is cancelled and remains in the Assignments folder.

Creating a reset assignment

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

When you create a scheduled agent-to-supervisor assignment or an agent-to-skillset assignment in the Assignments view, you can create a reset assignment. A reset assignment is a record of the original data that existed at the time you created the assignment. For example, it contains a record of the original list of agents assigned to a supervisor before you modify an agent-to-supervisor assignment.

You can use a reset assignment to change and run the assignment as many times as you require, and then run the reset assignment to return conditions to their original state. This feature is particularly useful when you create an assignment to cover agent or supervisor breaks, and then want to return conditions to their normal state when the agent or supervisor returns to work.

Example

Supervisor Pat Jones takes a lunch break every day from 12:00 p.m. to 1:00 p.m. You want to reassign Pat's agents to Mike Smith every day from 12:00 p.m. to 1:00 p.m. To do so, follow these steps:

Important:

If you delete the assignment, the system deletes the corresponding reset assignment.

Procedure

1. Create an agent-to-supervisor assignment that lists all of the agents assigned to Pat.
2. Enter a name for the assignment, such as Lunchbox.
3. Select the **Create Reset Assignment** check box, and then click **Save Assignment**. When you create a reset assignment, the system saves it with the same name as the original assignment, but adds two underscores (__) at the end of the name. If you save the assignment as Lunchbox, the reset assignment name is Lunchbox__.
4. Modify the Lunchbox assignment to reassign Pat's agents to Mike and schedule it to run at 12 noon every day.
5. Schedule the Lunchbox__ reset assignment to run every day at 1:00 p.m., thereby reassigning all Pat's agents back to Pat when she returns from her lunch break.

Creating a supervisor assignment

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.
- Ensure that you understand Reset Assignments. See Creating a reset assignment on page 179.

About this task

You can schedule a supervisor assignment to reassign agents when supervisors are unavailable for some reason, for example break time or vacation.

Procedure

1. In the Contact Center Management window, on the menu, choose **View/Edit** > **Assignments**.
2. In the left pane, expand the server on which to assign agents to skillsets.
3. Right-click the **Agent Supervisor Assignments** folder, and then click **Add Assignment**.

4. In the New Agent to Supervisor Assignment window, in the **Assignment Details** area, click the **List Available Agents** heading to search for agents to add to the assignment.

   The heading expands to show the agent search boxes.

   You can search for agents by first name, last name, department, comment, or login ID. You can also search by the current agent login status (Logged In or Logged Out).
5. Enter your search details up to a maximum of five different criteria.
6. Click **Search**.

   The agents that match your criteria appear in a table.

   If you search by login status, you can search by this one criterion only.
7. To list all agents configured on the server (your partitioned agents and any agents in the reporting agent combinations assigned to you), click **List All**.
8. In the **Available Agents** table, note the agents logged on, and then select the check box for each agent to include in the assignment.
9. Click **Update Table**.

   The agents with their currently assigned supervisors appear in the Assignment Details table.
10. Click the **Save/Schedule Assignments** heading.
11. In the **Save Assignment as** box, type a unique name for the assignment.
12. Select the **Create Reset Assignment** check box to create a reset assignment.
13. Click **Save** to save the reset assignment before altering the original assignment.
14. Click **Save Assignment** to save the assignment in the Assignments folder.

Running an assignment immediately

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.
- Create at least one skillset or supervisor assignment.

About this task

When you create and save an agent to skillset or agent to supervisor assignment in Contact Center Management, you can run it immediately by using the Run Now option. You can use this option to run saved assignments or scheduled assignments immediately.

When you click Run Now to run a scheduled assignment immediately, the schedule still applies and the assignment is still run at the scheduled time.

If you make any changes to the assignment, you must first click Save Assignment before clicking Run Now. If you do not click Save Assignment, then the assignment runs without the changes you have made.

Procedure

1. In Contact Center Management, on the menu, choose **View/Edit** > **Assignments**.
2. In the left pane, click the server containing the assignment that you want to run.
3. Select the folder containing the saved or scheduled assignment that you want to run.
4. If you do not want to review the assignment details before running it, and you are sure of the assignment name, in the left pane, right-click the assignment name, and then click **Run Now**.

   The assignment runs immediately.

   OR

   Click the assignment.

   The assignment details appears in the right pane.
5. Review the assignment details in the assignment table and make any changes, if necessary.
6. If you make any changes to the saved or scheduled assignment, or if you schedule the assignment, click **Save Assignment**.
7. Click **Run Now**.

   The assignment runs immediately.

Assigning agents to skillsets

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

When you immediately assign one or more agents to a skillset without scheduling the assignment, you create an ad hoc assignment. Before you can assign an agent to a skillset, the agent's profile must exist on the server. The maximum number of skillsets you can assign to an agent is 150. For more information about adding new agents, see Adding an agent on page 160.

Note:

If you unassign all agents from a skillset, the skillset is taken out of service.

Procedure

1. In Contact Center Management, on the menu, choose **View/Edit** > **Skillsets**.
2. In the left pane, click the server on which to work with agents and skillsets.

3. Select a skillset.

   A list of agents assigned to the skillset appear in the right pane.
4. From the **Priority** list, select the new priority level.
5. To remove the skillset from the agent, select **Unassigned**.
6. To put the agent in Standby mode for this skillset, select **Standby**.
7. Click the **Assign Agents** heading to assign a new agent to this skillset.

   The search feature appears.
8. To list all agents configured on the selected server (only those agents in your partition and your reporting agents), click **List All**.
9. From the search lists, choose the criteria for your search.

   You can search for agents by first name, last name, department, comment, login ID, or a combination of any of these criteria. You can also search by current login status (either Logged In or Logged Out).
10. Click **Search** to return agents matching your criteria in a table.

    Only agents having the correct contact type for the skillset selected are returned.
11. From the **Priority** list, select the priority level for each agent to assign to this skillset.
12. To assign multiple agents to the same skillset priority at once, from the **Set all Skillsets by priority** list, select the priority level, and then click **Apply**.
13. Click **Submit** to assign the agents to the skillset.

    The agents appear in the Assigned Agents table.

Assigning agents to supervisors

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

To reassign agents when supervisors go on break or on vacation, you can immediately assign agents to new supervisors. You have three options when working with ad hoc (unscheduled) agent to supervisor assignments in Contact Center Management:

- You can use the Supervisor window to immediately assign multiple agents to a supervisor.
- You can use the drag and drop feature in Supervisor view to immediately reassign agents to supervisors.
- You can use the Agent Details window to immediately assign an agent to a supervisor, one agent at a time.

Procedure

1. On the menu, choose **View/Edit** > **Supervisors**.
2. In the left pane, click the server on which you want to work with supervisors and agents.
3. Click the supervisor to whom the agent is currently assigned.

   The supervisor icon expands to show all the assigned agents.
4. From the list of agents, left-click the agent who you want to reassign to another supervisor and, without releasing the mouse button, drag the agent icon over the new supervisor icon until the supervisor icon changes color.
5. Release the left mouse button to reassign the agent to the new supervisor.

Copying an assignment

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.
- Ensure that you understand Reset Assignments. See Creating a reset assignment on page 179.

About this task

To copy an existing assignment that you have created and saved in the Assignments folder, you must type a new assignment name and save the assignment.

If the assignment is scheduled, you must also click Schedule to activate the new schedule for the assignment.

Procedure

1. From the **View/Edit** menu, select **Assignments**.
2. In the left pane, click the server containing the assignment to copy.
3. Select the **Agent Skillset Assignments** folder.

   OR

   Select the **Agent Supervisor Assignments** folder.

   The list of assignments appears.
4. Click the assignment to copy.
5. In the **Save/Schedule Assignments** section, in the **Save Assignment As** box, type the new name of the assignment.

   Important:

   This name must be unique.

6. To create a reset assignment, select the **Create Reset Assignment** check box.
7. Click **Save Assignment** to save the assignment.

   A copy of the assignment appears in the Assignments folder. A message appears, notifying you that the assignment successfully saved.
8. If you scheduled the assignment, click **Schedule** to activate the scheduled assignment.

Deleting an assignment

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

Important:

When you delete an assignment, the system deletes the corresponding reset assignment. You can, however, delete a reset assignment and keep the original assignment. You cannot retrieve an assignment once it is deleted. Instead, you must create the assignment again.

About this task

You can delete agent to skillset assignments and agent to supervisor assignments.

Procedure

1. In the Contact Center Management window, on the menu, choose **View/Edit** > **Assignments**.
2. In the left pane, click the server containing the assignment to delete.
3. Select the **Agent Skillset Assignment** folder.

   OR

   Select the **Agent Supervisor Assignment** folder.

   The list of assignments appears.
4. In the left pane, right-click the assignment to delete, and then click **Delete Assignment**.
5. In the message box that appears asking you to confirm your choice, click **Yes**.

   The system deletes the assignment and the corresponding reset assignment.

Viewing a scheduled assignment

Before you begin

- Log on to CCMA.
- Open the Contact Center Management component.

About this task

Based on the access class that you have for assignments, and the servers upon which your access class is configured, in this window, you can view the schedules of agent-to-skillset and agent-to-supervisor assignments created and saved by all users across all servers in the network. You can also view details about the scheduled assignment, such as the name, type, the server on which it is run, and details about the schedule time.

You must have View Assignments access for both agent-to-skillset assignments and agent-to-supervisor assignments to see both of these types of assignments in this window. If you have access to only one of these types of assignments, then you can only see the schedules for this type of assignment. Likewise, you can see only those assignments scheduled on the servers on which your access class is configured.

With Schedule Assignments access, however, you can also use this window to delete the schedules of the assignments listed, leaving the assignments intact on the server. If you have the View Assignments access or less, however, you cannot delete schedules, you can only view the assignments.

Procedure

1. On the menu, choose **View/Edit** > **Assignments**.
2. In the left pane, click the **Scheduled Events** folder.

   The Scheduled Events window opens, listing all scheduled assignments to which you have access on the servers included in your access class.

Comments? infodev@avaya.com

Chapter 37: Configuration Tool procedures

Use the Configuration Tool spreadsheet to upload and download Avaya Contact Center Select configuration data.

You can use the Configuration Tool spreadsheets to save time when you configure a new Contact Center. Instead of entering the data for each resource individually, you can simultaneously upload all configuration data that you enter in the spreadsheet. When you upload the data from the spreadsheet, you can choose to upload all configuration items at once or only a portion.

Upload data if you want to transfer data from the spreadsheet to Avaya Contact Center Select. Download data if you want to transfer data from Avaya Contact Center Select to the spreadsheet.

You can normally only use the Configuration Tool to add or download data; however the Configuration Tool does allow you to edit certain configuration details. For example, if you want to bulk change your agents account mappings you can use the Configuration Tool spreadsheet. The Configuration Tool spreadsheet does not allow you to edit all fields on every tab. If you want to modify or delete data that cannot be edited using the Configuration Tool spreadsheet, you must use the Configuration component in Contact Center Manager Administration.

Note:

The procedures in this chapter use Microsoft Excel 2010. Procedures can differ depending on the version of Microsoft Excel you use.

Prerequisites to Configuration Tool procedures

Procedure

Log on to Contact Center Manager Administration as an administrator.

Downloading a Configuration Tool spreadsheet

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.

Important:

You cannot delete data within the Configuration Tool. If you need to delete data, you must use the Configuration component in Contact Center Manager Administration.

About this task

Download a spreadsheet to add configuration data for all resources at once. Before you upload and download contact center configuration data, you must download the formatted Contact Center Manager Configuration Tool spreadsheet from the Configuration window.

Procedure

1. In the Configuration component of Contact Center Manager Administration, on the menu, choose **Download** > **Configuration Tool**.
2. On the dialog box, click **Run**.
3. To extract the spreadsheet and its associated files to the default directory, in the **WinZip Self-Extractor** dialog box, click **Unzip**.

   A message appears, confirming that you successfully unzipped the spreadsheet and its associated files.
4. To navigate to the directory of your choice, in the **WinZip Self-Extractor** dialog box, click **Browse**.

   Important:

   The validation template file and the Online Help file must be in the same folder as the spreadsheet. The naming convention for these files is ConfigurationTool.chm for Help files, and ACCS_Validation.xml for validation files.
5. Click **OK**.

Entering data in a Configuration Tool spreadsheet

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Download the spreadsheets.

About this task

Enter data in the Configuration Tool spreadsheet to transfer Contact Center configuration data to Avaya Contact Center Select, instead of using the Configuration component in Contact Center Manager Administration. The spreadsheet includes a separate worksheet for each configuration item.

Procedure

1. Open the Configuration Tool spreadsheet.

2. If a message box appears asking if you want to enable all macros, click **Enable Macros**.
3. Click the tab of the configuration item to configure (for example, Users).
4. Enter the configuration data.

   If you need help entering values, place your cursor in the column heading cell. A comment appears with information on the types of values allowed, and whether data is mandatory or optional. For more detailed information, open the Configuration Tool Help. To open the Configuration Tool Help, select the **Add-Ins** tab of the Configuration Tool spreadsheet and click **Configuration Tool Help**.
5. Save your entries.

Validating data in a Configuration Tool spreadsheet

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Download the spreadsheets.
- Enter data in the spreadsheets.

About this task

To reduce upload time, the Contact Center Manager Configuration Tool spreadsheet toolbar includes a Validation feature. You can use this feature to identify and correct any invalid entries you made in the spreadsheet before uploading the data to Avaya Contact Center Select.

Procedure

1. Open the Configuration Tool spreadsheet containing the entries you made.
2. If a message box appears asking you if you want to enable all macros, click **Enable Macros**.
3. Verify that the validation template file, **ACCS_validation.xml**, is in the same folder as the spreadsheet. If this file is not in the same folder, navigate to it and place a copy of it in the spreadsheet folder.
4. On the Configuration Tool spreadsheet toolbar, click the **Add-Ins** tab.
5. Click **Data Validation**.
6. in the **Data Validation - Configuration Tool** dialog box, in the Configuration Data area, select the data to validate. You can validate all of the data you entered or a portion of it.
7. Click **OK**.

   The application reads all of the entered data, highlights any incorrectly formatted values, highlights mandatory cells that are missing any values, and displays an error message in any row containing an error.

Correcting invalid entries in a Configuration Tool spreadsheet

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Validate the spreadsheet entries.

About this task

When the system locates invalid data entries in the Configuration Tool spreadsheet during the data validation or upload process, it displays error messages in the Status Message column in the row containing the invalid data. After you locate and correct the errors, validate the data again.

Procedure

1. On the Configuration Tool spreadsheet, click the tab containing the invalid configuration data.
2. In the **Status Message** column, locate the error message and the cells in that row that contain the errors.

   Cells containing errors are highlighted in yellow.
3. Enter the correct data.
4. Save the spreadsheet.

Uploading data from a Configuration Tool spreadsheet

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Download, complete, and validate the spreadsheets.

About this task

After you enter and validate all of your Contact Center configuration data in the Configuration Tool spreadsheet, you can use the Upload feature on the Configuration spreadsheet toolbar to transfer the data to Avaya Contact Center Select.

Procedure

1. Open the Configuration Tool spreadsheet containing the entries you made.
2. If a message box appears asking if you want to enable all macros, click **Enable Macros**.
3. Verify that the validation template file, **ACCS_validation.xml**, is located in the same folder as the spreadsheet.

If this file is not in the same folder, navigate to it and place a copy of it in the spreadsheet folder.

4. On the spreadsheet toolbar, click the **Add-Ins** tab.
5. Click **Data Upload**.
6. Under **CCMA Server Login**, in the **Server Name or IP** box, type the name or IP address of the Avaya Contact Center Select server.
7. Enter your Administrator user ID and password for Contact Center Manager Administration.
8. Click **Login**.
9. In the **Data Upload - Configuration Tool** dialog box, from the **Available Servers** list, select the Avaya Contact Center Select server to which to upload the data.
10. In the **Configuration Data** area, select the type of data to upload.
11. Click **OK**.

    The system displays the **Upload Status - Configuration Tool** dialog box.

    As your data uploads, the **Current Status** box lists the records that are read. After the upload process is complete, the **Summary Status** box lists the data that was successfully uploaded, as well as any errors that occurred. If there are any errors, they also appear in the Status Message column of the spreadsheet.

Recording the upload results

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Upload data from a spreadsheet.

About this task

To record the upload results for future reference, you can copy them to a text file and save the file on your computer.

Procedure

1. In the **Upload Status - Configuration Tool** dialog box, place your cursor in the **Summary Status** box.
2. Select all of the text (**Ctrl+A**).
3. Copy the selected text (**Ctrl+C**).
4. Open a text editor, such as **Notepad**, and paste the text you copied.
5. Save the file.

Downloading data to a Configuration Tool spreadsheet

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Configuration component.
- Download the spreadsheets.

About this task

You can transfer current configuration data from Avaya Contact Center Select to the Configuration Tool spreadsheet by using the Download feature on the Configuration Tool spreadsheet toolbar.

Procedure

1. Open the Configuration Tool spreadsheet.
2. If a message box appears that asks if you want to enable all macros, click **Enable Macros**.
3. On the Configuration Tool spreadsheet toolbar, click the **Add-Ins** tab.
4. Click **Data Download**.
5. If you have not logged on to Contact Center Manager Administration from the Configuration Tool spreadsheet before, in the **CCMA Server Login** dialog box, in the **Server Name or IP** box, type the name or IP address of the Avaya Contact Center Select server.
6. Enter your Administrator user ID and password for Contact Center Manager Administration.
7. Click **Login**.
8. In the **Data Download - Configuration Tool** dialog box, from the **Available Servers** list, select the Avaya Contact Center Select server from which to download the data.
9. In the **Configuration Data** area, select the type of data to download.

   Important:

   If a user ID and password were not provided when the server was added to the system, you receive a prompt to type this information in a logon dialog box.
10. Click **OK**.
11. In the **Save As** dialog box, in the **File Name** box, type a name for the spreadsheet.

    Important:

    If you do not enter a different name for the spreadsheet, you overwrite the existing spreadsheet. If you do not want to change the spreadsheet name but do want to maintain an archive of spreadsheets, save the spreadsheet in a different directory.
12. Navigate to the directory where the validation template file, ACCS_Validation.xml, and the Online Help file, ConfigurationTool.chm, are located.

Comments? infodev@avaya.com

Important:

If you save the new spreadsheet in a different folder, you must place a copy of the ACCS_Validation.xml file and the ConfigurationTool.chm file in the same folder.

13. Click **Save**.

    The system saves the current spreadsheet and opens the new one. The **Download Status - Configuration Tool** dialog box appears. As your data is downloaded, the Current Status box lists the records that are being read. After the download process is complete, the **Summary Status** box lists the data that was successfully downloaded, as well as any errors that occurred.

Chapter 38: Prompt Management

CCMA Prompt Management allows the administrator to add and update prompts on the Avaya Media Server (Avaya MS).

In the Prompt Management component, the system displays the CC server and the associated Avaya MS server. When you select the CC server, CCMA retrieves content groups contained within the contact center namespace on the associated Avaya MS server. You cannot use CCMA to add a new namespace to the media server. The content groups contain the media prompts. CCMA supports single-level content groups at the namespace level. You cannot create nested content groups in CCMA.

By default, Avaya Contact Center Select creates a content group that matches the Avaya MS locale name. The default content group includes a number of sample prompts and music. You can use these sample prompts in your Orchestration Designer flow applications to treat Contact Center calls. Contact Center also provides sample Orchestration Designer flow applications that use the sample prompts and music provided.

Contact Center provides a number of sample prompts and sample music that you can use in your Orchestration Designer flow applications to treat Contact Center calls. Contact Center also provides sample Orchestration Designer flow applications that use the sample prompts and music provided. All of the sample prompts have an associating variable that exists in Orchestration Designer. This allows the administrator to modify the prompts within the flow applications without opening Orchestration Designer.

If you want to change a sample prompt to suit the requirements of your Contact Center, you can overwrite the existing sample prompt while continuing to use the default sample Orchestration Designer flow applications.

Prompt Management in a geographic redundancy environment

If a failover occurs to the Remote Geographic Node (RGN) site, you must update the Master Content Store setting to point to your local Master Content Store node at the RGN site. When you update this setting, you can use Contact Center Manager Administration for prompt management at the RGN site.

After a failover, the user-defined partitions applied to prompts do not apply on the RGN server. Users with access to Prompt Management can access all prompts on an RGN server. If necessary, an administrator must reconfigure user-defined prompt partitions on the RGN server. If an administrator makes prompt changes to new or existing user-defined partitions on the RGN server, these prompt changes are not replicated on the servers at the campus site and do not apply when campus Business Continuity is reinstated.

Adding a Content Group

Before you begin

- Log on to CCMA.
- Open the Prompt Management component.

About this task

You can create content groups to store media prompts. By default, a content group exists that matches the Avaya MS locale name. You can use this content group to add new prompts or overwrite existing prompts.

Procedure

1. From the left-hand pane, right-click the CC server and select the **Add Content Group** option.
2. Type the name of the content group.
3. Click the **Add Content Group** button.
4. Click **Save**.

   The system creates a new Content Group folder under the CC server.

Adding or updating a Media Prompt

Before you begin

- Upload the music .WAV file, encoded as Linear 16-bit PCM, 8KHz Mono with a sampling rate of 128kbits/sec, to a location accessible from the Contact Center server.
- Log on to CCMA.
- Open the Prompt Management component.

About this task

Add new media prompts, or overwrite existing media prompts with your own recordings. To update and overwrite an existing media prompt, the Media Name of the new file must match the Media Name of the file you are overwriting.

Procedure

1. From the left-hand pane, click the CC server.

   The system displays the content groups available.
2. Click the content group in which you want to add media prompts.

   The system displays a new page that lists all the prompts stored under that content group.
3. To add or update a media prompt, click **Add Media**.
4. Under **Add Media**, click **Select** to navigate to the location of the new media file.

5. To provide a new name for the media prompt file, type the new name in the **Media Name** field.

   Important:

   If you want to update and overwrite an existing media prompt, this name must match the Media Name of the file you are overwriting.

6. To assign the prompt to any or all user-defined partitions, under **User Defined Partitions**, select the user-defined partitions to assign the media prompt to.
7. Click **Save**.

   The system uploads prompt to the media server and adds the new prompt to the grid.

Variable definitions

Name	Description
Add Media	Click **Add Media** to upload a new media prompt to the media server, or to overwrite an existing prompt.
Save	Click **Save** to save your current actions.
Download Media	Click **Download Media** to download the selected media prompt.
Delete Media	Click **Delete Media** to delete the selected media prompt.
Delete Content Group	Click **Delete Content Group** to delete the selected content group.
Rename Content Group	Click **Rename Content Group** to rename the selected content group.
Cancel	Click **Cancel** to cancel your current actions.

Chapter 39: Real-time reporting

The Contact Center Manager Administration (CCMA) Real-Time Reporting displays provide up-to-date statistics for your contact center and resources. With access to statistics that update in real-time, such as the number of contacts waiting to be answered, the number of agents assigned to each skillset, and the number of abandoned calls, you can view changes in contact activity as they occur.

Contact Center can present real-time data in the most appropriate format - graphical, tabular, or a combination of both. This allows supervisors to react immediately to changing circumstances, adjust skillsets and staffing levels, or reroute calls to other resources. Real-Time Reporting displays make it easy to monitor peak periods and adjust staffing levels as appropriate to maintain the highest levels of customer service.

Launching the Contact Center Status real-time display

About this task

Access Avaya Contact Center Select Real-Time Reporting and launch the Contact Center Status real-time display. Use the displays to monitor the performance of the contact center in near real-time.

Avaya Contact Center Select offers a number of sample public real-time displays. Create a private copy of these displays and experiment with them to create displays that meet the day-to-day requirements of your solution.

For example, the CC Status public graphical display has the following panels:

Panel	Type	Description
CC_Standard_Agent_Display (CC)	Tabular	This tabular panel displays the agent status and time in current state. Use this panel to monitor individual agent activity.
CC_Contacts_Wait	Chart	This pie chart displays the number of contact waiting for each skillset.
CC_Standard_Application_Display	Tabular	This tabular panel displays the maximum wait times, and the number of contacts offered, waiting, answered, or abandoned.
CC_Sample_Skills	Chart	This panel displays the service level for each skillset.

This combined display provides a real-time status report about important Avaya Contact Center Select performance parameters.

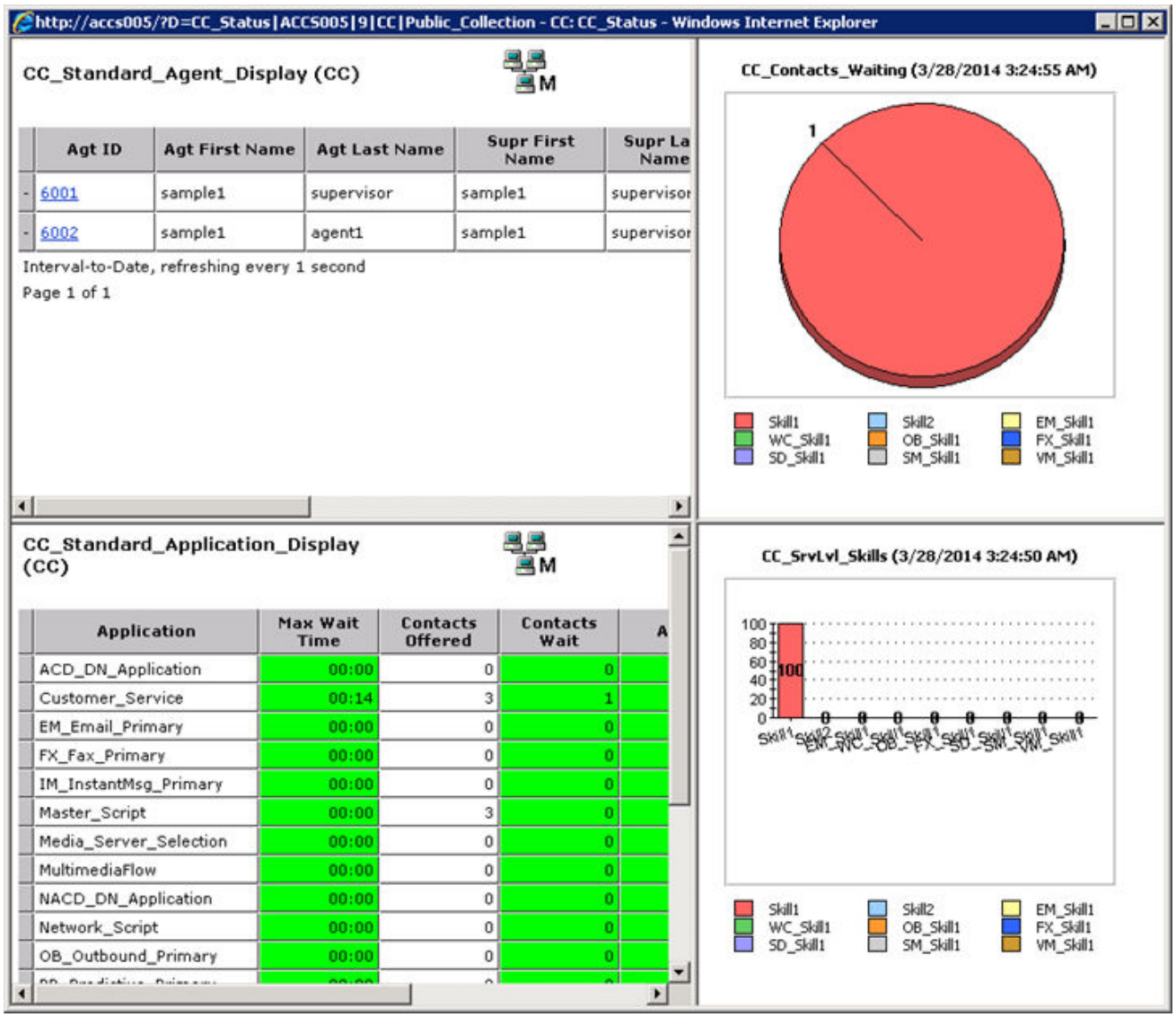
Procedure

1. Log on to Contact Center Manager Administration.
2. On the Contact Center Manager Administration **Launchpad**, click **Real-Time Reporting**.
3. In the left pane, select the **Public Graphical Displays** folder.
4. In the left pane, from the list of displays, select **CC_Status**.
5. On the **Public Collection properties** tab, select the default display options for CC Status. These standard displays combine to form an effective Real-Time Reporting graphical display.
6. Click **Launch**.

   The Contact Center Status real-time display appears.
7. Use the display to monitor contact center performance in near real-time.
8. Experiment with Real-Time Reporting to find, copy, or create a set of displays that meets your solution requirements.

Comments? infodev@avaya.com

Example of the Contact Center Status real-time display



Creating a private real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Create a private real-time display to customize real-time displays.

Procedure

1. In the left pane, select the **Public Tabular Displays** folder under the **CC** server.
2. From the expanded **Public Tabular Displays** folder, select the display to copy.
3. In the Public Display window, type the name of your new private display. You can use only alphanumeric characters in the display name; do not use special characters.

   When you copy a display, the system gives the new display a default name in the format `[server name]_[display name]`. Since each private display must have a unique name, you must type a new name, if you save a public display with the same default name. If you do not type a new name, the system overwrites the existing display.
4. To save the display in the **Private Tabular Displays** folder, click **Make Private Copy**.
5. On the Properties page, you can change the colors, font size, and the refresh rate.

Making a public copy of a private real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

After you customize a real-time display and save it in your **Private Tabular Displays** folder, you can share the display with other users by making a public copy. You can copy the display to the **Public Tabular Displays** folder on the currently selected server or across all servers on the network to which you have access.

Important:

Contact Center saves filters only for private real-time display. Contact Center removes all filters from public copies of your private real-time displays. Supervisors and agents using public copies can apply filters after they launch the displays.

Procedure

1. In the left pane, select the **Private Tabular Displays** folder under the **CC** server.
2. From the expanded **Private Tabular Displays** folder, select the display to copy.
3. At the bottom of the Properties page, type the name of the display as you want it to appear in the **Public Tabular Displays** folder.

   Note:

   You can use only alphanumeric characters in the display name; do not use special characters. You cannot type the same name used by one of the Standard Public displays as you cannot overwrite these displays. If you type the same name as an existing copied display, then you overwrite the existing display.
4. Select **This Server Only**.

5. Click **Make Public Copy** to save the private display in the **Public Tabular Displays** folder.
6. In the Public Display window, you can view the public display or make a new private copy of it.

Applying custom formulas to real-time displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

After you create custom formulas in the Formula Editor, apply them to your private real-time displays in the Real-Time Reporting component.

You can customize only the columns in private displays. If you choose a public display, you must first copy and save it in your Private Displays folder before you can customize the columns.

Procedure

1. Select the **Private Tabular Displays** folder under the **CC** server.
2. Click the display to customize.
3. Click the **Columns** tab.
4. From the **Available Fields** list, select the formula to add to the real-time display.
5. Click **Add Field**.
6. Click **Submit** to save your changes.
7. Click **Launch Display** to view your changes.

Printing a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

If you require a hard copy, you can print a real-time display.

Procedure

1. In the left pane, navigate to the real-time display that you want to print.
2. Click **Launch Display**.
3. On the real-time display window, click **Print**.

4. In the Print dialog box, from the **Printer Name** list, select the desired printer.
5. Click **Print**.

Deleting a private display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- At least one private display must exist.

About this task

Delete private tabular displays and private graphical displays.

Note:

Once you delete a display, you cannot recover it.

Procedure

1. In the left pane, select the **CC** server.
2. Click the **Private Tabular Displays** folder to delete a private tabular display.

   OR

   Click the **Private Graphical Displays** folder to delete a private graphical display.
3. In the selected folder, click the private display to delete.
4. In the right pane, click **Remove Private Display** to delete a private tabular display.

   OR

   Click **Remove Display** to delete a private graphical display.
5. In the Confirmation dialog box, click **OK**.

   The system permanently deletes the display.

Logging out an agent from a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Customize a private real-time display to include the Logout column, or select a previously customized display.

About this task

Use this procedure to log out an agent from a real-time display.

Procedure

1. In the left pane, select an Agent Display that has the Logout column and shows the agent you want to log out.
2. In the right pane, click **Launch Display**.

   CCMA opens the real-time display window.
3. Scroll to the agent that you want to log out.
4. Click the **Force Log out** button ( ).
5. On the **Logout Confirmation** dialog, click **Yes**.

   Contact Center logs out the agent, and displays a message on the agent's Agent Desktop interface informing them that a supervisor has logged them out.

Changing an agent's Ready status from a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Customize a private real-time display to include the Change State column, or select a previously customized display. For more information, see Real-time report customization on page 56.

About this task

Use this procedure to change an agent's status from a real-time display.

Procedure

1. In the left pane, select an Agent Display that has the Change State column and shows the agent whose status you want to change.
2. In the right pane, click **Launch Display**.

   CCMA opens the real-time display window.
3. Scroll to the agent for whom you want to change the ready status.
4. Click the **Change State** button (/).

   CCMA displays the **Change Agent State Confirmation** dialog.
5. If you changed the agent's status from Ready to Not Ready, on the **Change Agent State** dialog, enter a Not Ready Reason code, and click **Yes**.

   Contact Center displays a message on the agent's Agent Desktop interface informing them of the state change.
6. If you changed the agent's status from Not Ready to Ready, on the **Change Agent State** dialog click **Yes**.

Contact Center displays a message on the agent's Agent Desktop interface informing them of the state change.

Viewing the non-staffed skillsets

About this task

Use the Non-Staffed Skillsets window to view a list of all the skillsets within your partition, without logged-on agents. Unlike the real-time display from which you launch this window, the list of non-staffed skillsets does not refresh automatically. Instead, you must manually refresh the list to obtain the most recent information.

Procedure

1. Log on to the **Real-Time Reporting** component.
2. In the left pane, click the relevant server and then click the folder that contains the skillset display.
3. Click the skillset display that you want to launch.
4. In the right pane click **Launch Display**

   The display launches.
5. In the display, click **Non-Staffed Skillsets**.

   The Non-Staffed Skillsets window appears, listing all of the skillsets within your partition, without logged-on agents.
6. Click **Refresh**.

Comments? infodev@avaya.com

Chapter 40: Filter management

In Avaya Contact Center Select, you can create skillset, application, and agent filters for real-time reporting. You can configure filters with a combination of the three data types.

Use filters to specify the skillset, application, and agent data that you want to see in the realtime displays. In the Filters window, configure the filters from all elements in the partition assigned to you. After configuring filters, you can assign the filters to your private real-time displays.

The real-time displays show subtotals of data for each filter, which are further divided into subtotals for each site that belongs to the filter.

Note:

Some statistical fields cannot be accumulated.

Creating a filter in Real-time reporting

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Ensure that you have access to filters.

About this task

Create filters to specify the skillsets, applications, and agents that you want to see in the real-time display grids, and the agents that you want to see in the agent map graphical displays.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. Right-click on the **Filters** folder and select **Add Filter**.
3. In the **New Filter Name** box, type the name of the filter. You can use only alphanumeric characters. Do not use special characters.
4. Click **Submit** to save the filter.

Adding skillset elements to a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

Add skillset elements to a filter to view the required statistics.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter to edit.
3. Select the server on which to add the elements.
4. Select the **Skillsets** tab.
5. Click the **Assign Skillsets** heading.
6. From the list, select **contains**, **is equal to**, or **starts with**.
7. In the box, type the skillset name.
8. Click **Search**.
9. In the list of available skillsets, select the check box for each skillset to add to the filter.

   OR

   To select all available skillsets, select the **Select All** check box.
10. Click **Submit** to save your changes.

Adding application elements to a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

When you select an application element to filter in billboards and charts, your new application element appears in the **Filter Selection** list under **Available**.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter to edit.
3. Select the server on which to add the elements.

4. Select the **Application** tab.
5. In the list of available applications, select the check box for each application to add to the filter.

   OR

   To choose all available applications, select the **Select All** check box.
6. Click **Submit** to save your changes.

Adding agent elements to a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

Include statistics for specific agents by adding agent elements.

When you select an application element to filter in billboards and charts, the new application element appears in the **Filter Selection** list under **Available**.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter to edit.
3. Select the server on which to add the elements.
4. Select the **Agents** tab.
5. Click the **Assign Agents** heading.
6. From the first list, select **Last Name**, **First Name**, **Department**, **Comment**, or **Login ID**.
7. From the second list, select **contains**, **is equal to**, or **starts with**.
8. In the box, type a value to search.

   You can search for up to five levels by selecting **And** or **Or** from the last list.
9. Click **Search**.

   Agents that match your criteria appear in a table.
10. In the list of available agents, select the check box for each agent to add to the filter.

    OR

    To choose all available agents, select the **Select All** check box.
11. Click **Submit** to save your changes.

Removing elements from a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

To modify the report display, remove elements from a filter.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter from which to remove applications, skillsets, or agents.
3. On the **Skillset**, **Application**, and **Agent** tabs, clear the check boxes for each skillset, application, or agent to remove from the filter.
4. Click **Submit** to save your changes.

Deleting a filter

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

If you need to rename a filter, you must delete the filter and create a new one with a new name.

Procedure

1. From the **Filters** menu, select **Manage Filters**.
2. In the left pane, select the filter to delete.
3. In the right pane, click **Delete Filter**.
4. On the message box that appears asking you to confirm your choice, click **Yes**.

Applying filters to real-time tabular displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

Use the Filters page to apply filters to customize your real-time tabular displays. You can apply a filter, a supervisor-reporting agent combination, or both.

Procedure

1. In the left pane, under the server containing the real-time display to which to apply filters, select the **Private Tabular Displays** folder.
2. Click the private display to customize.
3. Click the **Filters** tab.
4. From the list of available filters, select the check box for each filter to assign to the real-time display.

   OR

   To assign all of the available filters (and supervisor-reporting agent combinations listed, if you customize the **Standard Agent Display**), click **Select All**.
5. Click **Submit** to save your changes.
6. Click **Launch Display** to start the display and view your changes

Applying filters to graphical displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

Filters on real-time displays provide a mechanism for a supervisor to group together a number of agents, applications, or skillsets. Real-time reporting is capable of providing summary statistics for filters when they are added to a display. Filters are available for selection as an alternative to skillsets or applications on a number of the real-time reporting billboards and charts. The following displays support filters:

- Application Billboards
- Skillset Billboards
- Application Chart (statistics per application)
- Skillset Chart (statistics per skillset)
- Time Line Chart (statistics per skillset)
- Time Line Chart (statistics per application)
- Agent Map

Note:

Filters are not supported on dashboard displays.

Procedure

1. In the left pane, under the server containing the real-time graphical display to which you require to apply filters, select the **Private Graphical Displays** folder.
2. Click the private display to customize.
3. From the drop-down list of **Applications** or **Skillsets**, select the filter to assign to the real-time display.

   The filters are grouped together at the end of the **Applications** list or the **Skillsets** list.
4. Click **Submit** to save your changes.
5. Click **Launch** to start the display and view your changes.

Applying supervisor-reporting agent combinations to real-time displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

You can apply supervisor-reporting agent combinations to the **Standard Agent Display**.

Procedure

1. In the left pane, select the server containing the Standard Agent real-time display to which you require to apply supervisor-reporting agent combinations.
2. Select the **Private Tabular Displays** folder.
3. Click the private agent display to customize.
4. Click the **Filters** tab.
5. From the list of available supervisor-reporting agent combinations, select the check box for each supervisor to assign to the real-time display.

   OR

   To assign all the available supervisor-reporting agent combinations and all filters, click **Select All**.
6. Click **Submit** to save your changes.
7. Click **Launch Display** to start the display and view your changes.

Removing filters from a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one filter.

About this task

You can remove a filter that you do not require, to modify a real-time display.

Procedure

1. In the left pane, select the server that contains the real-time display from which to remove filters.
2. Select the **Private Tabular Displays** folder.
3. Click the display to customize.
4. Click the **Filters** tab.
5. From the list of assigned filters, clear the check box for each filter to remove from the real-time display.

   OR

   To remove all of the filters from the real-time display, click **Clear All**.
6. Click **Submit** to save your changes.

Chapter 41: Exported displays

The procedures in this section describe how to work with exported real-time displays.

Exporting real-time displays

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can export real-time displays to open the file in a new Internet Explorer window. Exporting real-time displays creates a snapshot file in HTML format.

Important:

You must carefully manage exported displays. Exported displays consume disk space on the Contact Center Manager Administration server.

Procedure

1. In the left pane, double-click the real-time display to export.
2. On the real-time display, click **Export**.
3. To open the file in a new Internet Explorer window, click **View**.

Viewing an exported real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You must view an exported real-time display, to print the display.

Procedure

1. From the **Displays** menu, select **Manage Exported Displays**.
2. In the right pane, from the list of HTML files, click the name of the file to view.

The snapshot of the real-time display grid appears in a new Internet Explorer window.

3. To print the exported grid, in **Internet Explorer**, from the **File** menu, select **Print**.
4. To view the colored rows of the real-time display, in the Print dialog box, select a color printer.
5. Click **Print**.

Changing the file name prefix of exported real-time display grids

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can choose the prefix to appear in the file name when you export the real-time display grids to the server as HTML files. An example of the prefix for the Consolidated Skillset Display is ConsolidatedSkillSet.

The exported file name includes your user name, the prefix that you select, the date and time you save the file. For example, if your user name is John, your prefix is ConsolidatedSkillSet, and you chose to export the Consolidated Skillset Display as an HTML file on April 10, 2000 at 2:45:28 p.m., the system saves it on the server as `John_ConsolidatedSkillSet_20000410_144528.htm`.

Procedure

1. In the left pane, under the **CC** server, click the **Private Tabular Displays** folder.
2. Click the display name.
3. On the Properties page, in the **Grid export prefix** box, type the prefix to appear in the HTML file name.

   Note:

   Do not include spaces in the prefix.
4. Click **Submit** to save your changes.

Chapter 42: Graphical displays

In the Graphical Display window, you can configure one of seven types of graphical displays:

- Billboard displays
- Chart displays
- Time Line displays
- Agent maps
- Collections
- Billboard collections
- Dashboard displays

Adding a graphical display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Create a graphical display.

Procedure

1. From the **Displays** menu, select **Add Graphical Display**.
2. In the **Name** box, type the name of the new graphical display.

   The system displays this name on the system tree.
3. From the **Server** list, select the **CC** server.
4. In the Element Type area, select the type of element corresponding to the type of graphical display that you want to create, from the following list:
   - **Agent**: Create an agent map.
   - **Application**: Create an application billboard, chart, or time line.
   - **IVR**: Create an IVR billboard, chart, or time line.
   - **Skillset**: Create a skillset billboard, chart, or time line.

- **All**: Create a dashboard, a private or public collection, a private billboard or public billboard collection.

5. In the Presentation area, select the type of graphical display to create.

   The type of chart you can create varies according to the selection you made in the Element type area.

6. Click **Edit Properties** to configure the graphical display.

   The system displays the corresponding properties window.

7. Click **Submit** to save the graphical display.

Opening a graphical display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one graphical display.

About this task

View a graphical display.

Procedure

1. In the left pane, click the folder containing the graphical display to view.
2. Click the graphical display to view.
3. In the right pane, review the current settings for the graphical display.
4. If you change the settings, click **Submit** to save your changes.
5. Click **Launch**.

   While you view an agent map or billboard graphical display, the display can change color. This change alerts you when the statistic values exceed the configured threshold values. For agent map displays, text flashes when a threshold value is reached, while you view the display in the box view (if you configure the display with this feature).

Deleting a graphical display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

When you no longer require a graphical display, you can delete the display.

Procedure

1. In the left pane, click the **Public Graphical Displays** or the **Private Graphical Displays** folder.

   Note:

   When you delete a graphical display, you cannot restore it. Instead, you must create a new graphical display.

2. In the list of displays, click the graphical display to delete.
3. In the right pane, click **Remove Display**.
4. In the message box that appears asking you to confirm your choice, click **OK**.

Creating a Real-time Dashboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can create a Real-time Dashboard display to provide you with multiple views of up-to-date statistics for your contact center and its resources. A real-time dashboard display is click-once client application that displays performance related real-time statistics. Contact Center uses Click Once Deployment technology to download and install the application from the Contact Center server.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new dashboard.

   This is the name that appears in the system tree. You can use only alphanumeric characters in the collection name, you cannot use special characters.

3. From the **Servers** list, select the **CC** server.
4. In the **Element Type** area, select **All**.
5. In the **Presentation** area, select **Dashboard**.
6. Click **Edit Properties** to configure the new collection.
7. The Collection Properties window appears.
8. In the **Dashboard title** box, accept the default name, or delete the default name and type a custom name to appear as the title of the window when the dashboard display is launched.
9. The **Install** button is enabled if the prerequisite software required to run the dashboard is not found on your computer. Click the **Install** button download and install the relevant .Net Framework.

10. Click **Submit** to save your changes.

    The new dashboard appears on the system tree under Graphical Displays.

Adding charts to the Real-time Dashboard

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a Real-time Dashboard display.

About this task

You can add charts to the Real-time Dashboard to view them.

Procedure

1. In the left pane, click the **Private Graphical Displays** folder.
2. Click the Real-time Dashboard display.
3. Click **Launch**.
4. From the **Displays** menu, select a display chart.
5. From the display chart menu, select the data to display on the chart.

   The data appears on the chart in the Real-time Dashboard display.

Changing chart properties in the Real-time Dashboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a Real-time Dashboard display.
- Add a display chart to the Real-time Dashboard.

About this task

You can change the items that appear on the charts in the Real-time Dashboard to meet your requirements.

Procedure

1. Click the **Properties** tab of the chart to change.
2. Select the skillsets, applications, and statistics to display on the chart.
3. Click the **Display** tab to display the updated chart.

Note:

If you choose **None** from the **Color Palette** drop-down list, in the **Display** > **Options** menu, the chart is displayed in its default color.

Removing display charts from the Real-time Dashboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a Real-time Dashboard display.
- Add a display chart to the Real-time Dashboard.

About this task

You can remove display charts from the Real-time Dashboard display.

Procedure

1. In the left pane, click the **Private Graphical Displays** folder.
2. Select the Real-time Dashboard display.
3. Click **Launch**.
4. Click the **X** button beside the display to remove the display.
5. In the message box that appears asking you to confirm your choice, click **OK**.

Saving the Real-Time Dashboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a Real-time Dashboard display.
- Add a display chart to the Real-time Dashboard.

About this task

Save the Real-time Dashboard display window size and the following attributes of each Real-time Display chart:

- size and position of the window
- display type
- list of selected statistics
- list of selected skillsets or applications

Comments? infodev@avaya.com

Procedure

Close the Real-time Dashboard display window and select **Yes** on the Save dialog.

OR

Select **Save** from the **File** menu.

Making a public copy of a graphical display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Make a public copy of a billboard, or chart, or time line graphical display. After you customize the display, you can save it in your **Private Graphical Displays** folder. You can share the display with other users by making a public copy of it.

Note:

You can make public copies of all types of graphical displays, except agent maps and Real-time Dashboard displays.

If you want to modify a public display, you must first make a private copy.

Procedure

1. In the left pane, click the **Private Graphical Displays** folder.
2. In the list of displays, select the chart or billboard or time line display to copy.
3. At the bottom of the right pane, type the name of the display to appear in the **Public Graphical Displays** folder.

   You can only use alphanumeric characters in the display name; do not use special characters. If you type the same name as an existing copied display, you overwrite this display.

   When you copy a private display, the system gives the new display a default name in the format `[server name]_[private display name]`. Since each public display must have a unique name, you must type a new name, if you save a public display with the same default name. If you do not type a new name, the system overwrites the existing display.
4. Click **Make Public Copy** to save the private display in the **Public Graphical Displays** folder.

Assigning threshold alerts to a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create at least one private display. You can customize only the columns in private displays. If you choose a public display, you must first copy and save it in your Private displays folder before you can customize the columns.

About this task

You can use two threshold values, the low value (level 1) and the high value (level 2), to define system activity. These values result in three operational levels:

- Below level 1: Based on the type of statistic, this level can mean normal contact center operation and no action required (that is, the lower the number of calls waiting, the better), or it can signify an alert situation that requires attention (that is, the lower the service level percentage, the worse the situation).
- Between level 1 and level 2: This level can indicate a required action to prevent contact center performance to move beyond acceptable operating levels.
- Above level 2: Based on the type of statistic, this level can mean normal contact center operation and no action required (that is, the higher the service level percentage, the better), or it can signify an alert situation that requires attention (that is, the greater the number of calls waiting, the worse the situation).

Procedure

1. In the left pane, under the **CC** server, navigate to the private display.
2. In the right pane, click the **Columns** tab.
3. From the sample table, select the statistic for which to define the threshold colors.
4. From the threshold colors boxes, select the colors for the statistic if it is below the level 1 threshold value, if it reaches a value between level 1 and level 2, and if it exceeds level 2.
5. Click **Submit** to save your changes.

Configuring an agent map

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure an agent map to view a representation of all the agents to whom you have access in your contact center.

Comments? infodev@avaya.com

Note:

You cannot log out an agent, or change an agent's status, from an agent map; these actions are possible only from tabular displays.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new agent map. This is the name that appears in the system tree. You can only use alphanumeric characters in the agent map name; you cannot use special characters.
3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **Agent**.
5. In the **Presentation** area, confirm that **Agent Map** is selected.
6. Click **Edit Properties** to configure the new agent map.

   The Agent Map Properties dialog box appears.
7. In the **Agent map** title box, type the agent map name to appear at the top of the agent map display, or accept the default name. Do not include spaces, special characters, punctuation, or the ampersand (&) in the agent map title.
8. From the **Data collection mode** list, select **Moving window** or **Interval-to-date**.
9. From the **Agent Name** list, select how you want the agent name and login ID to appear in the header of each icon in the Icon view. You can choose from the following options:
   - agent first name, followed by last name
   - agent last name, followed by first name
   - agent first name and login ID
   - agent last name and login ID
10. From the **Linked Display** list, select the display.

    You can choose from all the private, public, and standard displays (both tabular and graphical) to which you have access to. If you choose nothing from the **Linked Display** list when you configure the agent map, the **Standard Agent Display** appears when you click **Linked Display**.
11. From the **Associated filter** list, select the agent filter to assign to the agent map.

    The filters containing agents appear.
12. In the **Threshold settings** area, click the colors to which the text in the box view agent map change, when a threshold level is exceeded.

    In the icon view, the agent icon changes to these colors when a threshold level is exceeded.

    When you choose the threshold colors, select colors that make the text easy to view against the agent state background colors in box view.

If you do not use a mouse, press **Tab** until the status bar indicates that you have reached the desired color. After reaching the desired color, press the **Spacebar** to select the color.

13. Select the **Text Flash on threshold** check box to view the text in the launched box view.

    The agent map flashes when a threshold level is exceeded. (This option is not applicable to the **View Agent Map Displays** icon.)

14. Select the **Hide logged out Agents** check box to view logged on agents only when you activate the agent map.

    If you do not select this check box, you see all agents in the filter that you attach to the display, both logged on and logged off.

15. In the **Agent State Colors** area, select the appropriate check boxes to choose the colors to shown for each agent state.
16. Click **Submit** to save your changes.

    The new agent map appears in the system tree under **Graphical Displays**.

Arranging agents in an agent map using drag and drop

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Launch an agent map display.

About this task

Position an agent within the agent map.

Procedure

1. On the agent map display, click the agent block to move within the display.
2. While pressing the left mouse button on the agent, drag the agent to the new position within the agent map.
3. Release the mouse button to leave the agent in the new position.
4. Click **Save Layout** to save the new arrangement.

Customizing the agent map layout

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Launch an agent map display.

About this task

Adapt an agent map layout to meet your requirements.

Procedure

1. In the agent map, click and drag the agent icons to the desired position.
2. To change the size of the window, place your cursor on the edge of the window until a two-headed arrow appears.
3. Click the edge of the window, and then drag it to the desired size.
4. Click **Save Layout** to save your changes. The next time you open the agent map, your custom layout appears.
5. To rearrange the icons automatically in the window, click **Tile Agents**.

Zooming in or out on an agent map display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Launch an agent map display.

About this task

While you look at the agent map in the box view, you can resize the display to 50, 75, 125, 150, 200, or 300 percent of normal size when you use the zoom feature. The resizing option does not apply to agent maps that appear in the icon view. When you resize an agent map, the text within the agent blocks are also resized, and the relative position of the icons are maintained. To return the display to the normal size, select 100 percent from the list.

If you resize an agent map to 50 percent of the normal size, the spacing between the agent map icons is halved.

Procedure

From the **Zoom** list, select a value to resize the agent map.

Activate a display from an agent map

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Configure an agent map.

About this task

On the agent map graphical display, you can view a grid display. When you customize the agent map, you can choose which display to view when you click the **Linked Display** button. You can

choose from all the private, public, and standard displays (both tabular and graphical) to which you have access.

If you do not configure which display to view with the Linked Display feature, the **Standard Agent Display** becomes the default display when you click the **Linked Display** button.

Procedure

On the agent map display, click **Linked Display**.

The display that you chose from the **Linked Display** list activates.

Activate an agent details window from an agent map

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Configure an agent map.

About this task

When you look at an agent map in box view, you can double-click the agent icons to view a separate window that lists details about the agent. The window displays the name, login ID, supervisor, position ID, and personal DN of the agent. You can double-click the agent icons in the display, for both logged on and logged off agents, to activate this details window.

Procedure

1. Launch the required agent map display.
2. Double-click an agent icon in the agent map display.

   A new window appears that lists the agent details.

Configuring a billboard display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure a billboard display to select a statistic to monitor closely.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new billboard graphical display. This is the name that appears in the system tree. You can use alphanumeric characters only.

3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **Application**, **IVR** or **Skillset**.
5. In the **Presentation** area, select **Billboard**.
6. Click **Edit Properties** to configure the new billboard display.
7. In the **Billboard title** box, accept the default name provided, or delete the default name and type a custom name to appear at the top of the billboard display.

   Do not include spaces, special characters, punctuation, or the ampersand (&) in the billboard title.
8. From the **Data collection mode** list, select either **Moving window** or **Interval-to-date**.
9. From the **Application** or **Skillset** list, select the application or skillset to monitor, or select **Summary**.
10. From the **Statistic** list, select the statistic to monitor in the billboard. The name of the statistic that you monitor appears in the title bar of the billboard display window when you activate it.
11. From the **Font color** boxes, select the color for the statistic.

    The background color of the billboard display is black until a threshold value is reached, at which time it changes to either of the threshold colors you selected, and the font color changes to black.

    If you do not use a mouse, press **Tab** until the status bar indicates that you have the selected color. After reaching the desired color, press the **Spacebar** to select the color.
12. From the **Threshold settings** boxes, click to select the colors for the thresholds below level 1, between level 1 and level 2, and above level 2, or accept the default colors shown.

    You can view the current Level 1 and Level 2 threshold values configured for this statistic in the Value boxes beside the threshold settings boxes.
13. Select the **Pop to front** check box to move the activated billboard to the front on your desktop when a threshold level is reached.

    The billboard display appears in front of all open windows. On each refresh, the billboard display continues to pop to the front of all open windows, until the data on the display falls below the threshold level.
14. Click **Submit** to save your changes.

    The new billboard appears in the system tree under **Private Graphical Displays**.

Configuring a chart display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure a chart display for skillsets, applications, or statistics to monitor in a customized chart.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new chart graphical display.

   This is the name that appears in the system tree. You can use alphanumeric characters only.
3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **Application**, **IVR** or **Skillset**.
5. If you select **Application**, in the **Presentation** area, select the **Chart (choose statistics per application)** or the **Chart (choose applications per statistic)**.
6. If you select **Skillset**, in the **Presentation** area, select the **Chart (choose statistics per skillset)** or the **Chart (choose skillsets per statistic)**.
7. If you select **IVR**, in the **Presentation** area, select **Chart (choose statistics for IVR summary)**.
8. Click **Edit Properties** to configure the new chart display.
9. In the **Chart title** box, accept the default name, or delete the default name and type a custom name to appear at the top of the chart display.
10. From the **Chart type** list, select the type of chart to configure. You can choose from **Horizontal Bar**, **Vertical Bar**, or **Pie**.
11. From the **Chart fill** list, select **Color** or **Pattern (Black & White)**.
12. If you select **Chart (choose applications per statistic),** or **Chart (choose skillsets per statistic)** from the **Statistics** list, select a statistic.
13. From the **Application** list, select an application to monitor. Choose **Summary** to view a summary of all applications in your partition.
14. For **Chart (choose statistics per skillset)**, from the **Skillset** list, select a skillset to monitor.
15. Choose **Summary** to view a summary of all skillsets in your partition.

    If you select **Summary**, the total for statistics such as Agents Staffed, Agents Active, Agents Not Ready, or Agents Idle is shown as 0 because one agent is typically assigned to more than one skillset, which results in misleading totals.
16. From the **Data Collection Mode** list, select the **Moving window** or **Interval-to-date**.
17. In the **Export path** box, type the path in which to save a copy of the chart that you export as a BMP or JPG file (for example, `C:\My Documents`). If you leave this field blank, the file is exported to your desktop.

18. If you select **Chart (choose statistics per application)**, **Chart (choose statistics for IVR summary)**, or **Chart (choose statistics per skillset)**, in the **Statistic** area, select the check box for each statistic to view in the chart display.
19. If you select **Chart (choose applications per statistic)**, in the **Applications** area, select the check box for each application to view in the chart display.
20. If you select **Chart (choose skillsets per statistic)**, in the **Skillsets** area, select the check box for each application to view in the chart display.
21. To select all check boxes, click **Select All**. To clear all check boxes, click **Clear All**.
22. Click **Submit** to save your changes.

    The new chart appears in the system tree under **Graphical Displays** and the Graphical Display window refreshes.
23. To create a public copy of your custom display, in the **Type in the name of your public display** box, type a name for the public display, and then click **Make Public Copy**.

    A copy of your display appears in the **Public Graphical Displays** folder.

Creating a private collection

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure and save your favorite combination of data windows.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new collection.

   This is the name that appears on the system tree. You can use only alphanumeric characters in the collection name; you cannot use special characters.
3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **All**.
5. In the **Presentation** area, select **Private Collection**.
6. Click **Edit Properties** to configure the new collection.

   The Private Collection Properties window appears.
7. From each display list, select a display to include in this collection.

The display lists include all of the public displays and private displays saved on the server. You can choose a maximum of six different displays.

You must configure the graphical displays on the server before you can include them in your collection.

8. Click **Submit** to save your changes.

   The new collection appears on the system tree under **Private Graphical Displays**.

Creating a private billboard collection

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure and save your favorite combination of billboards.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new collection or billboard collection.

   This is the name that appears on the system tree. You can use only alphanumeric characters in the collection name; you cannot use special characters.
3. From the **Server** list, select the **CC** server.
4. In the **Element Type** area, select **All**.
5. In the **Presentation** area, select **Private Billboard Collection**.
6. Click **Edit Properties** to configure the new collection.

   The Private Billboard Collection Properties window appears.
7. In the **Available** box, highlight each public or private billboard to include in your billboard collection, and then click the right arrow (**>**) to move the billboard to the **Selected** box.

   Private billboards are marked with an asterisk (*). You can choose from all public or private billboards on the server, up to a maximum of 25 billboards.
8. Click **Submit** to save the private billboard collection.

   The new billboard collection appears on the system tree under your **Private Graphical Displays** folder on the currently selected server.

Comments? infodev@avaya.com

Creating a public collection or public billboard collection

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

When you save a public display, you share it with all users that have access to public graphical displays on the selected server.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new collection or billboard collection.

   This is the name that appears on the system tree. You can use only alphanumeric characters in the collection name; you cannot use special characters.
3. From the **Servers** list, select the **CC** server.
4. In the **Element Type** area, select **All**.
5. In the **Presentation** area, select either **Public Collection** or **Public Billboard Collection**.
6. Click **Edit Properties**.

   The Public Collection Properties or Public Billboard Collection Properties window appears.
7. If you create a public billboard collection, proceed to step 10 on page 229.
8. From each display list, select a display to include in this collection.

   The lists include all the public grid and graphic displays that you save on the server. You can choose maximum six different displays.
9. Click **Submit** to save the public collection.
10. In the **Available** box, highlight each public billboard to include in your billboard collection, and then click the right arrow (**>**) to move the billboard to the **Selected** box.

    You can choose from all public billboards on the server, up to a maximum of 25 billboards.
11. Click **Submit** to save the public billboard collection.

    The new collection or billboard collection appears on the system tree under the **Public Graphical Displays** folder.

Configuring a Time Line display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure a time line display for skillsets, applications, or IVR statistics to monitor in a customized chart.

Procedure

1. In the Real-Time Reporting main window, from the menu, select **Displays** > **Add Graphical Display**.
2. In the **Name** box, type the name of the new time line graphical display.

   This is the name that appears in the system tree. You can use alphanumeric characters only.
3. From the **Servers** list, select the **CC** server.
4. In the **Element Type** area, select **Application**, **IVR**, or **Skillset**.
5. If you select **Application**, in the **Presentation** area, select **Time Line (choose statistics per application)** or **Time Line (choose applications per statistic)**.
6. If you select **Skillset**, in the **Presentation** area, select **Time Line (choose statistics per skillset)** or **Time Line (choose skillsets per statistic)**.
7. If you select **IVR**, in the **Presentation** area, select **Time Line (choose statistics for IVR summary)**.
8. Click the **Edit Properties** button.
9. In the **Chart title** box, accept the default name, or delete the default name and type a custom name to appear at the top of the time line display.
10. From the **Chart fill** list, select **Color** or **Pattern (Black & White)**.
11. If you select **Time Line (choose applications per statistic)**, or **Time Line (choose skillsets per statistic)** from the **Statistics** list, select a statistic.
12. From the **Application** list, select an application to monitor.
13. Choose **Summary** to view a summary of all applications on the server.
14. For **Time Line (choose statistics per skillset)**, from the **Skillset** list, select a skillset to monitor.
15. Choose **Summary** to view a summary of all skillsets on the server.

    If you select **Summary**, the total for statistics such as Agents Staffed, Agents Active, Agents Not Ready, or Agents Idle is shown as 0 because one agent is typically assigned to more than one skillset, which results in misleading totals.
16. From the **Data Collection Mode** list, select the **Moving window** or **Interval-to-date**.
17. From the **Refresh Rate (seconds)** list, select from the available refresh rates of **1**, **5**, **10** or **30** seconds.
18. From the **Display History (minutes)** list, select from the available history values of **1**, **5**, **10** or **30** minutes.

Comments? infodev@avaya.com

19. In the **Export path** box, type the path in which to save a copy of the chart that you export as a BMP or JPG file (for example, `C:\My Documents`). If you leave this field blank, the file is exported to your desktop.
20. If you select **Time Line (choose statistics per application)**, **Time Line (choose statistics for IVR summary)**, or **Time Line (choose statistics per skillset)**, in the **Statistic** area, select the check box for each statistic to view in the chart display.
21. If you select **Time Line (choose applications per statistic)**, in the **Applications** area, select the check box for each application to view in the time line display.
22. If you select **Time Line (choose skillsets per statistic)**, in the **Skillsets** area, select the check box for each application to view in the time line display.
23. To select all check boxes, click **Select All**. To clear all check boxes, click **Clear All**.
24. Click **Submit** to save your changes.

    The new chart appears in the system tree under **Graphical Displays** and the Graphical Display window refreshes.
25. To create a public copy of your custom display, in the **Type in the name of your public display** box, type a name for the public display, and then click **Make Public Copy**.

    A copy of your display appears in the **Public Graphical Displays** folder.

Chapter 43: Real-time report customization

The procedures in this section describe how to customize your real-time reports. You can customize real-time report displays and real-time report summary charts.

Adding a new column to a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

When you customize your private real-time display grids, you can add new columns by choosing from a list of available statistics.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.

   The folder expands to show a list of private displays.
2. Click the display to customize.
3. Click the **Columns** tab.
4. From the **Available Fields** list, select the statistic to add to the real-time display.
5. Click **Add Field**.

   The column appears in the sample display table.
6. Click **Submit** to save your changes.

Customizing display properties

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a private real-time display.

About this task

You can customize private display properties to meet your requirements.

Procedure

1. In the left pane, click the **Private displays** folder.
2. Click the real-time display to customize.
3. On the Properties page, select your customized settings.
4. Click **Submit** to save your changes.

Changing the refresh rate of a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a private real-time display.

About this task

A slight delay occurs between the events in the contact center and the statistics that you see in the displays. The length of the delay depends on the refresh rate settings in the Real-time Statistics Multicast (RSM) component and on the application server.

The refresh rate that you specify applies to both the private real-time displays and summary charts.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the display name.
3. In the right pane, click the **Properties** tab.
4. In the **Refresh rate** box, type the rate at which to refresh data in the real-time display.

   You can specify a minimum value of 0.5 seconds or a number from 1 to 99 (seconds).
5. Click **Submit** to save your changes.

Changing the font size in a real-time display grid

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Create a private real-time display.

About this task

You can select the font size for the column headings and the column data in your private real-time displays.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the display name.
3. In the right pane, click the **Properties** tab.
4. In the **Column font size** boxes, type the size for the column headings and the column data. You can choose a font size from 8 to 14.

   If you make no selection, the system applies the default font size of 8.
5. Click **Submit** to save your changes.

Changing the color settings of a real-time display grid

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can configure the color settings for the data, filter and site subtotals, and the summary rows of the real-time display grids. If you choose no custom color, the system applies the default colors to each area.

Procedure

1. In the left pane, navigate to the real-time display.
2. In the right pane, on the **Properties** tab, in the **Color settings** area, choose the color settings to appear in the real-time display grids.
3. Click **Submit** to save your changes.

Changing column names

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can change the column names of private displays. You can customize the columns of only private displays. If you choose a public display, you must first copy it and save it in your Private Displays folder before you can customize the columns.

Procedure

1. In the left pane, navigate to the real-time display to customize.
2. In the right pane, click the **Columns** tab.
3. To add columns to the display, from the **Available Fields** list, select a column, and then click **Add Field**.
4. In the **Column Name** box, type the new name to appear in the real-time display grid, and then press **Tab**.

   The new column name appears in the sample table.

   You can change as many names as you want.
5. After you change the names, click **Submit** to save your changes.
6. Click **Launch Display** to view the real-time display to see your changes.

Changing the column width in a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can customize the columns of only private displays. If you choose a public display, you must first copy it and save it in your private folder before you can customize the columns.

Procedure

1. In the left pane, under the server that contains the real-time display to customize, navigate to the display.
2. In the right pane, click the **Columns** tab.
3. Click the name of the column to resize.
4. In the **Column width** box, type the width of the column in characters.

   Note:

   You cannot make the column narrower than the column text. To shrink the column to the exact width of the column heading text, type a low number of characters in the **Column width** box (for example, type 5).
5. Click **Submit** to save your changes.
6. Click **Launch Display** to start the real-time display and to view your changes.

Rearranging columns in a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can rearrange the columns only of private displays. If you choose a public display, you must first copy it and save it in your Private Tabular Displays folder before you can customize the columns.

You cannot move the Site, Filter, Skillset, or Application column headings. However, you can choose the order in which they appear in the private network-consolidated real-time displays.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the private display to customize.
3. In the right pane, click the **Columns** tab.
4. Click the name of the column to move.
5. Click **Move Left** or **Move Right** to move the column heading to the desired position.
6. Click **Submit** to save your changes.

Changing the data collection mode of a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Specify the mode in which you want to view collected contact center data.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the display name.
3. In the right pane, click the **Properties** tab.
4. From the **Data collection mode** list, select the mode in which to view the collected data.
5. Click **Submit** to save your changes.

Comments? infodev@avaya.com

Changing the title of a real-time display grid

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

Select the title to appear at the top of each private real-time display grid.

Procedure

1. In the left pane, click the **Private Tabular Displays** folder.
2. Click the display name.
3. In the right pane, click the **Properties** tab.
4. In the **Display Title** box, type the title to appear at the top of the real-time display.

   If you do not type a title, the system applies the default title.
5. Click **Submit** to save your changes.

Deleting columns from a real-time display

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- You can customize the columns of only private displays. If you choose a public display, you must first copy it and save it in your **Private Tabular Displays** folder before you can customize the columns.

About this task

When you customize your private real-time display grids, you can delete any column except for the Site, Filter, Skillset, and Application columns.

Note:

If you delete the **Answered Skillset** column, the Contact Type icons do not display in the **Contact Status** column.

Procedure

1. In the left pane, navigate to the private display to customize.
2. In the right pane, click the **Columns** tab.
3. From the sample table, click the statistic to delete from the real-time display.
4. Click **Delete**.
5. Click **Submit** to save your changes.

Moving the chart contents within the window

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.

About this task

You can move the summary chart contents within the window frame to concentrate on specific areas of the chart.

Procedure

1. While viewing the chart, press **Shift**.
2. While pressing **Shift**, hold down both mouse buttons.
3. On the chart, move your mouse to drag the contents to the desired position.
4. Release **Shift** and the mouse buttons.
5. To restore the chart to the original state, press **R** on your keyboard.

Rotating a summary chart

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Open a summary chart.

About this task

Rotate a summary chart to view the complete content.

Procedure

1. While viewing the chart, press **Shift**.
2. While pressing **Shift**, hold down both mouse buttons.
3. Move your mouse in a circular direction.

   The chart contents rotate.

Increasing or decreasing the summary chart size

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Open a summary chart.

About this task

Customize the size of the chart contents within the chart frame. You cannot increase the size of the chart frame.

Procedure

1. While viewing the chart, press **Ctrl**.
2. While pressing **Ctrl**, hold down both mouse buttons.
3. On the chart, move your mouse upward to decrease the size of the chart contents or downward to increase the size of the chart contents.
4. After you adjust the size appropriately, release **Ctrl** and the mouse buttons.
5. To restore the chart to the original state, press **R** on your keyboard.

Zooming in on areas of a summary chart

Before you begin

- Log on to Contact Center Manager Administration Real-Time Reporting.
- Open a summary chart.

About this task

Zoom in on a summary chart to view specific information.

Procedure

1. While viewing the summary chart, press **Shift**.
2. While pressing **Shift**, click and drag to select the area of the chart to view more closely.
3. Release **Shift** and the mouse button.

   The area increases in size.
4. To restore the chart to the original state, press **R** on your keyboard.

Chapter 44: Historical Reporting

Using the Historical Reporting component, you can run and schedule performance and configuration reports. Reports help you monitor system performance by providing information about system activity. You can obtain standard reports which provide information about the past performance of the Contact Center and Contact Center configuration data. The data for historical reports is gathered from the Avaya Contact Center Select server.

Contact Center Manager Administration limits the number of scheduled reports that can run in parallel to five. Contact Center Manager Administration queues requests to run additional reports and executes these requests once a running report completes.

Note:

Avaya Contact Center Select limits the number of items shown in the document map of the Report Viewer to 5000. The document map is the navigation pane that appears on the left side of most reports. Once the limit is reached, Avaya Contact Center Select disables the document map and it is no longer visible in the Report Viewer. However, if there are multiple levels in the document map of a report, Avaya Contact Center Select removes the lowest level first and continues the removal until the number of items falls below 5000. For example, the document map for the Agent Performance report shows two items: Agent Name & ID, and the Date. If removing the Date from the document map reduces the number of items to 5000 or less, the Report Viewer displays the Agent Name & ID only. If Avaya Contact Center Select cannot reduce the number of items in the document map to 5000 or less, the document map is disabled.

Logging on to Historical reporting

Before you begin

- Ensure that you have access to Historical reporting.

About this task

To access Historical Reporting, log on to the Historical Reporting component in Contact Center Manager Administration.

Procedure

1. Log on to Contact Center Manager Administration.
2. On the **Launchpad**, click **Historical Reporting**.

The Historical Reporting window appears.

Opening a public, private, or shared report

Before you begin

- Ensure that you have access to public report groups in Access and Partition Management.
- Log on to Historical Reporting. For information, see Logging on to Historical Reporting on page 70.

About this task

Open a public, private, or shared report to view a historical report.

Procedure

1. In the left pane, select the server on which to view the list of reports.
2. Select one of the following folders:
   - **Public Report Templates**: This folder contains the standard report templates available in Avaya Contact Center Select. Run public reports on a demand basis, or save them in your Group or Private Report Templates folders and schedule the reports to run at a defined time. The Public Report Templates folder contains seven template folders corresponding to the following types of reports:
     - Agent Performance reports
     - Call-by-Call reports
     - Configuration reports
     - Contact Summary reports
     - Multimedia reports
     - Other reports
     - Outbound reports
   - **Private Report Templates**: This folder contains the report templates that you create by modifying an existing public, shared, or private report template, and saving your changes in your Private Report Templates folder. You can modify report information, schedule the report, and apply filters. For more information about creating private reports, see Creating a shared or private report on page 75.
   - **Group**: This folder contains shared report templates. When you customize a public or private report template and save it in your Group folder, all other users who have access to your group can run and schedule the group report templates.

Note:

In the Group folder, you can modify a report template only if you are the owner of the report template.

3. From the expanded list, select a report template to modify or schedule the template, or run the report on demand.

   The report properties appear in the right pane.

Running an Ad hoc report

Before you begin

- Ensure that you have access to the report folder that contains the report to run.
- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can specify the amount of data to include in an Ad hoc report by choosing the data range and applying selection criteria. After you customize your report, click **Run Now** to generate the report immediately. In the resulting Ad-hoc Report Viewer window, you can choose to print or save the report.

You can select the data range for agent performance and call-by-call reports before you generate them. You cannot select the data range for configuration reports.

Procedure

1. In the left pane, select the server that contains the report to run.
2. In the expanded list, select the folder that contains the report template to run.
3. Click the folder containing the report to run.
4. Select the report template to run.
5. To view the current report properties, in the right pane, click the following headings:
   - **Report Details**
   - **Selection Criteria**
   - **Data Range**
   - **Schedule**
   - **Output Options**: This section applies only if you previously scheduled the report.
6. To run the report with the current properties, proceed to step 8.

Comments? infodev@avaya.com

Note:

If you do not define the selection criteria, the system enforces partition rules to generate the report.

7. To define the selection criteria and the data range, see Defining the selection criteria on page 73.
8. To save your properties, in the **Save As** box, type a report name, choose a save location, and then click **Save Report**.
9. Click **Run Now** to generate the report.

Defining the selection criteria

Before you begin

- Log on to Historical Reporting.

About this task

You can select the elements to include in your reports by assigning filter elements to your reports. For example, in an agent performance report, you can choose the agents for whom to generate the report. You can define the selection criteria for public, private, and shared reports that you schedule or run on demand.

By default, if you do not define the selection criteria, the system applies partition rules to generate the report. However, if you select a filter element, you see only that element in the report. You can select a maximum of 300 elements from the available list to run the report. For example, you choose a skillset report and see a list of 20 skillsets in the Available filter elements box. If you select no skillsets, you see all 20 skillsets in the report, whereas if you select 3 skillsets, you see only 3 skillsets in the report. For two table reports, for example, Skillset By Agent Performance report, you can select 300 agents and 300 skillsets to run the Skillset by Agent Performance report.

The number of elements defined in a users partition profile is an important consideration when running historical reports. If the combined number of a particular element is greater than 300, then it is necessary for the user to select a subset of 300 elements or less in order to run that report. If no selection criteria is selected, all available elements to that user are applied to the report – Contact Center supports only 300 elements or less. Consider the following example:

A user is assigned three user defined partitions, configured as follows:

Partition Name	Elements
Sales Agents	Contains 200 agents
Support Agents	Contains 80 agents
Service Agents	Contains 50 agents

If the user runs the standard Agent Performance report, the report fails to run and displays this error: “The maximum number of elements supported by the SQL Query is 300. Select up to 300 elements to save/run this report or leave the selection criteria blank to report on all data.” This error appears because the user did not define any selection criteria and the maximum element limit is reached. In

a user defined partition, the number of elements must not exceed 300. If the number of elements exceeds 300, it has the same effect as defining a selection criteria of more than 300 elements. To avoid this, assign less partitions to the user or use standard partitions to allow reports to be run for all elements.

The filter elements available depend on the type of statistics included in the report. If you select multiple filter elements, only those that satisfy all filter criteria appear in the report. For example, if you choose to report on five agents and three activity codes, if one agent uses no activity code, the agent does not appear in the report.

Procedure

1. In the left pane, click the server that contains the report to define.
2. Expand the folder that contains the report template to use.
3. Click the folder containing the type of report to change.
4. Select the report to use.
5. In the right pane, click the **Selection Criteria** heading.
6. In the **Selection Criteria** area, enter information in the following boxes:
   - **Available** heading: Click this heading to view the available filter elements for this report. A table appears, listing the available elements. If multiple filters exist for this report, more than one **Available** table appears. Select the check box for each filter element to apply to the report, and then click **Update Selection Criteria**. The selected filter elements appear in the **Selected** table.
   - **Selected** heading: Click this heading to view the filter elements selected for the report. A table appears, listing the selected elements. To remove selected filter elements, clear the check box for each filter element, and then click **Update Selection Criteria**. The element appears in the **Available** table.
7. Click **Run Now** to generate the report.
8. To save your changes, click **Report Details**, in the **Save As** box, type a name, choose a save location, and then click **Save Report**.

Exporting an Ad hoc report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

Export a report to convert the visual display to a required format.

Procedure

1. In the left pane, click the server that has the report to print.

2. Double-click the folder with the report to print.
3. From the expanded folder, select the report.
4. In the right pane, click **Run Now** to generate the report with the specified properties.

   The Ad-Hoc Report Viewer appears and displays the generated report.
5. Click the **Export** drop-down menu and select an export type. Choose from Excel, PDF, or Word.
6. After you select the export type, you can choose to open or save the report in the chosen exported format.

Creating a shared or private report

Before you begin

- Ensure that you have access to the folder that contains the report to use.
- If you schedule the report, activate the schedule. See Activating a scheduled report on page 84.
- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can create custom reports if you change existing public, shared, or private report templates to suit your needs. Save them in your Group or Private Report Templates folders. When you save a report in your Group folder, you save a shared report; that is, you share the report with other users who have access to your Group folder.

If you do not want to use an existing report as the basis for your custom report, you must create a new report using Microsoft Report Designer and import it into the Contact Center Manager Administration Historical Reporting application. See Importing a report on page 78.

Procedure

1. In the left pane, select the server on which to create the report.
2. Navigate to the folder that contains the report template to use.
3. Click the report to change.
4. In the right pane, click the following headings:
   - **Selection criteria**.
   - **Data range** (not applicable for configuration reports)
   - **Schedule**
5. Click **Report Details**.

6. In the **Report Title** box, type the name to appear at the top of the generated report. If you do not type a new report title, the default title in this box appears at the top of the generated report.

   Note:

   If you save multiple copies of the same public report in your Group or Private report templates folders, change the report title to distinguish between reports when you generate them. If you do not change the report title, all copies of the same public report have the same standard title when you generate the reports.

7. In the **Save As** box, type the new report name.

   Note:

   If you choose a Public report template as the basis for your custom report, and you want to save the new properties that you enter, you must type a new name in the **Save As** box and specify whether to save it in your Private or Group folder. If you use an existing private or shared template as the basis for your custom report, you can choose to make a copy of the report by changing the report name in the **Save As** box, or you can leave the report name and overwrite the existing template with your changes.

8. From the **Location** list, select the save location for your custom report. You can choose between your Private and Group folders (if you have access to a group folder).
9. In the **Comment** box, type comments about the report.
10. From the **Time Zone** list, select the time zone in which you want to define the data range for this report, or accept the default time shown (the system defaults to the client's time zone). The data range depends on Contact Center time since the server stores the data. Therefore, the system always converts the data range times that you enter to Contact Center time.
11. Click **Save Report** to save your changes.

    The report appears in the Group or Private Report Templates folder on the server that you select.

Defining the report output

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can specify whether to print the scheduled report when it generates, save it as a file, or both. You can also specify one or more email addresses where the system can send a notification after the report generates.

If you save the report to a file, you must specify a shared folder to which the Contact Center server sends the output file. This folder can be on your computer, on another computer in the network, or

on the application server. To send the file to a folder on a computer in the network, the network computer must be accessible from the Contact Center server.

Procedure

1. In the left pane, click the server containing the report whose output options you want to define.

   The server expands to reveal a choice between **Public**, **Private**, and **Group** folders (if you have access to a group folder).

2. Expand the folder containing the report template to use.
3. Navigate to the report to edit.

   The report properties appear in the right pane.

4. Click the **Report Details** heading.
5. In the **Report Title** box, type the name to appear at the top of the generated report.

   If you do not type a new report title, the default title in this box appears at the top of the generated report. Do not include apostrophes (’) in the report title.

   Note:

   If you save multiple copies of the same public report in your Group or Private report templates folders, change the report title to distinguish between reports when you generate them. If you do not change the report title, all copies of the same public report have the same standard title when you generate the reports.

6. In the **Save As** box, type the new report name.

   The name appears in the system tree. This name cannot contain apostrophes (’) and it must be unique, if you save the report in the same folder.

7. From the **Location** list, select the folder in which to save your report. You can choose either **Private** or **Group** (if you have access to a group folder).
8. From the **Time Zone** list, select the time zone in which to schedule your report, or accept the system default (the system defaults to the client's time zone).

   Note:

   When you select the schedule time for your report, the system converts the time that you choose to the Contact Center server time, and gives the generated report the Contact Center server timestamp (if you choose a time zone other than the one on the Contact Center server).

9. Click the **Schedule** heading.

   The heading expands to reveal a series of boxes.

10. In the schedule area, enter the report schedule.
11. Click the **Output Options** heading.

    The heading expands to reveal a series of boxes.

The **Output Options** heading is disabled until you schedule the report.

12. In the **Output Options** area, choose the report output type:
    - **Print**: When you select this option, you can choose the printer, or accept the default printer shown. You can also select the paper size for the report from the **Paper Size** list.
    - **Output to file**: When you select this option, you must type the location where the report is saved in the **Output** box in the format `\\[computer name]\[shared folder name]\[file name]`. You can then choose the report file format. Choose between .doc, .pdf, or ,xls.
    - **Email Notification**: When you choose this option, you must enter an email address in the box provided. The system notifies you by email when the report run is finished and report is generated. To enable multiple users to receive notification that a report is generated, you can type multiple email addresses in the box, each address is separated by a semicolon (;). You can type a maximum of 255 characters in the email address box.
13. Click **Save Report** to save your changes.
14. To activate the schedule, in the left pane, select the **Scheduled Events** folder.
15. In the expanded folder, select the report that you just scheduled.
16. Click **Activate**.

    The system activates the schedule and outputs the report to the location that you specify.

Importing a report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can use the Report Template Importing Wizard to import report templates into Contact Center Manager Administration that you create using Microsoft Report Designer. When you import a report template, you save it on the Contact Center server. However, you access the report template by opening your Private Report Templates folder.

To share the report template with other users, you must save your private report in your Group folder (if you have access to a group folder). For more information, see Creating a shared or private report on page 75.

You can import two types of reports: Historical or Configuration.

Procedure

1. In the left pane, click the server to which to import the new report template.
2. On the **Report** menu, click **Import**.

   The system displays the Template Importing Wizard dialog box.

3. Click the **Browse** button next to the **Select Your Report template** field, and navigate to the report.
4. In the **Template Name** box, type the name of the report to import.
5. From the **Report is based on the following data** list, select the type of report.
6. If applicable, provide Database alias, timestamp, and report data range details.
7. Optionally, select **Synchronize report template from the network drive** to ensure the server automatically applies any updates made to the imported report.
8. Click **Import**.

   Follow the wizard prompts to import your report template to the server.

Editing a report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Ensure that you are familiar with defining selection criteria. See Defining the selection criteria on page 73.
- Ensure that you are familiar with scheduling reports. See Scheduling a report on page 81.
- If you edit a scheduled report, you must deactivate the schedule before you can save your changes. See Deactivating a scheduled report on page 85.

About this task

You can edit the properties of private reports or shared reports that you create and save in your Group folder. You can change properties such as the data range, the selection criteria, the schedule, and the report title. You must click **Save Report** to save the new properties.

You can change the properties of a public report template only if you save a copy of the template as a shared or private report. See Creating a shared or private report on page 75.

Procedure

1. In the left pane, click the server containing the report to edit.
2. Navigate to the report to edit.

   The system loads the report properties, and a series of headings appears in the right pane.
3. Click the **Report Details** heading.

   The heading expands to reveal a series of boxes.
4. In this section, you can change information in the following boxes:
   - **Report Title**: The title that appears at the top of the generated report. Do not include apostrophes (’) in the report title.
   - **Comment**: Type comments about the report.

- **Save As**: The name of the report. All reports saved in the same folder must have unique names. This name cannot include apostrophes (’). You must enter a name in this box when you save the report in a different folder. If you save the report in the same folder and do not change this name, the system overwrites the existing report with your new properties.
- **Save Location**: Select the folder in which to save the custom report. If you select Group, all members of your group have access to the report. If you select Private, only you have access to the report.
- **Time Zone**: Select the time zone in which to schedule or define the data range for this report, or accept the default time shown (the system defaults to the client's time zone). The data range depends on Contact Center Manager Server time since the server stores the data. Therefore, the system always converts the data range times that you enter to the Contact Center Manager Server time.

5. Click the **Selection Criteria** heading.

   The heading expands to reveal a series of boxes.

6. Specify the information to include in your report by assigning filter elements.
7. Click the **Data Range** heading.

   The heading expands to reveal a series of boxes.

8. Change the time range, during which the data collects, to specify the amount of data to include in your report.

   If the data range is None and disabled, the report does not require a data range.

9. Click the **Schedule** heading.
10. Indicate when and how often to generate your report.
11. Click the **Output Options** heading (only if you schedule the report). The heading expands to reveal a series of boxes.
12. Specify whether to save or print the report.

    You can enter email addresses on which the system sends a notification to indicate if the report generates successfully.

13. Click **Save Report**.

    Note:

    If you click **Run Now** to generate an on-demand report, property changes are not saved.

Comments? infodev@avaya.com

Printing an Ad hoc report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can print an on-demand report from the Ad-Hoc Report viewer.

Before you can print the report, you must run it. You can run the report with the current properties, or you can define the selection criteria and the data range, and then run the report. See Defining the selection criteria on page 73.

By default, if you do not define the selection criteria, all available data is included in the report when you run it. When you define the selection criteria, you can choose the data that you want to see.

For information about printing scheduled reports, see Defining the report output on page 76.

Procedure

1. In the left pane, click the server containing the report to print.
2. Double-click the folder containing the report to print.
3. From the expanded folder, select the report.
4. In the right pane, click **Run Now** to generate the report with the properties specified.

   The system displays the Ad-Hoc Report Viewer and the generated report.
5. Click the printer icon to print the report to the default printer configured on your computer.

Scheduling a report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Ensure that you are familiar with defining selection criteria.

About this task

You can schedule reports in your group and private folders to send a report to a file or to print a report, or both. You can also specify one or more email addresses where you can receive notification that the report generated, or if problems occurred that prevented it from generating successfully.

You can change the properties of a public report template only by saving a copy of the template as a shared or private report. See Creating a shared or private report on page 75.

If you choose to send the report to a file, you must specify a shared folder where the Contact Center server sends the file. This folder can be on your computer, on another computer in the network, or

on the application server. To send the file to a folder on a computer on the network, the network computer must be accessible from the Contact Center server.

Avaya recommends that you select a start time that does not exactly match an interval start time. If the scheduled report start time matches the start of an interval, it is possible that the report does not contain data for the previous interval. This happens when Contact Center does not complete writing interval data to the database before the scheduled report starts. This can occur because of, for example, the database size, or the volume of contacts processed in the interval. Avaya recommends that you avoid starting reports on the hour, or on fifteen, thirty, or forty-five minutes after the hour. Instead, schedule reports five minutes after intervals, for example 07:05 or 16:20.

Note:

The report schedule that you define cannot start in the p.m. range and end in the a.m. range. After the system converts your selected time to Contact Center server time, if the converted start time is in the p.m. range and the converted end time is in the a.m. range, an error message appears. In this case, you must re-enter the schedule start and end times, taking into account the time difference with the application server.

Procedure

1. In the left pane, click the server containing the report to schedule.
2. Expand the folder containing the report template to use.
3. Click the folder containing the report type to schedule.
4. In the expanded folder, select the report to schedule.
5. In the right pane, click the **Report Details** heading.
6. In the **Report Title** box, type the name to appear at the top of the generated report.

   Note:

   If you do not type a new report title, the default title in this box appears at the top of the generated report. Do not include apostrophes (’) in the report title.
7. If you save multiple copies of the same public report in your Group or Private report templates folders, change the report title to distinguish between reports.

   Note:

   If you do not change the report title, all copies of the same public report have the same standard title when you generate the reports.
8. In the **Save As** box, type the new report name.

   The name appears in the system tree. This name cannot contain apostrophes (’) and it must be unique, if you save the report in the same folder.
9. From the **Location** list, select the folder in which to save the report.

   You can choose either **Private** or **Group** (if you have access to a group folder).
10. From the **Time zone** list, select the time zone in which to schedule your report, or accept the system default (the system defaults to the client's time zone).

Comments? infodev@avaya.com

11. Click the **Selection Criteria** heading.
12. In the **Selection Criteria** area, click the **Available** and **Selected** headings to choose the selection criteria for the report.
13. Click the **Schedule** heading.
14. In the **Schedule** area, select the report schedule criteria.

    Note:

    If you select dates for the report to generate, the report generates for the selected dates each year for as long as the report is scheduled. For this reason, you cannot select to generate the report on February 29 in a leap year, as the following year is not a leap year.
15. Click the **Output Options** heading.
16. In the **Output Options** area, choose the report output:
    - **Report output**: Choose whether to print the report, send it to a file, or both.
    - **Printer**: Select the printer.
    - **Paper Size**: Choose the paper size.
    - **Output**: Type the path to the shared network folder in which to save the report.
    - **Format**: Select the report format.
    - **Save the file under different name each time**: Save each report with a unique name. If you do not choose this option, the system overwrites the existing report.
    - **Email Notification**: Select this option to receive an email notification after the report generates, or if the report does not generate successfully. Enter an email address in the box provided. The system notifies you by email when the report run is finished and the report is generated. To enable multiple users to receive notification that a report generated, you can type multiple email addresses in the box, each address is separated by a semicolon (;). You can type a maximum of 255 characters in the email address box.
17. Click **Save Report** to save your schedule.
18. Click **Activate** to activate the schedule.
19. To verify that the report schedule is active, select the **Scheduled Events** folder, and then locate the scheduled and activated report to view the status and properties.

Variable definitions

Variable	Definition
start time	The time in the selected range in which to generate a report. If you select the schedule time for your report, the system converts the time that you choose to the Contact Center Manager Administration server time

Variable	Definition
	and gives the generated report the Contact Center Manager Administration server timestamp (if you choose a time zone other than the one in the Contact Center Manager Administration server). Avaya recommends that you avoid starting reports on the hour, or on fifteen, thirty, or forty-five minutes after the hour. Instead, schedule reports five minutes after intervals, for example 07:05 or 16:20.

Printing a report schedule

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can use the Scheduled Events window to print the schedules of all reports scheduled by you.

Procedure

1. In the left pane, click the **Scheduled Events** folder. The list of your scheduled reports appears.
2. In the right pane, select a report, and then click **Print**.
3. In the message box that appears, select one of the following options:
   - **Print**: Click **Print** to print the entire list of scheduled reports shown in the window.
   - **Page Setup**: Use the **Page Setup** option to select the paper size of the printed schedules. If you choose **A4** or **Letter** size, the **Schedule Type** and **Status** columns do not appear on the print preview or the printed copy. If you choose **Legal** size, you can preview and print all the displayed grid columns.
   - **Print Preview**: You can preview the report schedule.

Activating a scheduled report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Schedule at least one report.

About this task

When you first schedule a report, or when you deactivate a scheduled report, you must activate it to schedule the report again. You can activate a report in one of two ways:

- Click **Activate** in the Report Properties window while you view a saved, scheduled, but inactive report.
- Click **Activate** in the Scheduled Events window.

This procedure shows you how to activate a report from the Scheduled Events window.

Procedure

1. In the left pane, click the **Scheduled Events** folder.
2. In the right pane, select the report to activate.
3. Click **Activate**.

   The scheduled report activates and runs according to the specified schedule.

Deactivating a scheduled report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Schedule and activate at least one report.

About this task

You must deactivate the report to pause the report run for an active scheduled report.

You must deactivate a report schedule before you change the report properties, or before you delete the scheduled report. To resume the report on schedule, you must reactivate the scheduled report after you make the changes.

You have two options to deactivate a scheduled report:

- In the Report Properties window while viewing a saved, scheduled, and activated report.
- In the Scheduled Events window.

This procedure shows you how to deactivate a report from the Scheduled Events window.

Procedure

1. In the left pane, click the **Scheduled Events** folder.
2. In the right pane, select the scheduled report to deactivate.
3. Click **De-Activate**.

Running a report from a different time zone

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.

About this task

You can select the time zone to run an on-demand report or schedule a report. The time zone that you select applies to the data range of the report and the report schedule. You can choose the time zone to appear in:

- the current computer time zone
- the Contact Center (server) time zone
- any other time zone

Procedure

1. In the left pane, select the server that contains the report to run.
2. In the expanded list, double-click the folder that contains the report to run.
3. Select the report to run.
4. In the right pane, click **Report Details.**
5. In the **Time Zone** field, select a time zone.
6. Click **Run Now** to generate the report.

Deleting a report

Before you begin

- Log on to Historical Reporting. For information, see Logging on to Historical reporting on page 70.
- Deactivate the schedule. See Deactivating a scheduled report on page 85.

About this task

You can delete reports from your private report templates folder and reports in your group folder that you create. You cannot delete public reports.

Deletions appear in the in the Audit Trail log.

Procedure

1. In the left pane, click the server from which to delete the report.

   The server appears to reveal a choice of Public, Private, and Group folders (if you have access to a group).
2. Navigate to the report to delete.

3. Right-click the report, and then click **Delete**.
4. In the confirmation dialog box, click **Yes**.

Chapter 45: Access and Partition Management fundamentals

You can use the Access and Partition Management component to create Contact Center Manager Administration users and to assign to users appropriate access privileges to the system. CCMA users can log on and use the CCMA components to which they have access. You can control user access privileges by assigning Launchpad options, access classes, and partitions, including reporting agent combinations.

You can use Access and Partition Management to add, edit, view, or delete:

- access classes
- report groups (you cannot edit report groups)
- standard partitions
- user-defined partitions
- Contact Center Manager Administration users

Chapter 46: Access classes

You can use access classes to control the actions that users can perform in the Contact Center Management, Real-Time Reporting, Historical Reporting, Configuration, Scripting, and Access and Partition Management components.

Creating an access class

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Ensure that you know what access levels you want to assign to users.

About this task

Create an access class to control the actions that the user can perform in the following Contact Center Manager Administration components:

- Contact Center Management
- Configuration
- Historical Reporting
- Real-Time Reporting
- Scripting
- Access and Partition Management (under the default Administration server)
- Prompt Management

Access classes do not apply to the Audit Trail, Outbound, or Multimedia components. To perform functions in these components, users require only Launchpad option rights to the components.

Procedure

1. On the menu, choose **Add** > **New Access Class**.
2. In the New Access Class window, in the **New Access Class Name** box, type the name of the new access class.

   Use a descriptive name for the user type having this access level, or the type of privileges available at this access level.
3. Click **Submit**.

4. In the left pane, click the new access class.
5. Click the **CC** server.

   The server access class elements appear in the Access Class Properties window.
6. From the list of access class elements, select the access levels for the elements that you want to make available to this access class.
7. Click **Submit** to save your choices on the server.

Editing an access class

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

Edit an access class to change any configured access class property except the access class name. To change the access class name, you must delete the access class and create a new access class with a new name.

Procedure

1. On the menu, choose **View/Edit** > **Access Classes**.
2. In the left pane, click the access class to edit.
3. In the left pane, click the **CC** server.
4. In the right pane, from the list of access class elements, select the access levels for the elements to make available to this access class.
5. Click **Submit** to save your changes.

Assigning an access class to a user

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

For each component controlled by access classes, you must assign at least one access privilege to the user, or the user sees nothing in the component.

If the user has basic access to Contact Center Management, you must assign the user an access class that includes CCM access, Skillset Assignment access, or Supervisor Assignment access. If

you assign the user an access class without at least one of these privileges, then the user sees nothing in Contact Center Management.

If the user has basic access to Historical Reporting, you must assign the user an access class that includes either Run and Import access or Report Creation access. If you assign the user an access class without either of these access levels, then the user cannot work in Historical Reporting.

If the user has basic access to Real-Time Reporting, you must assign the user an access class that includes either Launch access, Create Private access or Create Public access for either the tabular or graphical displays (or both). If you assign the user an access class without at least one of these access levels, then the user cannot work in Real-Time Reporting.

If the user has basic access to Configuration, you must assign the user an access class to the user that includes at least one of the Configuration access class elements, such as skillsets. If you assign the user an access class without at least one of these privileges, the user sees nothing in Configuration.

If the user has basic access to Scripting, you must assign the user an access class that includes privileges in at least one of the following Scripting components: Scripts, Script Variables, or Application Thresholds.

If you assign the user an access class without privileges in at least one of these components on at least one server, the user sees nothing in Scripting.

If the user has basic access to Prompt Management, you must assign the user an access class that includes at least one of the Prompt Management access class elements, such as Read Update Create/Delete or Read and Update. If you assign the user an access class without at least one of these privileges, the user sees nothing in Prompt Management.

If you assign a user to multiple access classes, Contact Center grants the highest level of access from the combined access classes to the user.

Procedure

1. On the menu, choose **View/Edit** > **User Administration**.
2. Select the user for whom you want to assign an access class.
3. Click the **Access Classes** heading.

   The list of configured access classes appears.
4. Select the check box for each access classes to assign to the user.
5. To assign all access classes, select the **Select All** check box.
6. To remove all access classes from the user, clear the **Select All** check box.
7. Click **Submit** to save your changes.

Viewing the users assigned to an access class

Before you begin

- Log on to CCMA.

- Open the Access and Partition Management component.

About this task

View the users assigned to an access class to see a list of Contact Center Manager Administration users assigned to the access class and access and partition details for each user.

This information is read-only; you cannot assign or unassign access classes in this window. For information about assigning and unassigning access classes, see Assigning an access class to a user on page 260.

Procedure

1. On the menu, choose **View/Edit** > **Access Classes**.
2. In the left pane, select the access class to view the list of assigned users.
3. In the Access Class Members window, click the **Members** heading.

   The list of users currently assigned to the access class appears in a table.
4. To sort the list of access class members alphabetically, click the **Members Name** heading.
5. To view the access and partition details for a user, click the user.

Deleting an access class

Before you begin

- Ensure that the access class has no members or that the existing members of the access class no longer require its access privileges.
- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

Delete an access class to remove it from Contact Center Manager Administration.

Procedure

1. On the menu, choose **View/Edit** > **Access Classes**.
2. In the left pane, right-click the access class to delete, and then click **Delete**.
3. In the message box that appears asking you to confirm your choice, click **Yes**.

Chapter 47: Report groups

Two categories of report groups are available in Historical Reporting:

- Public report groups—These report groups contain the standard public report templates. The seven public report groups are:
  - Agent Performance
  - Call-by-Call
  - Configuration
  - Contact Summary
  - Multimedia
  - Others
  - Outbound
- User-defined report groups—These report groups contain the report templates that users belonging to the group customized and want to share with other members of the report group. The user-defined report groups that you create in this window are for use in Historical Reporting. You can assign any unique name to these groups.

Public report groups versus user-defined report groups

Unlike the public report groups that contain all of the standard templates, user-defined report groups contain no standard templates. The user-defined report groups that you create in Access and Partition Management are folders for Historical Reporting users who belong to the same group to share their customized reports. Users can customize a standard template and save it in their group folder so that other group members can use the same custom report.

You can create user-defined report groups to reflect each department in your Contact Center, such as the Sales Group or the Marketing Group. If you configure a shared Contact Center, you can also create separate groups for each company sharing the Contact Center, such as the Best Air Group and the Econo Air Group. In this way, you can keep customized reports that contain company information separate from other companies in the same Contact Center.

The data shown in each report is based on the partitions assigned to the user and the selection criteria the user applies to the report.

You can use report groups to grant a user access to a very limited number of reports. For example, if you do not want to give a user access to any of the standard report templates, you can create a

user-defined report group and add it to the partition assigned to the user. When the user opens Historical Reporting, they see only the user-defined report group folder, and can only see reports that other members of the group saved in the group folder.

After you create a report group, you can add it to a partition created under the same server as the report group. Then you can assign the partition to the users belonging to the report group. When these users log on to Contact Center Manager Administration, they see the report group name in Historical Reporting under the server where you created it.

Assign standard report groups to a user in the same way as standard partitions. There is no requirement to create and maintain a user-defined partition. The standard partition “All User Defined Report Groups” can also be assigned to a user on a per-sever basis. This allows the user access to any user-defined report groups created on that server.

Creating a report group

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

Create a report group to create a custom group to reflect a specific department in the Contact Center, such as the Sales Group or the Marketing Group. You can also create separate groups for each company sharing the Contact Center. In this way, custom reports that contain company information can be kept separate from other companies in the same Contact Center.

You can use report groups to grant a user access to a limited number of reports. For example, if you do not want to grant a user access to any standard report templates, you can create a custom report group and add it to the partition assigned to the user. When the user opens Historical Reporting, the user sees only the custom report group folder. The user can see reports only that other members of the group save in the report group folder.

After you create a report group, you must add it to a partition created under the same server as the report group. Then you must assign the partition to the users belonging to the report group. When these users log on to Contact Center Manager Administration, they see the report group name in Historical Reporting under the server where you created it.

Procedure

1. On the menu, choose **Add** > **New Report Group**.
2. In the Report Group Properties window, in the **Report group name** box, type the name of the new report group.

   Use a descriptive, unique name for the user types assigned to this group or the company, or the department the group represents.
3. From the **Create the group under server** list, select the **CC** server.
4. Click **Submit** to save the report group.

5. Add the report group to a partition.

Deleting a report group

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

Delete a report group to remove a custom report group from Contact Center Manager Administration. You cannot delete any of the standard report groups included with Contact Center Manager Administration. However, you can delete the custom report groups that you create in Access and Partition Management.

Procedure

1. On the menu, choose **View/Edit** > **Report Groups**.

   Important:

   When you delete a report group, you delete all reports that users saved in it. Therefore, before you delete a custom report group, ensure that users who belong to the group do not require any of the custom reports that they saved in the group folder.

2. In the left pane, click the server containing the custom report group to delete.

   The list of report groups appears.

3. Click the report group to delete.
4. In the Report Group Properties window, click **Delete**.
5. In the message box that appears asking you to confirm your choice, click **Yes**.

   The report group and all saved reports are deleted.

Chapter 48: Standard partitions and reporting agents

Partitions restrict the data that users can view in the following components of Contact Center Manager Administration:

- Historical Reporting
- Real-Time Reporting
- Contact Center Management
- Scripting
- Prompt Management

Note:

Partitioning applies to script variables within the Scripting component of CCMA; however, partitioning does not apply to Orchestration Designer.

An administrator can use the following ways to partition the data that users see:

- Full data across all servers—When an administrator first creates a user, the user is assigned the Full Data Across All Servers option by default so the user can view all data on the Contact Center server.
- Server rights—An administrator can assign a user access to all data or no data on the server. To configure standard partitions and reporting agents on the Contact Center server, an administrator must assign the Configure option on the server.

Standard partitions (this includes report groups)—A Standard partition contains all data of a particular type on the server. The administrator can assign all data on a per-component basis (only among those components to which the user is granted basic access). For example, the administrator can choose to grant the user access to All agents and All skillsets in both Contact Center Management and Real-Time Reporting on the Contact Center server. The administrator can choose from:

- All Agents & Supervisors
- All Skillsets
- All Applications
- All CDNs (Route Points)
- All DNISs

- All Prompts
- All Script Variables
- All User Defined Report Groups
- All standard reports that are shipped with the software and selected components

Standard partitions are dynamic, which means that anytime a new data element is added to the system, it is automatically available to the Contact Center Manager Administration user. In this regard, Standard partitions are similar to Reporting Agents. Standard partitions can be assigned on a per-component basis. For example, the administrator can assign the All Skillsets partition to the Real-Time Reporting component only.

To assign a user a Standard partition, under Partitions, click the Standard & Reporting Agents heading, select the Standards tab, select the Configure option for the server and then select the server from the Configure Server list.

It is possible to assign Standard partitions by component:

- CCM—Contact Center Management
- RTR—Real-Time Reporting
- HR—Historical Reporting
- Scripting—Scripting Component
- PTM—Prompt Management

In the following example, all agents and supervisors and all skillsets are assigned to the Contact Center Management and Real-Time Reporting components while only all CDNs (Route Points) are assigned to the Historical Reporting component.

Reporting agents

Use the Reporting Agent feature to dynamically link supervisors and all their reporting agents with one or more Contact Center Manager Administration users, thereby enabling the users to view the agents in Contact Center Manager Administration components, such as Real-Time and Historical Reporting, and Contact Center Management. You assign Supervisor/Reporting agent combinations to Contact Center Manager Administration users by using the Reporting Agents tab in the Standard & Reporting Agents section in the User Properties window of Access and Partition Management.

User types

It is important to know the difference between a Contact Center Manager Server user and a Contact Center Manager Administration user.

User type	User definition	Created in
Contact Center Manager Server user	agents, supervisor/agents	Contact Center Management or the Configuration Tool
Contact Center Manager Administration user	anyone who logs on to Contact Center Manager Administration and monitors the performance and activities of Contact Center Manager Server using Contact Center Manager Administration; this user can be a supervisor user or an administrator user	Access and Partition Management

After you create a supervisor/agent Contact Center Manager Server user profile in Contact Center Management (or Configuration Tool), you must enable the supervisor/agent to log on to Contact Center Manager Administration. Therefore, you must also configure a Contact Center Manager Administration user profile for this supervisor/agent.

Users

Supervisors who do not need to use Contact Center Manager Administration do not need a Contact Center Manager Administration user profile; these supervisors require only a Contact Center Manager Server user profile.

When you configure the supervisor/agents Contact Center Manager Administration user profile, you can create a link between two user profiles (the Contact Center Manager Administration user profile and the supervisor's Contact Center Manager Server user profile) by using the Supervisors tab in the Standard & Reporting Agents area of the Partitions section in Access and Partition Management. Each name on the Supervisors tab represents a supervisor and all of their reporting agents by server. Therefore, when you link a supervisor's name with a Contact Center Manager Administration user, the user can automatically see all the supervisor's reporting agents.

This association is dynamic, meaning that each time a new agent is assigned to the supervisor, the agent is automatically associated with the supervisor's Contact Center Manager Administration user profile.

Use this feature to set up supervisors so they can view all of their own reporting agents, or you can enable one supervisor to see all the reporting agents of another supervisor. The following shows how to configure Reporting agents in Access and Partition Management.

Reporting agents and standard partition example

The company Best Air has two sales departments, Europe and Canada. The two corresponding supervisors for each department are Andrew Engel and Liz Matthews. The administrator creates two

new Contact Center Manager Administration users for the two supervisors and assigns them both the following standard partitions on the server:

- Contact Center Management—All Skillsets
- Real-Time Reporting—All Skillsets
- Historical Reporting—All standard report groups, all CDNs (Route Points), and all DNISs

The administrator assigned this reporting agent configuration for all available components: Contact Center Management, Real-Time Reporting and Historical Reporting. Additionally, each User profile is assigned as a Supervisor/Reporting Agent.

Result in real-time reporting

In Real-Time Reporting (including Filters), Andrew can use all skillsets as he is assigned the All Skillsets standard partition for this component. He can also see any agents reporting to him as he is configured with the supervisor “Andrew Engel” for all components.

Result in historical reporting

In Historical Reporting, Andrew can use all CDNs (Route Points) and DNISs as these standard partitions are assigned to his user properties. He can also use all agents reporting to him. This is true for both selection criteria and filters.

Andrew can also see all of the standard report groups as these are included in his Standard partition configuration.

Result in Contact Center Management

Andrew has access to all skillsets and only the agents that are assigned to him. In the Supervisors view, only one supervisor (himself) is displayed.

For Andrew Engel to view all of Liz's reporting agents, include Liz Matthews in Andrew's user profile (in the Reporting Agents Tab). The administrator can also specify the components to make available to these agents. If only a subset of these agents is required, you can create a user-defined partition and assign it to Andrew's properties. Assigning user-defined partitions is covered in the next section.

Assigning a standard partition to a user

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

- Create a Contact Center Manager Administration user.

About this task

You can use partitions to restrict the data that users can view in the real-time displays, historical reports, Contact Center Management, Scripting, and Prompt Management. You can assign standard and user-defined partitions to users in Contact Center Manager Administration. Choose the type that best suits your organization, or choose a combination of both types.

Use standard partitions to assign all data of a particular type to the user on a per-component basis. For example, you grant the user access to all agents and all skillsets in both Contact Center Management and Real-Time Reporting on the Contact Center server.

Procedure

1. On the menu, choose **View/Edit** > **User Administration**.
2. In the left pane, select the user to whom you want to assign a Standard Partition.
3. In the right plane, click the **Partitions** heading to assign partitions to the user.

   The heading expands to reveal a series of choices.
4. Clear the **Full Data Across All Servers** check box.
5. Click the **Standard & Reporting Agents** heading.
6. In the **Standard & Reporting Agents** area, select one of the following options for the Contact Center server:
   - No Data—Select this option if you do not want the user to see any data on the Contact Center server.
   - All Data—Select this option if you want the user to see all configured data on the Contact Center server.
   - Configure—Select this option if you want to specify the data that the user can see, and then proceed to the next step.
7. From the **Configure Server** list, select the CC server.
8. Select the **Standard** tab.
9. On the **Standard** page, select one or more of the following standard partitions:
   - All Agents & Supervisors
   - All Applications
   - All CDNs (Route Points)
   - All User Defined Report Groups
   - All DNIS
   - All Prompts
   - All Script Variables
   - All Skillsets
   - All User Defined Report Groups

Comments? infodev@avaya.com

- Standard Agent Performance Reports
- Standard Call by Call Reports
- Standard Configuration Reports
- Standard Contact Summary Reports
- Standard Multimedia Reports
- Standard Other Reports
- Standard Outbound Reports

  Only Contact Center Management, Real-Time Reporting, Historical Reporting, Scripting, and Prompt Management are applicable to partitions.

  If the check box for a standard partition is disabled under one of the component headings, then this partition is not applicable for this component. For example, applications are not applicable to Contact Center Management so the All Applications standard partition is disabled for this component.

10. Click **Submit** to save your changes.

Viewing the users assigned to a partition

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

View the users assigned to a partition to see a list of Contact Center Manager Administration users assigned to the currently selected partition.

This information is read-only; you cannot assign or remove partitions in this window.

Procedure

1. On the menu, choose **View/Edit** > **User Defined Partitions**.
2. In the left pane, select the partition for which you want to view the list of assigned users.
3. In the Partition Members window, click the **Members** heading.

   The list of users currently assigned to the partition appears in a table.
4. To sort the list of partition members alphabetically, click the **Members Name** heading.
5. To view the access and partition details for a user, click the user.

Editing user properties

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

Edit user properties to change properties such as the password, last name, and first name after you added the user to the database.

You cannot change a user name. Instead, you must delete the user and create a new user with the new user name.

Note:

You cannot change certain Administrator user properties, or delete the Administrator user.

Procedure

1. On the menu, choose **View/Edit** > **User Administration**.

   A list of configured users appears.
2. In the left pane, click the user whose properties you want to edit.
3. On the User Properties window, in the appropriate boxes, edit the following information about the user:
   - Password
   - Last name
   - First name
4. Click the **Access Classes heading** to review the access classes assigned to the user.
5. To change the user's Launchpad Options, select or remove any of the following:
   - Access and Partition Management access
   - Real-Time Reporting access
   - Historical Reporting access
   - Configuration access
   - Contact Center Management access
   - Scripting access
   - Emergency Help access
   - Audit Trail access
   - Outbound access
   - Multimedia
   - Prompt Management

6. Click the **Partitions** heading to review the current partitions assigned to the user. The heading expands to reveal a series of choices.
7. To grant the user full access to all data on the Contact Center server, select the **Full Data Across All Servers** check box.

   OR

   To refine the data that the user can see, clear the **Full Data Across All Servers** check box, and then proceed to the next step.
8. To review the standard partitions and supervisor/reporting agent combinations assigned to the user, click the **Standard & Reporting Agents** heading.

   OR

   If you do not want to make any changes to this area, proceed to step 16.
9. In the first table, there are three choices. You can choose a combination of all three. Select the option at the top of the table to make the same choice for all servers listed.
10. Select the **No Data** option for each server on which you do not want the user to see any data.
11. Select the **All Data option** for each server on which you want the user to see all configured data.
12. Select the **Configure** option for each server on which you want to specify the data that the user can see, and then proceed to the next step.
13. If you select the **Configure** option, from the **Configure Server** list, select the **CC** server.
14. To select standard partitions on the current server, select the check box for each item that you want the user to see in the applicable Contact Center Manager Administration component. You can choose from the following standard partitions:
    - All Agents & Supervisors
    - All Skillsets
    - All Applications
    - All CDNs (Route Points)
    - All DNIS
    - All Prompts
    - All Script Variables
    - All Custom Reports
    - All User Defined Report Groups
    - Standard Agent Performance Reports
    - Standard Call by Call Reports
    - Standard Configuration Reports
    - Standard Contact Summary Reports

- Standard Multimedia Reports
- Standard Other Reports
- Standard Outbound Reports

Important:

Only Contact Center Management (**CCM**), Real-Time Reporting (**RTR**), Historical Reporting (**HR**), Scripting (**SCR**), and Prompt Management (**PTM**) are applicable to partitions. When you select the **PTM** check box, the current user gains access to all the prompts for that server in the Prompt Management component.

15. To review the supervisor/reporting agents currently assigned to the user, click the **Reporting Agents** tab.

    The table lists all the supervisors configured on the currently selected server.

    Each supervisor name represents the supervisor and all their reporting agents.

16. To grant the current user access to the supervisor's reporting agents in the components that you select, select the check box for each supervisor.

    OR

    To select all supervisors in a particular component, select the check box for that component.

17. To review the user-defined partitions assigned to the user, click the **User Defined** heading.

    The heading expands to reveal the list of User Defined partitions configured on the Contact Center server.

18. Under the applicable components, select the check box for each partition to assign to the user.

    OR

    To select all partitions across a component, select the check box for that component.

19. Click **Submit** to save your changes.

Removing a partition from a user

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Before you remove a partition, ensure that the user does not need access to any of the partition properties.

About this task

When you remove a partition from a user, the user can no longer view the partitioned data in the real-time displays, historical reports, in Contact Center Management, or in Prompt Management.

Comments? infodev@avaya.com

Procedure

1. On the menu, choose **View/Edit** > **User Administration**.
2. In the left pane, select the user whose properties you want to edit.
3. In the User Properties window, click the **Partitions** heading.
4. To remove a standard partition from a user, click the **Standard & Reporting Agents** heading.
5. On the **Standard** tab, locate the partition to unassign, and clear the check box.

   You can assign or remove a standard partition based on a component (Contact Center Management, Historical Reporting, Real Time Reporting, Scripting, and Prompt Management).
6. To remove a User Defined partition, click the **User Defined** heading.
7. Locate the User Defined partition to unassign, and then clear the check box.

   You can assign or remove a User Defined partition based on a component (Contact Center Management, Historical Reporting, Real Time Reporting, Scripting, and Prompt Management).
8. Click **Submit** to save your changes.

Chapter 49: User-defined partitions

User-defined partitions are useful to restrict a user access to a specific list of data. You can use user-defined partitions in conjunction with standard partitions and reporting agents.

Important:

To improve performance, use standard partitions and reporting agents instead of user-defined partitions.

Use standard partitions in preference to user-defined partitions that contain all of a particular element, for example, All agents or All CDNs (Route Points) on a particular server. You can configure standard partitions in the user properties window. Standard partitions require no maintenance when you add new elements to the Contact Center Manager Server. Use user-defined partitions only if a specific set of data is required for the user.

When you edit user-defined partitions, note that the greater the number of users assigned to the partition that you edit, the greater your performance hit, particularly if these users have Real-Time Reporting filters configured.

Avaya recommends that you:

- Keep the amount of data included in each partition as minimal as possible because small partitions lead to more efficient application response time.
- Configure and assign your partitions according to your company internal departmental organization, granting users access only to the data that they regularly need to see.
- Use standard partitions where possible.

Partition properties

When you create a partition, you can specify the following types of data:

- agents
- skillsets
- report groups
- applications
- CDNs (Route Points)
- DNISs

- script variables
- prompts

When you assign a partition that contains all eight types of data to a user, the user sees either all data types in the partition, or a fraction of them, depending on the component to which the partition is assigned. The Contact Center Manager Administration components are each designed so users can work with particular types of data. For example, Contact Center Management is used strictly to configure and manage Contact Center supervisors and agents, and to assign agents to skillsets; therefore, the only partition elements that appear in Contact Center Management are agents and skillsets. If you configure for a user a combination of user-defined partitions, standard partitions and reporting agents, then the user sees the union of this data when using Contact Center Manager Administration components.

If you do not include certain types of data in a user's partition, then the user does not see this data. For example, if you do not include CDNs (Route Points) in the user's partition, then the user sees no CDNs (Route Points) in Historical Reporting.

A partition can contain any combination of the eight elements, but it does not have to contain all elements. For example, it can contain only skillsets and agents, but not CDNs (Route Points), applications, or report groups.

After you create the partition, you can select it in the user properties window, in the User Defined area of the Partitions section.

Partitions and your Contact Center

User-defined partitions are especially useful when competing companies share the same Contact Center. In the following example, the two companies that share the Contact Center are Best Air and Econo Air.

To grant users access to data pertaining only to their company, administrators can create partitions within the Contact Center and assign the partitions to different users, thereby restricting each user's view of the Contact Center data.

For example, there are 18 skillsets configured in Contact Center Manager Administration. Ten skillsets apply to agents answering calls for Best Air, while the remaining eight skillsets apply to agents answering calls for Econo Air. To divide the Contact Center so that supervisors see only the contact activity applicable to their company, the Contact Center administrator creates the following two partitions:

- The first partition contains the 10 Best Air skillsets and the agents that answer these calls.
- The second partition contains the 8 Econo Air skillsets and the agents that answer these calls.

After creating these partitions, the Contact Center administrator assigns them to the appropriate supervisors. When the supervisors view the Real-Time Reporting displays or the historical reports, they see only those elements in the partitions to which they belong.

Partitions can restrict only one element at a time. For example, when a user runs a Skillset by Agent Performance report, they can choose to view agents from among those in their partition configurations. However, sometimes an agent in the user's partition configuration is assigned to a

skillset that is outside the user's partition configuration. If a contact is routed to an agent for a skillset that is not in the user's partition configuration, then the call statistic (and possibly the skillset details) appear in the Skillset by Agent Performance report.

Partitions are also useful if you want to separate your Contact Center into different departments within the same company. For example, the administrator can create separate partitions for the Sales and Marketing departments, and assign each partition to supervisors working in each department.

When creating and assigning user-defined partitions, note that the following factors increase the performance hit for the users to whom you assign the partitions when they connect to Contact Center Manager Administration:

- The greater the amount of data that you include in each partition, the greater the performance hit.
- The more partitions you assign to users, the greater the performance hit.

Avaya recommends that you configure and assign your partitions according to your company internal departmental organization, granting users access only to the data that regularly need to see. Additionally, Avaya recommends that you use standard partitions whenever possible.

Creating a user-defined partition

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Create report groups.

About this task

User-defined partitions are different from the Standard partitions that come with Contact Center Manager Administration in that you specify certain types of data on the Contact Center server. For example, you can specify seven agents and two skillsets on the server. Standard partitions, however, include all of a certain type of data on the Contact Center server in particular components. For example, All Agents & Supervisors and All Skillsets on the Contact Center server in both real-time reporting and historical reporting.

Procedure

1. On the menu, choose **Add** > **New User Defined Partition**.
2. In the New Partition window, in the **New Partition Name** box, type the name of the new partition.
3. Click **Submit**.

   The user-defined partition appears in the left pane.
4. In the left pane, select the new user-defined partition.

   The partition name expands to reveal the CC server.

5. Click the **CC** server.

   The server partition elements appear in the partition properties window as a series of tabs.

6. To add agents to the partition, click the **Agents** tab.

   Important:

   If a large number of agents are configured on the server, when you click the Agents tab, wait a few moments while the system retrieves the agent data.

7. On the Agents page, click the **Assign Agents** heading. You can search for agents by name, supervisor, or by skillset.
8. To list all agents, click **List All**.
9. Select the check box for each agent to add to the partition.
10. To add skillsets, click the **Skillset** tab.
11. On the Skillset page, click the **Assign Skillsets** heading.
12. Search for skillsets or click **List All**.
13. Select the check box for each skillset to add to the partition.
14. To add report groups, click the **Report Groups** tab.
15. On the Report Groups page, select the check box for each report group to add to the partition.
16. To add applications, click the **Applications** tab.
17. On the Applications page, select the check box for each application to add to the partition.
18. To add CDNs (Route Points), click the **CDNs (Route Points)** tab.
19. On CDNs (Route Points) page, select the check box for each CDN (Route Point) to add to the partition.
20. To add DNISs, click the **DNISs** tab.
21. On the DNISs page, select the check box for each DNIS to add to the partition.
22. To add script variables to a partition, click the **Script Variables** tab.
23. On the Script Variables page, click the **Assign Script Variables** heading. You can search for script variables by name or type.
24. To list all script variables, click **List All**.
25. Select the check box for each script variable to add to the partition.
26. To add prompts to a partition, click the **Prompts** tab.
27. Select the check box for each prompt to add to the partition.
28. Click **Submit** to save your changes.

Variable definitions

Name	Description
Agents tab	When you click this tab, two sections appear. The first section displays the agents included in the partition and in the second section you can search for agents to add to the partition. Select the check boxes beside the agents you want to include; clear the check boxes beside the agents you do not want to include.
Skillsets tab	When you click this tab, two sections appear. The first section displays the skillsets included in the partition, and the second section displays the available skillsets to add to the partition. In the table of available skillsets, select the check boxes beside the skillsets to add to the partition, or select the Select All check box to add all skillsets to the partition. To remove a skillset currently in the partition, clear the check box beside the skillset, and then click Submit.
Report Groups, CDN (Route Points), DNISs, Applications tabs	When you click these tabs, a table appears from which you can select the items to add to the partition by selecting the check boxes beside the item. In each table, you can select the Select All check box to select all items in the table. To remove any items currently in the partition, clear the check box beside the item, and then click Submit.
Script Variables tab	When you click this tab, two sections appear. The Assigned section displays all script variables assigned to this partition. In the Assign section, you can search for script variables by name or type. You can also list all script variables. Use the check boxes to determine which variables are included.
Prompts Tab	When you click the **Prompts** tab, the system displays a table from which you can select the prompts to add to the partition by selecting the check box beside the prompt. You can select the **Select All** check box to select all prompts in the table. To remove any prompt currently in the partition, clear the check box beside the prompt. You can sort the prompts by **Prompt Name**. Once you have completed making your changes, click **Submit** to save your changes.

Editing a user-defined partition

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Create a user-defined partition.

About this task

Edit a user-defined partition to add new elements, remove elements, or add new servers to the partition.

Procedure

1. On the menu, choose **View/Edit** > **User Defined Partitions**.
2. In the left pane, click the partition to edit.

   The partition name expands to reveal the CC server.
3. Click the **CC** server.
4. In the Partition Properties window, click the tabs containing the elements to add to or remove from the partition.
5. To add an element, on the relevant page, select the check box for that element.
6. To remove an element, on the relevant page, clear the check box for that element.
7. Click **Submit** to save your changes.

Assigning a user-defined partition to a user

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Create at least one user-defined partition.
- Create at least one Contact Center Manager Administration user.

About this task

You can use partitions to restrict the data that users can view in the real-time displays, historical reports, and Contact Center Management. You can assign standard and user-defined partitions to users in Contact Center Manager Administration. Choose the type that best suits your organization, or choose a combination of both types.

User-defined partitions are different from the Standard partitions that come with Contact Center Manager Administration in that you specify certain types of data on the Contact Center server. For example, you can specify seven agents and two skillsets on the server. Standard partitions, however, include all of a certain type of data on the Contact Center server in particular components.

For example, All Agents & Supervisors and All Skillsets on the Contact Center server in both Real-Time Reporting and Historical Reporting.

Procedure

1. On the menu, choose **View/Edit** > **User Administration**.
2. In the left pane, select the user to whom you want to assign a user-defined partition.
3. In the User Properties window, click the **Partitions** heading.
4. Clear the **Full Data Across All Servers** check box.
5. Click the **User Defined** heading.

   The heading expands to reveal the list of user-defined partitions configured.
6. For each component, select each partition to assign to the user.

   OR

   To select all user-defined partitions for Contact Center Management, Real-Time Reporting, Historical Reporting, Scripting, or Prompt Management, select the **CCM**, **RTR**, **HR**, **SCR**, or **PTM** check boxes, respectively.
7. To list all current members assigned to this partition, click the partition name.
8. Click **Submit** to save your changes.

Deleting a user-defined partition

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Before you delete a user-defined partition, verify that it is not assigned to users who need to view the partitioned data.

About this task

Complete this procedure to delete a user-defined partition.

Procedure

1. On the menu, choose **View/Edit** > **User Defined Partitions**.
2. In the left pane, right-click the user-defined partition, and then click **Delete**.
3. In the message box that appears asking you to confirm your choice, click **Yes**.

Comments? infodev@avaya.com

Chapter 50: Contact Center Manager Administration users

These are the users who log on to Contact Center Manager Administration.

When you define Contact Center Manager Administration users, you assign to them:

- basic access to the appropriate components within the Launchpad Options section of Contact Center Manager Administration.
- access classes that control the actions they can perform in these components. You can view the Access Classes that you create in the Access Classes section.
- partitions and supervisor/reporting agent combinations that control the data they can see in these components. You can view the standard partitions and the list of all supervisors who are configured on each server in your network in the Standard & Reporting Agents area of the Partitions section. Each supervisor name represents the supervisor and all of their reporting agents. You can view the partitions that you create in the User Defined area of the Partitions section.

Users configured with Launchpad Options to Access and Partition Management access also require an access class with privileges set for each of the Access and Partition Management views. Users with full access rights in Access and Partition Management can perform almost all administrative functions.

Note:

You cannot delete the Administrator user.

Creating a Contact Center Manager Administration user

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Create access classes.
- Create user-defined partitions (optional).
- If the user has basic access to Contact Center Management, you must assign the user an access class that includes CCM access, Skillset Assignment access, or Supervisor Assignment

access. If you assign the user an access class without at least one of these privileges, the user cannot manage resources within Contact Center Management.

- If the user has basic access to Historical Reporting, you must assign the user an access class that includes either Run and Import access or Report Creation access. If you assign the user an access class without either of these access levels, the user cannot work in Historical Reporting.
- If the user has basic access to Real-Time Reporting, you must assign the user an access class that includes either Launch access, Create Private access or Create Public access for either the tabular or graphical displays (or both). If you assign the user an access class without at least one of these access levels, the user cannot work in Real-Time Reporting.
- If the user has basic access to Configuration, you must assign the user an access class to the user that includes at least one of the Configuration access class elements, such as skillsets. If you assign the user an access class without at least one of these privileges, the user cannot configure resources in the Configuration component.
- If the user has basic access to Scripting, you must assign the user an access class that includes privileges in at least one of the following Scripting components: Scripts, Script Variables, or Application Thresholds. If you assign the user an access class without privileges in at least one of these components, the user cannot work within the Scripting component.
- If the user has basic access to Prompt Management, you must assign the user an access class that includes at least one of the Prompt Management access class elements, such as Read Update Create/Delete or Read and Update. If you assign the user an access class without at least one of these privileges, the user cannot manage prompts in Prompt Management.

About this task

Create a Contact Center Manager Administration user to grant the users access to the appropriate components within Contact Center Manager Administration. Assign access classes to users to control the actions that they can perform, and assign supervisor/reporting agent combinations and partitions to users to control the data that they can see.

Procedure

1. On the menu, choose **Add** > **New User**.
2. In the User Properties window, in the **User Details** section, type the relevant information about the user in the following boxes:
   - User ID
   - First Name
   - Last Name
   - Password

   Important:

   You cannot modify the user ID after you add the user. You must delete the user and create a new one with the new name.
3. In the **Launchpad Options** section, select the check box for each of the following components that the user can access:
   - Access and Partition Management

Comments? infodev@avaya.com

- Real-Time Reporting
- Historical Reporting
- Configuration
- Contact Center Management
- Scripting
- Emergency Help
- Audit Trail
- Outbound
- Multimedia
- Prompt Management

4. In the **Access Classes** section, select the check box for each access class to assign to the user.
5. Click the **Partitions** heading to assign partitions to the user.
6. To grant the user full access to all data, select the **Full Data Across All Servers** check box, and click **Submit**.
7. To refine the data that the user can see, clear the **Full Data Across All Servers** check box.
8. To assign the user access to data, standard partitions, or supervisor/reporting agent combinations on particular servers, click the **Standard & Reporting Agents** heading.
9. In the **Standard & Reporting Agents** area, select one of the following options for each server:
   - No Data—Select this option if you do not want the user to see any data on the CC server.
   - All Data—Select this option if you want the user to see all configured data on the CC server.
   - Configure—Select this option if you want to specify the data that the user can see, and then proceed to the next step.
10. If you selected the **Configure** option for at least one server, from the **Configure Server** list, select the CC server.
11. On the Standard page, for each component, select one or more of the following Standard partitions:
    - All Agents & Supervisors
    - All Applications
    - All CDNs (Route Points)
    - All User Defined Report Groups
    - All DNIS
    - All Prompts

- All Script Variables
- All Skillsets
- All User Defined Report Groups
- Standard Agent Performance Reports
- Standard Call by Call Reports
- Standard Configuration Reports
- Standard Contact Summary Reports
- Standard Multimedia Reports
- Standard Other Reports
- Standard Outbound Reports

Important:

Only Contact Center Management (**CCM**), Real-Time Reporting (**RTR**), Historical Reporting (**HR**), Scripting (**SCR**), and Prompt Management (**PTM**) are applicable to partitions. When you select the **PTM** check box, the current user gains access to all the prompts in the Prompt Management component.

12. To grant access to reporting agents, or to grant access to the reporting agents of other supervisors, click the **Reporting Agents** tab.

    The Reporting Agents page lists all supervisors configured on the CC server. Each supervisor name represents the supervisor and all their reporting agents.

13. On the Reporting Agents page, under each component, select the supervisors for whom you want the user to have access.

    OR

    To select all supervisors for Contact Center Management, Real-Time Reporting, or Historical Reporting, select the **CCM**, **RTR**, or **HR** check boxes, respectively.

14. To assign a user-defined partition to the user, click the **User Defined** heading.

    The heading expands to reveal the list of user-defined partitions configured.

15. For each component, select each partition to assign to the user.

    OR

    To select all user-defined partitions for Contact Center Management, Real-Time Reporting, Historical Reporting, Scripting, or Prompt Management, select the **CCM**, **RTR**, **HR**, **SCR**, or **PTM** check boxes, respectively.

16. Click **Submit**, to save your changes.

Variable definitions

Name	Description
User ID	The name that users type when they log on to CCMA. **Important:** Do not use an ampersand (&) in the user ID.
First Name	The first name of the Contact Center Manager Administration (CCMA) user.
Last Name	The last name of the CCMA user.
Password	The user's password to access CCMA.
Submit	Save the information.
Create Copy	To create a new CCMA user based on the properties of an existing user, click Create Copy. When you click this button, the system copies all the user's properties, except the following: • User ID • First Name • Last Name • Password Type the user details for the new user, change any of the user's access and partition information (if desired), and then click Submit to save the new CCMA user.
Delete	Delete the current user.

Copying the properties of an existing Contact Center Manager Administration user

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

Copy the properties of an existing Contact Center Manager Administration user to create a new user based on the properties of an existing user.

Procedure

1. Select a user to copy.

   You copy all basic access rights, access classes, and partition information for the selected user.

2. Click **Create Copy**.
3. Type the new user details, change any partition or access information.
4. Click **Submit** to save the new user.

Deleting a Contact Center Manager Administration user

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.

About this task

Delete a Contact Center Manager Administration user to remove a user that is no longer required.

Procedure

1. On the menu, choose **View/Edit** > **User Administration**.
2. In the left pane, right-click the user to delete, and then click **Delete**.
3. Click **Yes**.

Assigning supervisor/reporting agent combinations to a user

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Create at least one Contact Center Manager Administration user.

About this task

When you configure a Contact Center Manager Administration user, you can assign the user one or more supervisor/reporting agent combinations to enable the user to see all the corresponding agents in the historical reports, real-time displays, and Contact Center Management. Each name on the Reporting Agents tab in the User Properties window represents a supervisor and all of their reporting agents on a per-server basis. Therefore, when you link a supervisor's name with a Contact Center Manager Administration user, you automatically enable this user to see all the supervisor's reporting agents.

Comments? infodev@avaya.com

Procedure

1. On the menu, choose **View/Edit** > **User Administration**.
2. In the left pane, click the user to whom you want to assign a supervisor/reporting agent combination.
3. In the User Properties window, click the **Partitions** heading.
4. Clear the **Full Data Across All Servers** check box.
5. Click the **Standard & Reporting Agents** heading.
6. In the **Standard & Reporting Agents** area, select one of the following options:
   - No Data—Select this option if you do not want the user to see any data on the CC server.
   - All Data—Select this option if you want the user to see all configured data on the CC server.
   - Configure—Select this option if you want to specify the data that the user can see, and then proceed to the next step.
7. If you selected the **Configure** option, from the **Configure Server** list, select the CC server.
8. On the Standard page, for each component, select one or more of the following Standard partitions:
   - All Agents & Supervisors
   - All Applications
   - All CDNs (Route Points)
   - All DNIS
   - All Prompts
   - All Script Variables
   - All Skillsets
   - All User Defined Report Groups
   - Standard Agent Performance Reports
   - Standard Call by Call Reports
   - Standard Configuration Reports
   - Standard Contact Summary Reports
   - Standard Multimedia Reports
   - Standard Other Reports
   - Standard Outbound Reports

   Important:

   Only Contact Center Management (**CCM**), Real-Time Reporting (**RTR**), Historical Reporting (**HR**), Scripting (**SCR**), and Prompt Management (**PTM**) are applicable to

partitions. When you select the **PTM** check box, the current user gains access to all the prompts for that server in the Prompt Management component.

9. To grant access to reporting agents, or to grant access to the reporting agents of other supervisors, click the **Reporting Agents** tab.

   The Reporting Agents page lists all supervisors configured on the CC server. Each supervisor name represents the supervisor and all their reporting agents.

10. On the Reporting Agents page, under each component, select the supervisors for whom you want the user to have access.

    OR

    To select all supervisors for Contact Center Management, Real-Time Reporting, or Historical Reporting, select the **CCM**, **RTR**, or **HR** check boxes, respectively.

11. Click **Submit** to save your changes

Configuring a supervisor/agent

Before you begin

- Log on to CCMA.
- Open the Access and Partition Management component.
- Create any required access classes.
- Create any required user-defined partitions.
- If you grant the supervisor/agent basic access to Contact Center Management, you must also assign an access class to the user containing at least one of the CCM, Skillset Assignments, or Agent to Supervisor Assignments access rights. If you do not assign this kind of access class to the user, then the user sees nothing in Contact Center Management. If the user's partitions do not contain any agents or skillsets, then the user sees no data in Contact Center Management.

About this task

When you create supervisor/agents in Contact Center Management and give them a Contact Center Manager Administration user ID and password to use Contact Center Manager Administration, their user profile automatically appears in Access and Partition Management under the Users folder. (In addition to being Contact Center users, they are also Contact Center Manager Administration users.) To properly configure these users, you must open their profile and give them basic access rights to the Contact Center Manager Administration components that they need to use.

When you configure these Contact Center Manager Administration users, you can assign the following to them:

- supervisor/reporting agent combinations—To enable the user to automatically see all of their reporting agents, or all the reporting agents of another supervisor. On the Reporting Agents tab of the User Properties window, click the check box beside the appropriate supervisor names.

Comments? infodev@avaya.com

- access classes—You must configure the access class that the user needs to work in Contact Center Management, and assign it to the user.
- partitions—In the User Properties window, assign the user the appropriate partitions containing the data that the user needs to see. You can assign a combination of standard partitions, user-defined partitions, or full data access.

Procedure

1. On the menu, choose **View/Edit** > **User Administration**.
2. In the left pane, select the user created in Contact Center Management.
3. In the User Properties window, click the **Launchpad Options** heading The heading expands to reveal a list of applications.
4. In the **Launchpad Options** section, select the check box for each of the following component that the user can access:
   - Access and Partition Management
   - Real-Time Reporting
   - Historical Reporting
   - Configuration
   - Contact Center Management
   - Scripting
   - Emergency Help
   - Audit Trail
   - Outbound
   - Multimedia
   - Prompt Management
5. In the **Access Classes** section, select the check box for each access class to assign to the user.
6. Click the **Partitions** heading to assign partitions to the user.
7. To grant the user full access to all data on the Contact Center server, select the **Full Data Across All Servers** check box, and click **Submit**.
8. To refine the data that the user can see, clear the **Full Data Across All Servers** check box.
9. To assign the user access to data, Standard partitions, or supervisor/reporting agent combinations on particular servers, click the **Standard & Reporting Agents** heading, and proceed to step 11 on page 291.
10. To assign user-defined partitions, click the **User Defined** heading, and proceed to step 17.
11. In the **Standard & Reporting Agents** area, select one of the following options:
    - No Data—Select this option if you do not want the user to see any data on the CC server.

- All Data—Select this option if you want the user to see all configured data on the CC server.
- Configure—Select this option if you want to specify the data that the user can see, and then proceed to the next step.

12. If you selected the **Configure** option, from the **Configure Server** list, select the **CC** server.
13. On the Standard page, for each component, select one or more of the following Standard partitions:
    - All Agents & Supervisors
    - All Applications
    - All CDNs (Route Points)
    - All DNIS
    - All Prompts
    - All Script Variables
    - All Skillsets
    - All User Defined Report Groups
    - Standard Agent Performance Reports
    - Standard Call by Call Reports
    - Standard Configuration Reports
    - Standard Contact Summary Reports
    - Standard Multimedia Reports
    - Standard Other Reports
    - Standard Outbound Reports

    Important:

    Only Contact Center Management (**CCM**), Real-Time Reporting (**RTR**), Historical Reporting (**HR**), Scripting (**SCR**), and Prompt Management (**PTM**) are applicable to partitions. When you select the **PTM** check box, the current user gains access to all the prompts for that server in the Prompt Management component.
14. To grant access to reporting agents, or to grant access to the reporting agents of other supervisors, click the **Reporting Agents** tab.

    The Reporting Agents page lists all supervisors configured on the selected server. Each supervisor name represents the supervisor and all their reporting agents.
15. On the Reporting Agents page, under each component, select the supervisors for whom you want the user to have access.

    OR

    To select all supervisors for Contact Center Management, Real-Time Reporting, or Historical Reporting, select the **CCM**, **RTR**, or **HR** check boxes, respectively.

16. To assign a user-defined partition to the user, click the **User Defined** heading.

    The heading expands to reveal the list of user-defined partitions configured on the Contact Center server.

17. For each component, select each partition to assign to the user.

    OR

    To select all user-defined partitions for Contact Center Management, Real-Time Reporting, Historical Reporting, Scripting, or Prompt Management, select the **CCM**, **RTR**, **HR**, **SCR**, or **PTM** check boxes, respectively.

18. Click **Submit** to save your changes.

Chapter 51: Outbound configuration

Avaya Contact Center Select supports outbound calls and campaigns. Use the Outbound Campaign Management Tool (OCMT) to create, modify, and monitor outbound campaigns. OCMT monitors a maximum of 100 simultaneous outbound campaigns with a maximum of 20 000 contacts (email or outbound) per campaign.

About Outbound Campaign Manager Tool

Use Outbound Campaign Manager Tool (OCMT) to create, monitor, and modify outbound telephone campaigns.

You can gain access to the components of OCMT from the toolbar on the left side of the OCMT window.

- **Create & Append**: Create a new campaign, or add call data to an existing campaign. You can add call data manually, import data from an external source, edit the data, and export the data.
- **Modify Campaign**: Pause, restart, or cancel a campaign. You can also change the properties of the campaign, including start date and time, end date and time, daily start and end time, and call rate.
- **Progress & Results**: Monitor an ongoing campaign, view results of a completed campaign, and print a campaign summary. The system displays information on the screen graphically in a pie or bar chart.
- **Agent Script**: Create and preview the agent script that includes an introduction and a conclusion, and design the interface for the questions with check boxes and drop-down lists for possible answers.
- **Disposition Codes**: Add, update, and delete disposition codes that you can use in the agent script.
- **General Settings**: View the Time Zone list and the configurations for the log files that are used to track problems in OCMT.

- **Help**: Get information on using OCMT.

Historical Reports

You can use historical reports to review campaign performance. Historical reports are available in the Historical Reporting component of Contact Center Manager Administration. Use the following standard historical reports to review outbound campaigns:

- Campaign Call by Call Details: Use this report to list all calls made for each campaign. If an agent does not process a contact, no call record exists in this report. If you select a data range for the report, the data range is based on Contact Closed Time.
- Campaign Script Result Details: Use this report to view the script answers for each campaign.
- Campaign Summary: Use this report to view a summary of each campaign and the disposition codes associated with each campaign.
- Script Summary: Use this report to view a summary of the answers for each agent script.

Scheduling callbacks

Agents can schedule callbacks using Agent Desktop. Agents specify a time and date for the scheduled callback. The Campaign Scheduler Service, which handles callback scheduling, runs at 10 minute polling intervals. If the agent schedules a callback to occur less than 10 minutes after the time of the original call, in certain scenarios the callback does not occur precisely at the scheduled time.

IP Office Default No Answer Time

The Minimum Dial Time specifies the length of time, in seconds, that Agent Desktop waits for the outbound call to be answered before disconnecting. In an Avaya Contact Center Select solution, the IP Office Default No Answer Time can affect the OCMT Minimum Dial Time setting. If the IP Office Default No Answer Time is set to a value lower than the OCMT Minimum Dial Time, the IP Office Default No Answer Time overrides the OCMT Minimum Dial Time value. You can configure the IP Office Default No Answer Time using IP Office Manager. The IP Office Default No Answer Time is set to 15 seconds.

Daily Start and Stop Times

When you define a campaign, you can specify a start time for the campaign. If you do not define the campaign start time, the campaign starts immediately. When you define the campaign start time, the campaign starts at the specified time. When the campaign starts, the system queues all contacts from that campaign to the chosen skillset. The system presents the contacts from the campaign to the agents who are assigned to that skillset.

To avoid calling customers at unsociable hours, you can define Campaign Dialing Hours, that is, the daily start and end time for a campaign. Use OCMT to specify a time the system starts to offer contacts to logged-on agents and a time the system stops presenting contacts to agents. For example, you can specify that the system offers contacts from the outbound campaign to agents who log on to the skillset at 08:00 and finish at 17:00.

Use Campaign Dialing Hours to ensure that you respect the regulatory requirements that surround dialing hours. You specify the time according to the local time of the location of the Contact Center server. You can use the Time Zone list to ensure that the calls made to other time zones also meet the regulatory requirements for dialing hours.

Outbound capacity management

OCMT monitors a maximum of 100 simultaneous outbound campaigns. You cannot define more than 500 active and inactive campaigns. Active campaigns are campaigns that are currently running, waiting to run (pending a start time), or are paused. Inactive campaigns are campaigns that are completed, or cancelled, or expired. You must regularly archive your campaigns to ensure operational efficiency.

Each campaign can have up to 20 000 contacts (email or outbound). However, in order to optimize the system, you must not have more than 1 million contacts in the Multimedia database. You can use the following strategies to ensure that you do not exceed this limit, if your contact center operates at high capacity:

- Define campaigns only as needed, for example by, creating campaigns immediately prior to their usage. This prevents campaigns that are not required for some time from building up in the database. To avoid affecting system performance, load contacts into a campaign during non-peak or out-of-office hours.
- Cancel campaigns that you do not require manually. Use the Pause capability to defer campaigns indefinitely. If you resume a campaign, the system does not present the contacts that are already completed to agents the second time. For more information, see Canceling a campaign on page 322.
- Archive completed, cancelled, and expired campaigns when you no longer need the campaigns for reporting purposes.

Logging on to Contact Center Manager Administration for Outbound

Before you begin

- Ensure that your contact center is licensed for Outbound campaigns.

About this task

Open the Outbound Campaign Manager Tool in Contact Center Manager Administration to configure, monitor, and maintain an outbound contact campaign.

Procedure

1. Log on to Contact Center Manager Administration.

2. On the CCMA Launchpad, select **Outbound**.
3. In the Left pane, select the CCMM server.
4. In the right pane, select **Install prerequisite software** and click **Launch Outbound Client**.
5. On the **File Download** box, click **Run**.

   The Outbound Campaign Manager Tool prerequisite software takes some time to install.
6. When you are prompted to run the Outbound Campaign Manager Tool, click **Run**.
7. After the install, the Outbound Campaign Manager Tool appears.

Defining campaign settings

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

About this task

Define campaign settings as the first step to creating an outbound campaign. You must define the following settings:

- campaign name
- campaign start date and time
- call priority
- daily start and end times (if required to comply with local laws)
- disposition codes

The following settings are optional:

- campaign description
- agent script
- dialer settings
- custom fields
- campaign end date and time

Procedure

1. In the Outbound Campaign Management Tool, click **Create & Append**.
2. On the **Campaign Settings** tab, click **Start Configuring New Campaign**.
3. Select **Create New Campaign**.
4. Under **Campaign Details**, type a name for the campaign and a description (optional).
5. Under **Campaign Start Date & Time**, select either **Start Immediately** or **Start at**.

Important:

The campaign scheduler interval impacts the actual campaign start date and time. For example, if a campaign starts at 9:00 AM and the campaign scheduler interval is one minute, the first contact is queued to the Contact Center Manager Server at 9:01 AM.

6. If you chose **Start At** to start the campaign at a later date, select the start date and time.
7. From the **Call Priority** list, select a priority from 1 to 6, where 1 is the highest.

   Consider the priority of your incoming calls when you select the priority for the outbound campaign. In most Contact Centers, incoming voice calls usually have a higher priority than outbound calls.
8. Under **Agent Desktop Script**, select a script. If you choose **None**, a script is not available for the agents who are handling the outbound calls in this campaign.

   If you want to save the agent script results for a campaign, you must create disposition codes with the Save Agent Script option “yes”, and you must instruct your agents to use the disposition codes that save the agent script answers when the contact is closed.

   The system disposition code Completed saves the agent script answers.
9. To display the optional fields, click **Additional Options**. To hide the optional fields again, click **Additional Options** again.
10. Select the Dialer option:
    - If you want the agent to dial the number, select **Manual Agent Dial (Preview)**.
    - If you want the call dialed automatically for the agent, select **Auto Dial Immediately (Progressive)**.
    - If you want the call dialed after the agent reviews the contact details, select **Auto Dial after (seconds)**, and then specify a number of seconds to allow the agent to review the information.
11. Click **Enable Minimum Dial Time**. If you enable the Minimum Dial Timeout, the telephone rings for the specified time. You can set a time between 1 and 180 seconds.

    The Minimum Dial Time setting prevents an agent from making a call and then immediately hanging up.
12. If the agent needs to dial a number to access an external line for an outbound call, in the **Trunk Access Code** box, type the digit or ASCII character.
13. Optionally, add a custom field. Use custom fields to map information in the imported call data that cannot be mapped to the standard fields, or to provide editable fields on Agent Desktop where the agent can gather additional information from the customer (for example, the customer's birth date).

    To add a custom field, in the **Custom fields** section click **Add**.

    In the Insert Custom Field dialog box, type the custom field name, and then click **Insert**.
14. To specify an end date for the campaign, click **Enable**, and then select the date and time.

Comments? infodev@avaya.com

15. To specify the campaign dialing hours, you can choose **Anytime**, **Local - Current Time Zone Only**, or **Use Customers Time Zone**. If you want to consider the Time Zones for all the customers, choose **Use Customers Time Zone**.

    For more information about the Use Customers Time Zone option, see Example of using time zones on page 299.

16. From the list of available **Disposition Codes**, select the codes available to the Agent at the end of the calls for this campaign.

Procedure job aid: Using time zones

After you select the Use Customer Time Zone option in a campaign, the Time Zone tab appears in the Call Settings section. On the Time Zone tab, you can check which calls are linked to what time zone by checking the Use Time Zone check box. Three possible results can occur:

- Match
- Partial Match
- No Match Found

A Match occurs when the international code and area code are found in your time zone list.

A Partial match occurs when the international code is found but an area code is not. For example, Ireland has an international code of 353 and Dublin has an area code of 1. If you are creating an outbound campaign to Ireland, if you do not want to put in every possible area code, a partial match on 353 puts the contacts into the first found time zone for an area code.

A No Match occurs when neither the international code nor the area code are found. In this case, the contact is called on the Contact Center server time zone.

Any contacts that result in a Partial Match or a No Match are highlighted on the grid. You can still create the campaign with these warnings.

Example of using time zones

About this task

This example creates a campaign configured for time zones by importing contacts from a text file.

Procedure

1. Log on to Contact Center Manager Administration and launch the Outbound Campaign Management Tool.
2. Click **Create & Append**.
3. In the **Name** box, type a unique name for the campaign (for example, My_Time_Zone_Camp).
4. Click **Additional Options**.

5. In the **Campaign Dialing Hours** section, select **Use Customers Time Zone** from the list.
6. Configure the remaining campaign settings as required, and then click the **Call Settings** tab.
7. On the **Call Data Import** tab, click **Import Call Data**.
8. On the **Select Import Type** dialog box, select **Import from Text File**.
9. Click **Next**.
10. Click **Browse** and navigate to your contact list text file.

    For this example, we are using the following contacts:

Steve	Smyth	17895555555
John	Doe	12105555555
Gary	lo	19075555555
Eddy	Walsh	19175555555
Mary	More	16045555555
Brian	Bush	15205555555

11. Click **Next**.
12. In the **Field delimiter** section, select **Tab**.
13. Click **Next**.
14. Map **Field 1** to **First Name** by dragging the Field 1 to the blank space to the left of First Name.
15. Map **Field 2** to **Last Name**.
16. Map **Field 3** to **Phone Number**.
17. Click **Finish**.
18. To split the phone number into an international code and an area code, click the **Call Data Cleanup** tab.
19. Click the **Split Phone Number** tab.
20. Beside **Split Field into**, select **Intl. Code**.
21. From the **Number of digits to split** list, select **1**.
22. Click **Split Phone Number**.
23. On the **OCMT Call Cleanup** message box, click **Continue**.

    The international code is removed from the Phone Number field and appears in the Intl Code field.
24. Beside **Split Field into**, select **Area Code**.
25. From the **Number of digits to split** list, select **3**.
26. Click **Split Phone Number**.
27. On the **OCMT Call Cleanup** message box, click **Continue**.

The area code is removed from the Phone Number field and appears in the Area Code field.

28. Click the **Skillset Assignment** tab.
29. From the **Attach This Skillset To Rows** list, select **OB_Default_Skillset**.
30. From the **..This Field Is..** list, select **Intl Code**.
31. In the **..To..** field, enter **1**.
32. Click **Update**.
33. Click the **Time Zone** tab.
34. Select the **Use Time Zone** check box.

    A message box appears, indicating that one call is in a warning state. This warning is highlighted on the Call Data Table as a Partial Match. You can either add a new time zone for this area code or accept the partial match. For this example, accept the partial match.

    If your contact list does not have an international code, you can use the International Code feature on the Time Zone tab to quickly fill the entire data grid.
35. Click the **Campaign Activation** tab.
36. In the Campaign Summary, ensure that **Time Zone** is set to **Enabled**.
37. Click **Create Campaign**.

    A message box appears indicating that no agent script has been configured for the campaign.
38. Click **Yes**.

    A message box appears stating that the campaign was created successfully.
39. Click **OK**.
40. To review your campaign, click **Progress & Results**.
41. In the **Campaign List** section, select **My_Time_Zone_Camp**.
42. Click the **Call Details** tab.

    You notice that not all contacts are running. The contacts that are currently in a waiting state are those that are not within the daily start and end times (9:00 to 18:00) in their time zone. You can also confirm the time zone for each contact under the Time Zone column.

Adding a time zone

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

About this task

A list of time zones is configured by default in the Outbound Campaign Management Tool, however the default time zones cover the common countries. You can create your own entries in the time zone list to ensure that outbound calls are placed at appropriate times for various time zones.

Important:

If you have more than one Area Code in a location, you must create a new entry in the Time Zone list for each area code.

Outbound campaigns do not support Daylight Saving Time. The scheduled outbound campaign is set according to the configured system time and adjusts according to the configured time zone, regardless of whether the server or the customer time zone observes Daylight Saving Time.

Procedure

1. On the OCMT toolbar, click **General Settings**.
2. Click the **Time Zone** tab.
3. Review the list of predefined settings to see if the required time zone setting is present. The default time zone settings include those settings for Europe and North America.
4. If the time zone is not configured, click **Insert**.
5. In the **Location Name** box, type the name of the town or city for your time zone.
6. In the **International Code** box, type the number that is used to dial out of the country.
7. In the **Area Code** box, type an area code for the numbers in your location.
8. In the **Time Zone** box, select the time zone for the location. The abbreviations are expanded when you hover your mouse over the list of possible time zones.
9. Click **Insert**.

Updating a time zone

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

About this task

Update a time zone to change the location name, international code, area code, or time zone.

Procedure

1. On the OCMT toolbar, click **General Settings**.
2. Click the **Time Zone** tab.
3. In the table, select the Time Zone you want to update.
4. Click **Update**.

Comments? infodev@avaya.com

5. In the **Update Time Zone** dialog box, make the required changes.
6. Click **Update**.

Deleting a time zone

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

About this task

Delete a time zone that is no longer required to remove it from the system.

Procedure

1. On the OCMT toolbar, click **General Settings**.
2. Click the **Time Zone** tab.
3. In the table, select the Time Zone you want to delete.
4. Click **Delete**.
5. In the message box, confirm the deletion and click **Yes**.

Importing call data from a text file

Before you begin

- Prepare the call data in a text file.

  Important:

  Ensure that the data you prepare for import does not contain information that violates legal requirements, such as numbers on a national or international Do Not Call register.
- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define the campaign settings. See Defining campaign settings on page 297.

About this task

Import call data from a text file database into your new outbound campaign to save time and prevent data entry errors. You can also add call data manually.

You can also import call data from one of the following sources:

- ODBC database (Open Database Connectivity)—The database can be a user or system DSN, or a file DSN from the directory where the file DSNs are stored. Note: A user name and password can be required. See Importing call data from an ODBC database on page 305.

- Existing campaign—You can import call data from any existing campaign. See Importing call data from an existing campaign on page 306.

Procedure

1. In the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. On the bottom of the **Call Settings** page, click the **Call Data Import** tab.
4. Click **Import Call Data**.

   If the call data table already contains data, a confirmation message appears.
5. To replace the information in the Multimedia database, select the **Overwrite existing customer data with new customer data** option.
6. In the Select Import Type window, select the **Import From Text File** option.
7. Click **Next**.
8. Click **Browse** to navigate to the appropriate directory.
9. Select the file, and then click **Open**.
10. Click **Next**.
11. To select how the fields are separated in your source file, click Tab, Space, or Character. The default character is a comma.
12. To import a selection of records only from the source file, select the **Enable Record Selection** check box, and then select the beginning and end of the range of records to be imported.
13. If the first row of the source file contains column headers, select the check box.
14. Click **Next**.
15. In the **File Source Fields** box, click the first field name.
16. Drag the name to the **Mapping** column on the appropriate line of the OCMT Fields table.
17. To see which data Field #1 contains, refer to the **Mapping Results** table.
18. Check the mapping for all File Source Fields.

    Important:

    If the area code and/or international code is in the same field as your telephone number in the source file, map that field to Phone Number in the OCMT Fields. You can split the number up into international code, area code and phone number in the Call Settings window.
19. Review the **Mapping Results** table.
20. To remove the mapping, select the mapping column in the **OCMT Fields** table and click **Clear Mapping**.
21. When you are satisfied with the mapping, click **Finish**.

Importing call data from an ODBC database

Before you begin

- Prepare the call data in an ODBC database.

  Important:

  Ensure that the data you prepare for import does not contain information that violates legal requirements, such as numbers on a national or international Do Not Call register.
- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.

About this task

Import call data from an ODBC database into your new outbound campaign to save time and prevent data entry errors. You can also add call data manually instead of, or after you import call data.

You can also import call data from one of the following sources:

- Text file—The data fields within a text file can be in any order; however, the order and the delimiter must be consistent throughout the file. See Importing call data from a text file on page 303.
- Existing campaign—You can import call data from any existing campaign. See Importing call data from an existing campaign on page 306.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. On the bottom of the Call Settings page, click the **Call Data Import** tab.
4. Click **Import Call Data**.

   If the call data table already contains data, a confirmation message appears.
5. To replace the information in the Multimedia database, select the **Overwrite existing customer data with new customer data** option.
6. In the Select Import Type window, select the **Import From ODBC** option.
7. Click **Next**.
8. To select an **ODBC System DSN**, select the ODBC System DSN from the list.
9. To select an **ODBC User DSN**, select the ODBC User DSN from the list.
10. To select an **ODBC File DSN**, click **Browse** and then navigate to the location of the DSN file.
11. Select the DSN file and click **Save**.
12. If the ODBC source requires a logon ID, in the **Login Information** section, type the user name and password.

13. Click **Next**.
14. Click the table name or view name from which to import.
15. Click **Next**.
16. In the **Data Source Table Columns** box, click the first column name.
17. Drag the column name to the **Mapping** column on the appropriate line of the **OCMT Fields** table.
18. Check the Data Source Table Columns mapping for all **Data Source Table Columns.**
19. If the area code and/or international code is in the same field as the telephone number in the source database table, map that field to **Phone Number** in the fields.

    You can use the Call Settings window to split the number up into international code, area code and phone number.
20. To remove the mapping, select the mapping column in the **OCMT Fields** table and click **Clear Mapping.**
21. To import only a selection of records from the source file, click the **Select Range** check box, and then select the beginning and end of the range of records to import.

    If the start record is the same as the end record, the data in that record (at least one) is imported.
22. When you are satisfied with the mapping, click **Finish**.

Importing call data from an existing campaign

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.

About this task

Import call data from an existing campaign into your new outbound campaign to save time and prevent data entry errors. You can also add call data manually. See Adding call data manually on page 307.

Avaya recommends that you ensure the new campaign uses the same custom fields as the campaign from which you are importing call data. You can ensure this by clicking Start Configuring New Campaign and selecting Create using previous campaign settings. and choosing a previous campaign. A list of available campaigns appears. Select the campaign you want to import contacts from and click OK.

Procedure

1. Click **Create & Append**.

2. Click the **Call Settings** tab.
3. On the bottom of the Call Settings page, click the **Call Data Import** tab.
4. Click **Import Call Data**.

   If the call data table already contains data, a confirmation message appears.
5. To replace the information in the Multimedia database, select the Overwrite existing customer data with new customer data option.
6. In the Select Import Type window, select the **Create From Existing Campaign** option.
7. Click **Next**.
8. From the list, select the appropriate campaign.
9. Click **Next**.
10. To import all calls, select the **Import All Calls** option.
11. To filter the calls to import, select the **Filter Calls** option.
12. In the **Call Filter** list, select the check box for each Disposition Codes that determine which calls to import.
13. Click **Finish**.

Adding call data manually

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.

About this task

Add call data manually if you have no data to import to add the information to the call record for an outbound campaign.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. Click in the first empty row of the **Call Data Table**.
4. Type the customer information in the appropriate fields.

Validating a telephone number or code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.
- Add call data using an importing method, or by adding call data manually.

About this task

Validate a telephone number or code to ensure that the Phone Number, Area, and Intl Code columns contain only numbers and spaces. You must ensure that there are no non-numeric characters, such as hyphens or brackets.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. Click **Call Data Cleanup**.
4. On the **Call Data Cleanup** page, click **Validate Call data**.

   The Call Validation window reports how many calls failed validation and gives you the option to delete or review these calls.
5. To review and correct the data, click **Review**.

   The invalid calls are highlighted in the table.
6. To delete all the invalid calls, click **Delete**.

Inserting text

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Insert text into the call data to replace or change customer data for the outbound campaign. You can append, prepend, or replace the existing text.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.

3. Click **Call Data Cleanup.**
4. Click the **Insert Text** tab.
5. Select one of the text change options, overwrite, prepend, or append.
6. In the **Text to Add** box, type the text you want to append, prepend, or replace in a field.
7. From the **Select Field** list, select a column to change or replace the text.
8. To search for and replace text in all rows of the table, click **All Calls**.
9. To search for and replace text in only selected rows of the table, select the specific rows, and then click **Selected Calls**.
10. Click **Insert Text**.
11. Click **Continue** to confirm you want to add the selected text.
12. Click **OK**.

Procedure job aid

Value	Variable
Overwrite	Replace the current contents of the field.
Prepend	Add the text to the beginning of the current text in the field.
Append	Add the text to the end of the current text in the field.
Text to add	Type the text you want to appear.

Removing text

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Remove text from the Call Data table that is no longer valid.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. On the Call Settings page, click **Call Data Cleanup**.
4. Click the **Remove Text** tab.

5. In the **Text to remove** box, type the text for which to search and remove
6. To remove all text from the selected column, click **Remove All Text**.
7. From the **Select Field** list, select the column from which to search and remove the text.
8. From the **Occurrence** list, select the option that describes what you want to remove.
9. To search for and remove text in all rows of the table, click **All Calls**.
10. To search for and remove text in only selected rows of the table, select the specific rows, and then click **Selected Calls**.
11. Click **Remove Text**.
12. Click **Continue** to confirm that you want to delete the selected text.
13. Click **OK**.

Replacing text

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Replace text in your Call Data table with corrected information in one location or more.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. Click **Call Data Cleanup**.
4. Click the **Replace Text** tab.
5. In the **Text to replace** box, type the existing text for which to search and replace.
6. In the **Text to replace with** box, type the new text to replace.
7. From the **Select Field** list, select the column from which to search and replace the text.
8. To search for and replace text in all rows of the table, click **All Calls**.
9. To search for and replace text in only selected rows of the table, select the specific rows, and then click **Selected Calls**.
10. Click **Replace Text**.
11. Click **Continue** to confirm that you want to replace the selected text.

12. Click **OK**.

Splitting a phone number

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Split a phone number in your Call Data table if the international code or area code is combined with the telephone number in the imported data. You must ensure that the phone number in the Call Data table is valid by removing a specified number of digits from the beginning of the Phone Number and adding those digits to the selected Intl or Area Code column.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. Click **Call Data Cleanup**.
4. Click the **Split Phone Number** tab.
5. From the **Split Field into** list, select **Intl Code** or **Area Code**.
6. In **Number of digits to split**, type or select the number of digits to remove from the **Phone Number** and add to the selected **Code** column.
7. To split the phone number in all rows of the table, click **All Calls**.
8. To split the phone number in only selected rows of the table, select the specific rows, and then click **Selected Calls**.
9. Click **Split Phone Number**.
10. Click **Continue** to split the phone number.
11. Click **OK**.

Adding area and international codes

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Add area and international codes if your imported data does not include area and/or international codes to ensure that your Call Data is complete. You can add the same code to multiple rows at the same time.

This operation overwrites existing data in the selected column and rows.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. At the bottom of the **Call Settings** tab, click **Call Data Cleanup**.
4. Click the **Insert Text** tab.
5. Select **Overwrite**.
6. In the **Text To Add** box, type the international code or area code to add.
7. In **Select Field**, select either **Intl Code** or **Area Code** in which to add the code.
8. To add the code in all rows of the table, click **All Calls**.
9. To add the code in only selected rows of the table, select the specific rows, and then click **Selected Calls**.
10. Click **Insert Text**.

Checking the length of fields

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Check the length of fields in the Call Data table to determine the validity of a field in a customer record. For example, you can see which records contain the incorrect number of digits for the telephone number. When the search results appear, you can either correct the content of the field or delete the record.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.

3. On the Call Settings tab, click **Call Data Search**.
4. Click the **Length Search** tab.
5. From the **Select Field** list, select the column on which to search the length.
6. In the **Operation** box, select that mathematical operation that applies to your search:
   - Greater than
   - Equal to
   - Less than
7. In the **Number of digits** box, type or select the number of digits that each entry in the column must contain.
8. If you want the length check to ignore spaces, select the **Ignore Spaces** check box.
9. To check the length on specific rows of the table, select the rows, and then click **Selected Calls**.
10. Click **Search**.

    Call data that matches your criteria are highlighted and moved to the top of the Call Data Table.
11. Change the data.
12. To delete the rows, click **Delete Checked Calls**.

Checking for alphabetic characters

Before you begin

- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Check the fields for particular alphabetic characters or symbols to correct the data or delete the entire record from the Call Data table in the outbound campaign.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. On the Call Settings page, click **Call Data Search**.
4. Click the **Numeric Search** tab.
5. From the **Select Field** list, select the column on which to do the digit check.
6. To do the digit check on specific rows of the table, select the rows, and then click **Selected Calls**.

7. Click **Search**.

   Rows that include non-numeric characters in the selected column are highlighted and moved to the top of the table.

8. Change the data.
9. To delete the rows, click **Delete Checked Calls**.

Checking for a value

Before you begin

- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Check for fields that contain a specific value (for example, to find records with a particular area code) in your Call Data table to ensure that the records are all valid. For example, you can search for records where the telephone numbers are not in your local area.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. On the Call Settings page, click **Call Data Search**.
4. Click the **Value Search** tab.
5. From the **Select Field** list, select the column on which to do the value search.
6. In the **Operation** box, select the operation for the required condition:
   - Equal to
   - Not equal to
   - Contains
   - Does not contain
7. In the **Select Value** box, type the information that corresponds to the operation and selected field to locate.
8. To do the length check on specific rows of the table, select the rows, and then click **Selected Calls**.
9. Click **Search**.

   Call data that matches your criteria are highlighted and moved to the top of the Call Data table.

10. Change the data.

11. To delete the rows, click **Delete Checked Calls**.

Checking for duplicate call data

Before you begin

- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Check the records in your Call Data table for duplicates in a field or in fields that you select. You can choose to delete all duplicate records, to review them before changing or deleting them, or to allow duplicate calls in the campaign.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. At the bottom of the Call Settings page, click **Call Data Cleanup**.
4. Click **Duplicate Calls**.
5. In the **Select fields:** list, select the field or fields on which to search for duplicate information.
6. Click **Select Duplicate Calls**.

   If duplicate records are found, the Outbound Campaign Management Tool Duplicate Calls dialog box asks if you want to delete or review the duplicates.

   Important:

   Duplicates are only found on records that you selected in the Duplicate Field Search. If you didn't choose all fields, you do not see unique records.

7. Click **Review** to review the duplicate calls.

   The duplicate calls appear at the top of the table and the second (and third or more) of each group of duplicate calls is highlighted.

8. To allow duplicate calls to remain in the campaign, select the duplicate calls and click **Allow Selected Duplicates**.

   Duplicate Allowed appears in the **Duplicate Status** column for the selected duplicate calls.

9. To delete the duplicate calls, click **Delete** to retain a single copy of each record and delete the duplicate records.

Checking customer matches

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Check customer matches to determine if customers present in the call data table match or closely match a customer record in the Contact Center Multimedia database. The customer match feature indicates a close match to existing customers in the Multimedia database so the Administrator creating the outbound campaign can determine whether the information in the call data table is a new customer, for which you must create a new record, or an existing customer.

For example, if Mike Smith 091 12345 is present in the Multimedia database, and Michael Smith 091 12345 is in the call data table, when you run a customer match, the similarities are displayed to the Administrator.

If Enable Partial Match is selected, similarities between the call data table and the Multimedia database are shown based on partial matches of the telephone number. For example, if the call table contains Michael Smith 12345, and the Multimedia Database contains Mike Smith 091 12345, the partial match highlights the similarities. If Partial Match is not enabled, the entry in the call data table is considered new.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. At the bottom of the **Call Settings** tab, click the **Customer Match** tab.
4. To compare information based on a partial phone match, select the **Enable Partial Match** check box.
5. Click **Check Customer Association**.

   All calls with matching phone numbers, but differences in the other fields, are highlighted in the call data table. A check box appears in the Customer Status column of each row.
6. To resolve the conflicting information for a call, select the check box in the **Customer Status** column.
7. In the Customer Matching window, compare the Campaign Customer Details with the Existing Customer Details.
8. Select whether to add this record as a new customer, or use the existing customer information.
9. Click **OK**.
10. Review all conflicting call data.
11. Click **OK**.

Procedure job aid

Variable	Value
Partial Match	Select to compare information based on a partial phone match. Entries can be matched with entries in the Contact Center Multimedia database where the area code and international code do not match. This allows information in the Contact Center Multimedia database or the call data table to be updated.

Comparing call data with the Do Not Call list

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Compare call data with the Contact Center Multimedia Do Not Call list to ensure that you are not violating laws or making incorrect calls to numbers such as an emergency number.

Contact Center Multimedia maintains an internal Do Not Call list of numbers. This list contains numbers that Contact Center agents have dispositioned as Do Not Call after previous contacts with customers. When you import a new campaign you must check the campaign numbers against the internal Do Not Call list to remove Do Not Call numbers from the campaign.

Important:

The internal Do Not Call list is not the same as statutory registers of do not call numbers–you must check your call data against external registers before importing it to Contact Center.

If you do not run this check manually, or do not delete the highlighted calls, the calls are created in Contact Center Multimedia. However, the calls are closed immediately and the disposition code is set to Do Not Call, ensuring that the call is not presented to an agent.

Any customer number dispositioned as 'Do Not Call' is tagged as a 'Do Not Call' (DNC) number in the Contact Center Multimedia Do Not Call list. To set or clear the barred status of any required number, Agent Desktop is used to edit the phone number associated with the relevant customer record. You can use Agent Desktop to clear a number from the Do Not Call list or barred status.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. On the Call Settings page, click the **Do Not Call** tab.

4. Click **Select 'Do Not Call' Numbers**. The status of each call appears in the call data table, and any calls with the status Call Not Permitted is highlighted.
5. Review the highlighted calls and, if desired, delete them from the call data table.

Assigning skillsets to outbound campaign calls

Before you begin

- Define campaign settings. See Defining campaign settings on page 297.
- Ensure that you have data in the Call Data table.

About this task

Assign skillsets to outbound campaign calls to determine which groups of agents work on the campaign. You create the assignment based on the value of a field you specify from the outbound call data.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Call Settings** tab.
3. On the Call Settings page, click the **Skillset Assignment** tab.
4. From the **Attach This Skillset To Rows** list, select a skillset to which you want to assign calls in this campaign.
5. From the **..This Field Is..** list, select the field that you want to use as a criterion for assigning a campaign call to the skillset.
6. In the **..To..** field, enter the value that you want to a campaign call to match in the specified field to assign it to the skillset.
7. Click **Update**.
8. Click **Continue**.
9. Click **OK**.

Printing a summary of a new campaign

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Complete the outbound campaign.

About this task

Print a summary of a new campaign when you are finished defining the campaign settings to record all of the settings for the current campaign.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Campaign Activation** tab.
3. Click **Print Campaign Summary**.

Activating a campaign

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Complete configuring the outbound campaign.

About this task

Activate a campaign to load the call data and campaign settings into the Contact Center Multimedia database so that the campaign is ready to begin on the date selected.

You cannot activate a campaign until it is validated by the Outbound Campaign Manager Tool.

Procedure

1. On the Outbound Campaign Manager Tool, click **Create & Append**.
2. Click the **Campaign Activation** tab.
3. Click **Create Campaign**.

   A message confirms that the campaign was created successfully.
4. Click **OK**.

Procedure job aid

The Outbound Campaign Manager Tool performs a validation on the Call Data table. The Call Data must meet the following requirements:

- The campaign size cannot exceed 20 000 contacts.
- Any customer can receive only one call per campaign.
- Duplicate customers based on an exact email match or exact first name and last name and phone number (international code, area code, and phone number) are not permitted.
- The mandatory phone number field must contain only numeric values and spaces, and cannot exceed 32 characters.

- The area code must contain only numeric values and spaces, and can not exceed 10 characters.
- The international code field must contain only numeric values and spaces, and cannot exceed 10 characters.
- The first name field cannot exceed 50 characters.
- The last name field cannot exceed 100 characters.
- If an email address field is included, an @ symbol is required, and the address cannot exceed 128 characters.
- All other Call Data table fields cannot exceed 128 characters.

Adding call data to an existing campaign

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Understand how to add call data manually, or import call data from an external source.
- Understand how to edit the call data in your outbound campaign.
- Understand how to activate the campaign. See Activating a campaign on page 319.

About this task

Add call data to an existing campaign to add new customers to a campaign already in progress.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. On the **Campaign Settings** tab, click **Append Calls to Existing Campaign**.
3. In the **Existing Campaigns** box, select the campaign from the list.
4. Click **OK**.
5. On the **Call Settings** tab, add or import the call data.
6. Edit the new call data in your campaign.
7. Activate the changed campaign.

Changing campaign settings

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

- Understand how to add call data manually, or import call data from an external source.
- Understand how to edit the call data in your outbound campaign.
- Understand how to activate the campaign. See Activating a campaign on page 319.

About this task

Change campaign settings such as the start and end date and time, the daily start and end times, the dialer settings, the agent script, and disposition codes to modify an existing campaign.

You cannot change other settings in the campaign, such as agent skillset.

If the campaign has already started, you cannot change the start date and time or the agent script.

Procedure

1. On the Outbound Campaign Manager Tool, click **Modify Campaign**.
2. In the **Campaign List** box, select the campaign to modify.
3. To change date and time information for the campaign, click the **Date/Time Settings** tab, and then select the new campaign start date and time, the new campaign end date and time, or the new daily start and end time.
4. Click **Modify Date/Time Settings** to save changes
5. To change the dialer settings for the campaign, click the **Dialer Settings** tab, and then specify the new dialer mode setting and the new dialer miscellaneous settings.
6. Click **Modify Dialer Settings** to save changes
7. To change the Agent Script for a campaign, click the **Agent Script** tab, and then specify the new agent script.
8. Click **Apply Selected Agent Script** to save any changes.
9. To change the disposition codes for a campaign, click the **Disposition Codes** tab, and then select the additional disposition codes, and clear check boxes beside the disposition codes you do not want.
10. Click **Apply Selected Disposition Codes** to save any changes.

Pausing a campaign

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Ensure that your outbound campaign is running.

About this task

Pause a campaign to stop the current outbound campaign. This action changes the state of the contacts in the selected campaign in the Contact Center Manager Server and in the Contact Center Multimedia database to waiting.

Procedure

1. On the Outbound Campaign Management Tool, click **Modify Campaign**.
2. In the **Campaign List** box, select the campaign you want to pause.
3. Click the **Campaign Status** tab.
4. Click **Pause Campaign**.
5. Click **OK** to confirm the pausing of the campaign.

Canceling a campaign

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Ensure that you have an outbound campaign configured.

About this task

Cancel a campaign to permanently stop routing the outbound calls from the campaign. By canceling a campaign, you delete the contacts in the selected campaign from the Contact Center Manager Server. Their status is set to Closed in the Contact Center Multimedia database, and the contacts are assigned the disposition code of Campaign cancelled.

Procedure

1. On the Outbound Campaign Management Tool, click **Modify Status**.
2. In the **Campaign List** box, select the campaign you want to cancel.
3. Click the **Campaign Status** tab.
4. Click **Cancel Campaign**.
5. Click **OK** to confirm the cancellation of the campaign.

Restarting a campaign

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

About this task

Restart a campaign that you paused or cancelled to continue routing outbound calls to customers.

Procedure

1. On the Outbound Campaign Management Tool, click **Modify Campaign**.
2. In the **Campaign List** box, select the campaign you want to restart.
3. Click the **Campaign Status** tab.
4. Click **Restart Campaign**.
5. Click **OK** to confirm the restarting of the campaign.

Monitoring campaign progress and results

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Ensure that an outbound campaign is running, or complete.

About this task

Monitor and outbound campaign progress and results to see how the outbound campaign is progressing, and the types of responses your agents are receiving. You can monitor the progress and results of any campaign. Both summary and detailed information are available for each campaign.

Procedure

1. On the Outbound Campaign Management Tool toolbar, click **Progress & Results**.
2. In the **Select Campaign** box, select the campaign you want to monitor.

   A summary of the campaign settings and progress appears in the Campaign Summary box.
3. To view a summary of the contact status for all contacts in the selected campaign, click the **Call Status Chart** tab.
4. To view a summary of the disposition codes for all closed contacts in the selected campaign, click the **Disposition Codes Chart** tab.
5. To view detailed information for each call in the campaign showing status of each call, as well as the customer information defined during the campaign setup, click the **Call Details** tab.
6. To view the history of status changes for the campaign, click the **Campaign History** tab.
7. To change the display in the Call Status Chart and Disposition Codes Chart tabs from a pie chart to a bar chart, or vice versa, click **Display Pie Chart** or click **Display Bar Chart**.
8. To refresh the data displayed in this window, click **Refresh**.

Printing a summary of an existing campaign

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Ensure that the outbound campaign is complete.

About this task

Print a summary of an existing campaign to review the settings and results of the completed campaign in printed format.

Procedure

1. In the Outbound Campaign Management Tool, click **Progress & Results**.
2. In the **Campaign List** box, select the campaign you want to print.

   A summary of the campaign settings and progress appears in the Campaign Summary box.
3. Click the **Print Campaign Details** button.

Creating a new agent script

Before you begin

- Prepare between one and 40 questions for the agent script, an introduction and a conclusion.
- Prepare the possible answers for the agent if you want specific wording in a response from the customer.
- Log on to Contact Center Manager Administration.
- Open the Outbound component.

About this task

Create a new agent script that contains the introductory and concluding text the agent reads, as well as a maximum of 40 questions the agent can ask the customer. The campaign administrator can customize the script by specifying default and possible allowed answers to questions.

You cannot change an agent script after you save it. Avaya recommends that you click Preview Script, and carefully review the script before saving it.

To save the agent script results for a campaign, you must create a disposition code with the save agent script option set to Yes.

Procedure

1. In the Outbound Campaign Management Tool, click **Agent Script**.
2. Click **Configure New Agent Script**.
3. In the **Introduction** box, type the text the agent reads to begin the call.

4. In the **Conclusion** box, type the text the agent reads at the end of the call.
5. Under **Agent Script Questions**, in the **Question** box, type the first question.
6. If you want to specify the possible answers to the question, in the **Allowed Answers** box, type the answers, separated by a comma; otherwise, leave this box blank.
7. In the **GUI Component** box, select a format for the agent to record the response.
8. If you want the agent to see a default answer to a question, in the **Default Answer** box, type the appropriate response.
9. If the response requires a text box, for example, for name or address, then in the **Allow Free Text** box, click the check box.
10. Create additional questions.
11. Click **Preview Script**.

    The format of the script questions is validated. If errors are found, the incorrect questions are highlighted.
12. If errors are found, correct the errors, then click **Preview Script** again.
13. In the **Save Agent Script** box, type a name, and then click **Save Script**.

Variable definitions

Name	Description
Agent Script name	The name of the agent script. The agent script name must be unique.
Allow free text	A text box that allows an agent to type responses that cannot be recorded using a GUI component. You must have a text box if there is no other user interface component. You can also include a text box with a combo box or radio buttons. The text box allows the agent to enter addition information.
Allowed Answers	The possible answers an agent can enter based on the customer's answers to each question. Each answer must be separated by a comma. You can leave this box blank and allow any answers. The maximum number of allowed answers is 32.
Conclusion	The text that an agent reads to conclude the outbound call. A conclusion is a mandatory part of the agent script and cannot exceed 1024 characters.
Default answer	The answer automatically selected in the agent script. The default answer must exist in the allowed answers for a question in the agent script.

Name	Description
GUI component	If you specify allowed answers, you must also specify how the agent selects the answers. You can use one of the following: • Combo box (list) • Radio buttons • Check boxes • Check box list • Text box If you select a GUI component, you must ensure there is at least one allowed answer.
Introduction	The text that an agent reads to begin the outbound call. An introduction is a mandatory part of the agent script and cannot exceed 1024 characters.
Question	The text that an agent asks the caller in an outbound call. Between one and 40 questions can be included in a script. Each question cannot exceed 1024 characters.

Creating an agent script from an existing script

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Prepare between one and 40 questions for the agent script, an introduction and a conclusion.
- Prepare the possible answers for the agent if you want specific wording in a response from the customer.

About this task

Create agent script from an existing script to copy details from another script to a new campaign and modify them.

You cannot make changes to an agent script after it has been saved.

Procedure

1. On the Outbound Campaign Management Tool, click **Agent Script**.
2. Click **Create from Existing Agent Script**.
3. In the **Existing Agent Scripts** box, from the list, select the script.
4. Change the introduction, questions, or conclusion as required.
5. Change or add questions as required.

Comments? infodev@avaya.com

6. To delete a question (or questions) from the script, select the row (or rows) containing the question you want to delete, and then click **Delete Selected Question**.

   To delete more than one question at a time, press the **CTRL** key while selecting the rows that contain the questions you want to delete.

7. To preview the script as the agent sees it, click **Preview Script**.

   The format of the script questions is validated. If errors are found, the incorrect questions are highlighted.

8. If errors are found, correct the errors, and then click **Preview Script** again.
9. To save the script, type a new name in the **Save Agent Script** box, and then click **Save Script**.

Adding a disposition code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

About this task

Add a disposition code to an outbound campaign to provide a mechanism for agents to record the status of an outbound call. You can view the disposition code status for each campaign.

Nine standard disposition codes are provided, but you can add more disposition codes. You can configure a maximum of 40 disposition codes.

Procedure

1. On the Outbound Campaign Management Tool, click **Disposition Codes**.
2. Click **Insert**.
3. In the **Insert Disposition Code** dialog box, in the **Disposition Code Name** box, type a descriptive name.
4. In the **Retry Timeout** box, type the length of time in minutes after which the contact is presented again to an agent.
5. If you do not want a retry call made, leave this field blank.
6. In the **Max Number of Retries** box, type the number of times a contact is presented after the initial offering to an agent.
7. To configure whether the agent script is saved on contact closure, Select **Yes** or **No**.
8. To configure whether a voice call is required to complete the contact, select **Yes** or **No**.
9. Click **Insert**.

Variable definitions

Name	Description
Disposition Code Name	The name of the disposition code. The name reflects the purpose of the closing of the outbound contact. Nine standard disposition codes are provided: • Number Busy • No Answer • Answer Machine • No such number • Hung up! • Wrong Number • Do Not Call • Re-schedule Call • Completed
Retry Timeout	The length of time in minutes after which the contact is presented again to an agent. If you create a disposition code that indicates the call was not completed, such as Re-schedule call, you can configure the amount of time before the contact is presented again to an agent. Only appropriate disposition codes, such as Number Busy, include a retry timeout.
Maximum number of retries	The number of times a contact is presented to an agent. If you create a disposition code that indicates the call was not completed, such as Re-schedule call, you can configure the maximum number of times to retry the call.
Save Agent Script	Click yes to save the agent script results for a campaign along with the disposition code. Instruct your agents to use the disposition codes that save the agent script answers when the contact is closed. If you sell a product, create a disposition code, Sale Made, with the Save Agent Script option Yes, to save the customer answers for future marketing.
Voice Call Required	Click yes if a voice call is required to complete the contact.

Name	Description
	If an agent cannot speak the same language as a customer, the agent can select a disposition code that does not require a voice call to be made.

Updating a disposition code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Create a disposition code. See Adding a disposition code on page 327.

About this task

Update a disposition code to change the properties of the code the agent uses to record the outcome of an outbound call.

Procedure

1. On the Outbound Campaign Management Tool, click **Disposition Codes**.
2. In the table, click the disposition code you want to update.
3. Click **Update**.
4. In the **Update Disposition Code** dialog box, change the **Name**, **Retry Timeout** and/or **Max Number of Retries** as required.
5. Click **Update**.

Deleting a disposition code

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Ensure that the disposition code is not used in a campaign. If it is, you must first archive or purge the campaign from the Multimedia database using the Contact Center Multimedia Administration Archive utility.
- Ensure that the disposition code that you want to delete is not one of the nine standard disposition codes—Number Busy, No Answer, Answer Machine, No Such Number, Hung Up!, Wrong Number, Do Not Call, Re-schedule Call, or Completed.

About this task

Delete a disposition code only if no campaign uses that disposition code.

Procedure

1. On the Outbound Campaign Management Tool, click **Disposition Codes**.
2. In the table, click the disposition code to delete.
3. Click **Delete**.
4. Click **OK** to confirm the deletion.

Closing a contact with a disposition code

About this task

You can close one or more campaign contacts when a campaign is running, and can apply a disposition code to the closed contacts.

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- Ensure that your outbound campaign is running.

Procedure

1. On the Outbound Campaign Manager Tool, click **Progress & Results**.
2. Under Campaign List, select the campaign containing the contacts you want to close.
3. Click the **Call Details** tab.
4. From the list, select the call that you want to close.

   To select multiple calls, press the **Ctrl** key while you select each call.
5. Right-click on the selected calls and select **Close With Code**.

   The **Select Disposition Code** drop-down list appears.
6. From the drop-down list, select the disposition code and click **OK**.

   OCMT closes the selected calls and applies the selected disposition code.

   Important:

   System disposition codes configured with Max Number of Retries do not close a call until OCMT attempts all retries, and OCMT excludes these disposition codes from the drop-down list. OCMT also excludes user-defined disposition codes configured with Max Number of Retries from the drop-down list.

Comments? infodev@avaya.com

Including UTF-8 characters in exported data

About this task

If you want to export outbound campaign data or campaign summary information that contains UTF-8 characters such as Chinese or Japanese characters, you must perform the following steps to include the characters from the Chinese or Japanese operating systems to successfully display the characters in the exported data.

Procedure

1. On the Contact Center server, locate the **OCMT appsetting.xml** file.
2. Add the following line to the text file within `<appsetting>` and `</appsetting>`:

   ```
   <EnableFileEncodingConfig>true</EnableFileEncodingConfig>
   ```

Exporting campaign call data

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- If you work on a Chinese or Japanese operating system, include the UTF-8 characters in the configuration file. See Including UTF-8 characters in exported data on page 331.

About this task

You can export either the campaign summary or all the call data, including the call status, to an external file.

Procedure

1. On the Outbound Campaign Management Tool, select **Progress & Results**.
2. In the **Select Campaign** box, select the campaign to export.
3. Click **Export Call Data**.
4. In the Outbound Campaign Management Tool Export Wizard, select the **Campaign Call Data** option.
5. Click **Next**.
6. In the Select Calls to Export window, to export all calls in a campaign, select the **All Calls** option (This is the default option).
7. To select a specific call range, select the **Select Call Range** option, and then enter the start and end call records into the boxes provided.
8. To filter all calls in a campaign by disposition code, select the **Filter Calls by Disposition Code** option, and then click the check boxes beside the desired disposition codes.

   Only the calls that match the selected disposition codes are selected.

9. Click **Next**.
10. In the Select Call Details window, in the C**all Details Fields** box, select the check box for each field of data to export.
11. To select multiple fields, click **Check All**, and then click to clear the boxes for fields you do not want to export.
12. To clear all check boxes, click **Uncheck All**.
13. To change the order of fields, click on the field name to highlight the row, and then click the up or down arrow.
14. To select how the fields is separated in the exported file, click **Tab**, **Space**, or **Character**.

    The default character is a comma. To change this character, type the desired character in the text box.
15. If you want the first row of the exported file to include the column headers, click the check box.
16. Click **Next**.
17. In the Preview Data window, click **Next**.
18. In the Select File window, click **Browse** to navigate to directory where you want to save the exported data.
19. Type the name for your exported data file, and then click **Save**.
20. In the Export Wizard, click **Finish**.

Exporting manually entered call data

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- If you work on a Chinese or Japanese operating system, include the UTF-8 characters in the configuration file. See Including UTF-8 characters in exported data on page 331.

About this task

If you enter data manually, you can export it to an external file to re-import to future campaigns, create databases, or share the Call Data table entries with a different department or application.

Procedure

1. On the Outbound Campaign Management Tool, click **Create & Append**.
2. Click the **Campaign Settings** tab.
3. Click **Append Calls to Existing Campaign** or **Start Configuring New Campaign**.
4. Verify or enter the campaign settings.

5. Click **Call Settings**.
6. Manually enter additional call data in the **Call Data Table** rows.
7. Select the rows of the Call Data Table that you want to export. To select all the data, click **Check All**.
8. Click **Export Checked Calls**.
9. On the **Call Details** dialog box, in the **Call Details Fields** box, click the check box beside each field of data you want to export.

   If you are selecting many fields, click **Check All** to check each box, then click to clear the boxes for fields you do not want to export.
10. Click **Uncheck All** to clear all check boxes.
11. To change the order of fields, click the field name to highlight the row, and then click the up or down arrow.
12. To select how the fields are separated in the exported file, click **Tab**, **Space**, or **Character**. The default character is a comma. To change this character, type the desired character in the text box.
13. If you want the first row of the exported file to include the column headers, click the **First row shall contain column headers** check box.
14. Click **Next**.
15. In the **Preview** window, click **Next**.
16. In the **Select File** window, click **Browse** to navigate to directory where you want to save the exported data.
17. Type the name for your exported data file, and then click **Save**.
18. In the Export Wizard, click **Finish**.

Exporting campaign summary data

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.
- If you work on a Chinese or Japanese operating system, include the UTF-8 characters in the configuration file. See Including UTF-8 characters in exported data on page 331.

About this task

Export campaign summary data such as all calls, a specific call range, or all calls in a campaign with a certain disposition code, so that you can use the information in another outbound campaign.

Procedure

1. On the Outbound Campaign Management Tool, select **Progress & Results**.

2. In the **Select Campaign** box, select the campaign to export.
3. Click **Export Call Data**.
4. In the Outbound Campaign Management Tool Export Wizard, select **Campaign Summary**.
5. Click **Next**.
6. In the Select Campaign Summary Data window, in the **Campaign Summary Data** box, select the check box for each field of data to export.

   To select multiple fields, click **Check All**, and then click to clear the boxes of fields you do not want to export.
7. To clear all boxes, click **Uncheck All**.
8. To change the order of fields click on the field name to highlight the row, and then click the up or down arrow.
9. Click **Next**.
10. In the Preview Data window, click **Next**.
11. In the Select File window, click **Browse** to navigate to directory where you want to save the exported data.
12. Type the name for your exported data file, and then click **Save**.
13. In the Export Wizard, click **Finish**.

Viewing log files

Before you begin

- Log on to Contact Center Manager Administration.
- Open the Outbound component.

About this task

You can open the OCMT log file to view action, warning and error log messages.

You can view the location of the current log file in the **Log file name** field. You cannot select the location of the log files in the **Log file name** field. You can select the location of the log files in the Contact Center Trace Control application. You can also view the logging level of the log files in the **Maximum log file size** field, the maximum log file size of the log files in the **Maximum log file size** field, and the number of backup log files that the system must create in the **Number of backup log files** field.

Note:

The **Log file name**, **Maximum log file size**, **Maximum log file size** and **Number of backup log files** fields are read-only.

Comments? infodev@avaya.com

Procedure

1. On the OCMT toolbar, click **General Settings**.
2. Click the **OCMT Client Logging** tab.
3. Click **View**.

   The system opens the OCMT log file, and you can view the log messages.

Chapter 52: Emergency Help

Use Emergency Help to monitor whether the agents configured on the Contact Center server require your assistance. You can keep the display open on your desktop, or you can minimize the display to continue working in Contact Center Manager Administration. When an agent presses the Emergency key, the minimized Emergency Help display automatically opens on your desktop.

For each agent who presses the Emergency key, one line of data appears in the Emergency Help display. The display shows information about the agent, including the agent's name, location, and time when the agent pressed the Emergency key.

Agents can press the Emergency key when they require assistance from the supervisor, for example, if the caller is abusive.

Starting the Emergency Help display

About this task

Start the Emergency Help display to monitor whether the agents configured on the Contact Center server require your assistance. You can keep the display open on your desktop, or you can minimize the display to continue working in Contact Center Manager Administration. When an agent presses the Emergency key, the minimized Emergency Help display automatically opens on your desktop.

Procedure

1. Log on to Contact Center Manager Administration.
2. On the Launchpad, click **Emergency Help**.
3. In the left pane, select the **CC** server.

   The Emergency Help display appears.

Printing an Emergency Help display

Before you begin

- Log on to Contact Center Manager Administration Emergency Help.

About this task

Complete this procedure to print an Emergency Help display.

Procedure

In the **Emergency Help** display, click **Print**.

Exporting an Emergency Help display

Before you begin

- Log on to Contact Center Manager Administration Emergency Help.

About this task

You can export a snapshot of an Emergency Help display to the application server for future reference. The system saves the snapshot data as HTML files with a name containing your user name, a prefix relating to the type of display that you are exporting, and the date and time when you exported the data.

Procedure

1. In the **Emergency Help** display, click **Export**.

   A message box appears, informing you of the HTML file name that you exported.

2. To view the exported display, click **View**.

Viewing an exported Emergency Help display

Before you begin

- Log on to Contact Center Manager Administration Emergency Help.

About this task

View an exported Emergency Help display to view a snapshot of an Emergency Help display that you exported as an HTML file to the Contact Center Manager Administration server.

Procedure

1. In the **Emergency Help** display, on the menu, choose **Displays** > **Manage Exported Displays**.
2. On the Exported Displays dialog box, from the list of HTML files, click the file to view.

   The snapshot of the Emergency Help display appears in a new Internet Explorer window.

Deleting an exported Emergency Help display

Before you begin

- Log on to Contact Center Manager Administration Emergency Help.

About this task

You can delete from the Contact Center Manager Administration server Emergency Help displays that you exported as HTML files.

Procedure

1. On the menu, choose **Displays** > **Manage Exported Displays**.
2. In the **Exported Displays** section, from the list of HTML files, select the check box for each file to delete.
3. Click **Delete** to remove the selected files from the Contact Center Manager Administration server.

Appendix A: Default sample data

This section lists the default sample data available in Contact Center Manager Administration after you log on for the first time. It also provides user account and password details for logging on to and using Contact Center Manager Administration.

Note:

The values for the sample supervisors, agents, and CDN are configurable. You configure these values using the Ignition Wizard. This appendix lists the default values for the sample supervisors, agents, and CDN.

Default user accounts

Account name	Password	Description
Administrator	Administrator	Default Contact Center Manager Administration administrator user.
reporting1	reporting1	A default Contact Center Manager Administration supervisor user.
reporting2	reporting2	A default Contact Center Manager Administration supervisor user.
accssync	accssync	The account IP Office uses to synchronize agent and supervisor details from Avaya Contact Center Select. **Important:** You can change the password of this account. If you change the password, you must ensure that you change the corresponding password for this account on IP Office.

Sample supervisors and agents

Login ID	Last Name	First Name	Supervisor	Assigned to skillset
6001	supervisor	sample1	supervisor sample1 (6001)	• Skill1 • Skill2 • EM_Skill1 • FX_Skill1 • OB_Skill1

Login ID	Last Name	First Name	Supervisor	Assigned to skillset
				• SD_Skill1 • SM_Skill1 • VM_Skill1 • WC_Skill1
6002	agent1	sample1	supervisor sample1 (6001)	• Skill1
6003	agent2	sample2	supervisor sample1 (6001)	• Skill1
6004	agent3	sample3	supervisor sample1 (6001)	• Skill1
6005	agent4	sample4	supervisor sample1 (6001)	• Skill1
6006	agent5	sample5	supervisor sample1 (6001)	• Skill1
6007	supervisor	sample2	supervisor sample2 (6007)	• Skill1 • Skill2
6008	agent6	sample6	supervisor sample2 (6007)	• Skill1
6009	agent7	sample7	supervisor sample2 (6007)	• Skill1
6010	agent8	sample8	supervisor sample2 (6007)	• Skill1

Sample Activity Codes

Name	Number	Display Name	Type
Bathroom	8702	Bathroom	Not Ready Reason
Breakfast	8701	Breakfast	Not Ready Reason
CCNotReady	8799	CCNotReady	Not Ready Reason
Default_ACW	00000	Default_ACW	After Call Work Item
Lunch	8700	Lunch	Not Ready Reason
Work	8500	Work	Activity Code

Sample Call Presentation Classes

Name	Presentation Option
Call_Centre_Administrator	Return To Queue
Contact_Force	Call Force Delay
Agent_Accept	Return To Queue

Sample CDNs

Name	Number	Call Type
SampleCDN	3000	Local
Multichannel	-	Open Queue Local

Default Contact Types

Name	Default Skillset
Voice	Skill1
EMail	EM_Skill1
Web_Communications	WC_Skill1
Outbound	OB_Skill1
Scanned_Document	SD_Skill1
Fax	FX_Skill1
SMS	SM_Skill1
Voice_Mail	VM_Skill1

Sample Multiplicity Presentation Classes

Name	Asssigned Contact Types
Voice_Email	• Voice • EMail
Voice_Email_Web	• Voice • Email • Web_Communications

Sample Skillsets

Skillset name (including prefix)	Contact Type	Default activity code
Skill1	Voice	8799, CCNotReady
Skill2	Voice	8799, CCNotReady
EM_Skill1	Email	8799, CCNotReady
WC_Skill1	Web_Communications	8799, CCNotReady
OB_Skill1	Outbound	8799, CCNotReady
SD_Skill1	Scanned_Document	8799, CCNotReady
FX_Skill1	Fax	8799, CCNotReady
SM_Skill1	SMS	8799, CCNotReady
VM_Skill1	Voice_Mail	8799, CCNotReady

Sample Threshold Classes

Name	Type	Threshold enabled by default
agent	Agent	• Idle • Break • Not Ready
skillset	Skillset	• Calls Waiting • Calls Answered • Agent Not Ready • Service Level Threshold
applications	Application	• %Service_Level • %Calls_Abandoned • Calls Waiting • Service Level Threshold

Sample prompts

Prompt name	Content Group	Prompt transcript	Orchestration Designer flow using this prompt
Welcome_CS	Avaya MS locale name (for example, en_us)	“Welcome to the Contact Center.”	Customer_Service
Menu_Selection_CS	Avaya MS locale name (for example, en_us)	• “Press 1 to speak to an agent at the help desk. • Press 2 to speak to an agent in the support center. • Press 3 to Enter your Pin Number or any 8 Digits of your choosing. • Press 4 to leave a voice mail. • Press * to repeat this menu.”	Customer_Service
Voicemail_CS	Avaya MS locale name (for example, en_us)	“Please wait while we direct you to our voice messaging system mailbox.”	Customer_Service
EnterDigits_CD	Avaya MS locale name (for example, en_us)	“Please enter your pin number or digits up to a maximum of 8 digits followed by the # key.”	Collect_Digits

Prompt name	Content Group	Prompt transcript	Orchestration Designer flow using this prompt
ConfirmDigits_CD	Avaya MS locale name (for example, en_us)	“The digits you entered were ...”	Collect_Digits
ValidateDigits_CD	Avaya MS locale name (for example, en_us)	“If that is correct press 1 followed by the # key or press 2 if you wish to retry followed by the # key.”	Collect_Digits
InvalidEntry_CS	Avaya MS locale name (for example, en_us)	“That is an invalid entry please try again.”	Customer_Service
NoData_Entry_CS	Avaya MS locale name (for example, en_us)	“You have not entered any data Please try again.”	Customer_Service
Emergency_CS	Avaya MS locale name (for example, en_us)	“The contact center is now in emergency mode and closed. We will reopen shortly.”	Customer_Service
OutOfHours_CS	Avaya MS locale name (for example, en_us)	“The contact center is now closed as it is out of hours.”	Customer_Service
Holidays_CS	Avaya MS locale name (for example, en_us)	“The contact center is now closed for holidays.”	Customer_Service
OutOfService_CS	Avaya MS locale name (for example, en_us)	“All departments are out of service at this time. Please call back at a later time.”	Customer_Service
PromptSubmenu_CS	Avaya MS locale name (for example, en_us)	“Press 0 to speak to an agent, Press 1 to leave a voice mail, press, Press 9 to return to the main menu.”	Customer_Service – submenu 1 and 2
FirstRAN_CD	Avaya MS locale name (for example, en_us)	“This is the first announcement. Please wait while we try to connect you to our agents.”	Collect_Digits – Queuing Tab
SecondRAN_CD	Avaya MS locale name (for example, en_us)	“This is the second announcement. All our agents are still busy please wait.”	Collect_Digits – Iterate Queue Tab
Sample_Music1	Sample_Music	-	-
Sample_Music2	Sample_Music	-	-

Sample Routes

Name	Number
Sample_Music	511

Historical Reporting templates

The following table lists the historical reporting templates available in Avaya Contact Center Select. For more information on each of these reporting templates, see *Avaya Aura® Contact Center Performance Management Data Dictionary* (44400-117).

Report Group	Report Title
Agent Performance	Activity Code By Agent
Agent Performance	Agent Average Calls Per Hour
Agent Performance	Agent by Activity Code
Agent Performance	Agent by Application Performance
Agent Performance	Agent By Skillset Performance
Agent Performance	Agent Efficiency
Agent Performance	Agent Efficiency by Contact Type
Agent Performance	Agent Efficiency by Skillset
Agent Performance	Agent Login/Logout
Agent Performance	Agent Performance
Agent Performance	Agent Performance by Supervisor
Agent Performance	Agent DN Performance
Agent Performance	Agent Short Calls
Agent Performance	Agent Transferred/Conferenced Activity
Agent Performance	Not Ready Reason Codes By Agent
Agent Performance	Skillset By Agent Performance
Call By Call	Call By Call Statistics
Configuration	Config - Agent Properties
Configuration	Config - Agent Skillset Assignment
Configuration	Config - Logged in Agent
Configuration	Config - Skillset Properties
Contact Summary	Activity Code by Address
Contact Summary	Agent by Address
Contact Summary	Contact Duration
Contact Summary	Contact Summary
Contact Summary	Contacts By Agent
Contact Summary	Contact Duration by Agent
Contact Summary	Originator By Disposition

Report Group	Report Title
Multimedia	Contacts Closed by Reason Code
Multimedia	Contact Closed by Skillset
Multimedia	Contacts Details
Multimedia	Contacts Outstanding Detail
Multimedia	Contacts Outstanding Summary
Multimedia	Contacts Received by Skillset
Others	Application By Activity Code
Others	Application Call Treatment
Others	Application Delay before Abandon
Others	Application Delay Before Answer
Others	Application Performance
Others	CDN (Route Point) Statistics
Others	Crosstab - Skillset Performance
Others	DNIS Statistics
Others	Skillset Performance
Others	Skillset Timeline
Outbound	Campaign Call Details
Outbound	Campaign Performance
Outbound	Campaign Script Results Details
Outbound	Campaign Summary
Outbound	Script Summary

Index

A

about
    OCMT 294
    Outbound Campaign Manager Tool 294
about access and partitions 258
about access classes 259
about activity codes 93, 118
about agents view 67, 160
about assignments 177
about assignment view 177
about call presentation classes 124
about CCMA client 20
about CCMA users 283
about Configuration Tool 187
about contact center configuration 91, 104
about Contact Center management 64, 157
about contact types 99, 137
about directory numbers 111
about display thresholds 128
about DNIS 148
about emergency help 88, 336
about formulas 151
about global settings 140
about historical statistics 143
about integrated reporting 143
about management 64, 157
about media servers 155
about multiplicity 133
about outbound configuration 294
about pegging thresholds 128
about real-time statistics 145, 151
about report groups 263
about reporting agents 266
about routes 131
about skillsets 102, 107
about skillset view 174
about threshold classes 103, 128
about user-defined partitions 276
access classes 259
access classes assigning 260
access classes changes 260
access classes creating 259
access classes deleting 262
access classes viewing 261
access permissions 258
acquiring all CDNs 115
acquiring CDN 111
acquiring DNIS 148
acquiring Open Queue CDN 113
acquiring routes 131
activate an agent details window
    agent map 49, 224
activating a scheduled report
    historical reports 84, 254
activating outbound campaigns 319
activitiy codes 93, 118
activity codes changing 96, 121
activity codes configuring 94, 119
activity codes deleting 97, 122
activity code selection 109
add
    content group 195
    media prompt 195
adding
    agent elements to a filter 34, 207
    application elements to a filter 33, 206
    charts to real-time dashboard 44, 217
    graphical display 41, 214
    new column to a real-time display 56, 232
    skillset elements to a filter 33, 206
adding area codes 311
adding a time zone 301
adding call data manually 307
adding call data to existing campaign 320
adding data to existing campaigns 320
adding disposition codes 327
adding international codes 311
adding local skillsets 109
adding supervisor-agents 164
administration
    users 18
administrators creating 283
agent activities tracking 94, 119
agent adding 160
agent changing 169
agent copying 170
agent deleting 167
agent location 171
agent map
    activate an agent details window 49, 224
    activating a display 49, 223
agent multiplicity presentation classes 133
agent phone presentation 124
agents 67, 160
agent selection 108
agent statistics 145
agent supervisor assignments 166
agent-to-skillset assignment examples 178
agent-to-supervisor assignment examples 178
allowing duplicate call data 315
alphabetic characters 313
application statistics 145
applying
    custom formulas to real-time displays 28, 201
applying filters

applying filters *(continued)*
graphical displays 36, 209
applying filters to real-time displays 35, 208
applying supervisor-reporting agent combinations to real-time displays 37, 210
areas of summary chart
zooming in 63, 239
arranging agents using drag and drop
agent map 47, 222
assigned users viewing 271
assigning access classes to a user 260
assigning agents to skillsets 182
assigning agents to supervisors 183
assigning reporting agent to a user 288
assigning skillsets 318
assigning standard partitions to a user 269
assigning threshold alerts
nodal real-time display 220
assigning user-defined partitions to users 281
assignments agent to skillset examples 178
assignments agent-to-supervisor examples 178
assignments cancelling 179
assignments copying 184
assignments creating supervisor 180
assignments deleting 185
assignments for agent supervisors 166
assignments original 179
assignments running immediately 181
assignments skillset 174
assignments view 177
assignments viewing scheduled 186
assignment types 177
audit trail 24
Avaya Media Server integrated reporting 143

B

best practices
daily start and stop times 295
manage outbound capacity 296

C

calculations viewing 154
call data duplicates in outbound campaigns 315
call data exporting manually-entered 332
call list for do not call numbers 317
call presentation class creating 124
call presentation class deleting 126
call presentation classe about 124
call presentation classes multiplicity 133
campaigns activating 319
campaigns adding call data manually 307
campaigns adding data to existing 320
campaigns adding disposition codes 327
campaigns adding time zones 301
campaigns agent script 324
campaigns alphabetic characters 313
campaigns assigning skillsets 318
campaigns cancelling 322
campaigns changing settings 320
campaigns changing time zones 302
campaigns comparing call data 317
campaigns customer matches 316
campaigns defining settings for 297
campaigns deleting disposition codes 329
campaigns deleting time zone 303
campaigns duplicate call data 315
campaigns exported characters 331
campaigns exporting call data 332
campaigns exporting campaign data 331
campaigns exporting summary data 333
campaigns importing data from existing 306
campaigns importing data from ODBC database 305
campaigns importing data from text file 303
campaigns inserting text 308
campaigns international codes 311
campaigns length of fields 312
campaigns logging on 296
campaigns monitoring progress 323
campaigns partial matches 317
campaigns pausing 321
campaigns printing summary 318, 324
campaigns removing text 309
campaigns replacing text 310
campaigns restarting 322
campaigns reusing agent script 326
campaigns splitting phone numbers 311
campaigns time zone example 299
campaigns time zones 299
campaigns updating disposition codes 329
campaigns UTF-8 characters 331
campaigns validating data 308
campaigns value checking 314
cancelling 322
CCMA
sample data 19
CCMA client operation 20
CCMA logging on 22
CCMA user creating 283
CCMA user deleting 288
CCMA user properties copying 287
CCMA users 283
CCMA users and supervisor agents 290
CCMM integrated reporting 143
CDN configuring 111
CDN deacquiring 115
CDN deleting 116
CDN Open Queue configuring 113
change
chart properties in the real-time dashboard display 44, 217
color settings of a real-time display grid 58, 234
data collection mode of a real-time display 60, 236

change *(continued)*
font size in a real-time display grid 57, 233
refresh rate of a real-time display 57, 233
title of a real-time display grid 61, 237
Change Agent State 30, 64, 158, 203
changing
column names 58, 234
column width in a real-time display 59, 235
user password 22
changing access classes 260
changing activity codes 96, 121
changing agent 169
changing contact types 99, 137
changing disposition codes 329
changing file name prefix
exported real-time display 40, 213
changing formulas 154
changing settings 320
changing text in an outbound campaign 310
changing time zones 302
changing user-defined partition 281
changing user properties 272
characters in UTF-8 331
character types in outbound campaigns 313
checking alphabetic characters 313
checking customer matches 316
checking duplicate call data 315
checking length of fields 312
checking values 314
class assignments to user for access 260
closing CCMA 22
closing contacts with disposition codes
OCMT 330
codes for activities 93, 118
collecting historical statistics 143
collecting real-time statistics 145
color settings of a real-time display grid
changing 58, 234
comparing call data with DNC 317
comparting call data 317
configuration adding local skillset 109
Configuration Tool about 187
Configuration tool downloading spreadsheets 187
Configuration tool entering data 188
Configuration tool saving data 191
Configuration tool transferring data to 192
Configuration tool uploading data 190
Configuration tool validating data 189
configuring
agent map 46, 220
billboard display 50, 224
chart display 51, 225
dashboard display 43, 216
Time Line display 54, 229
configuring activity codes 94, 119
configuring CDN 111
configuring DNIS 148
configuring global settings 140
configuring historical statistics 143
configuring Internet Explorer for CCMA 20
configuring Open Queue CDN 113
configuring real-time statistics 145
configuring routes 131
connection status window 23
contact center configuration about 91, 104
Contact Center management about 64, 157
contact selection 108
contact types about 99, 137
contact types editing 99, 137
content group
add 195
controlled directory numbers about 111
copying agent properties 170
copying assignments 184
copying CCMA user properties 287
correcting data in Configuration tool spreadsheets 190
creating
private billboard collection 53, 228
private collection 52, 227
private real-time display 27, 199
public collection or public billboard collection 229
creating access classes 259
creating a filter in real-time reporting 32, 205
creating an agent script 324, 326
creating a shared or private report
historical reports 75, 245
creating CCMA user 283
creating multiplicity call presentation classes 133
creating report groups 264
creating supervisor/agents 290
creating user-defined partition 278
customer matches in outbound campaigns 316
custom formula 151
customizing
agent map layout 48, 222
display properties 56, 232

D

data collection mode of a real-time display
changing 60, 236
data correction in Configuration tool spreadsheets 190
data entering in Configuration tool spreadsheets 188
data exporting campaign 331
data exporting campaign summary data 333
data exporting outbound manual call 332
data exporting with UTF-8 characters 331
data limits for outbound campaigns 319
data saving in Configuration tool spreadsheets 191
data transferring to Configuration tool spreadsheets 192
data uploading from Configuration tool spreadsheets 190
data validation in Configuration tool spreadsheets 189
deacquiring all CDNs 116
deactivating a scheduled report

deactivating a scheduled report *(continued)*
historical reports ... 85, 255
deaquiring CDN ... 115
decrease
summary chart size ... 62, 238
default sample data ... 19, 339
default time zones ... 301
defining outbound campaign settings ... 297
defining the report output
historical reports ... 76, 246
defining thresholds ... 128
delete
private displays ... 29, 202
deleting
columns from a real-time display ... 61, 237
graphical display ... 42, 215
deleting access classes ... 262
deleting activity codes ... 97, 122
deleting a filter ... 35, 208
deleting agents ... 167
deleting a report
historical reports ... 86, 256
deleting assignments ... 185
deleting call presentation classes ... 126
deleting CCMA users ... 288
deleting CDN ... 116
deleting disposition codes ... 329
deleting emergency help display ... 90, 338
deleting multiplicity call presentation classes ... 136
deleting report groups ... 265
deleting text in an outbound campaign ... 309
deleting time zones ... 303
deleting user-defined partition ... 282
demand assignments ... 181
details for agents changes ... 169
directory numbers about ... 111
display thresholds ... 128
disposition code adding ... 327
disposition code changes ... 329
disposition code deleting ... 329
DNIS ... 148
DNIS configuring ... 148
document purpose ... 14
do not call list in outbound campaigns ... 317
downloading Configuration tool spreadsheets ... 187
duplicate call data ... 315

E

editing
server properties ... 105
editing agent details ... 67
editing a report
historical reports ... 79, 249
editing contact types ... 99, 137
editing thresholds ... 128
emergency help ... 88, 336
emergency help deleting display ... 90, 338
emergency help exporting ... 89, 337
emergency help printing ... 88, 336
emergency help starting ... 88, 336
emergency help viewing exported display ... 89, 337
ending a campaign ... 322
entering data in Configuration tool spreadsheets ... 188
example reporting agents and standard partition ... 268
examples assignment scenarios ... 178
example time zones ... 299
existing agent scripts ... 326
existing campaign imports to outbound campaign ... 306
existing campaigns, adding data ... 320
exported displays ... 39, 212
exported real-time display
changing the file name prefix ... 40, 213
exporting
real-time displays ... 39, 212
exporting an ad hoc report
historical reports ... 74, 244
exporting campaign call data ... 331
exporting data ... 331
exporting emergency help ... 89, 337
exporting manually entered call data ... 332
exporting summary call data ... 333

F

field length in outbound campaigns ... 312
filter
adding agent elements ... 34, 207
adding application elements ... 33, 206
adding skillset elements ... 33, 206
delete ... 35, 208
removing elements ... 35, 208
filter management ... 32, 205
adding agent elements to a filter ... 34, 207
applying filters to graphical displays ... 36, 209
applying filters to real-time displays ... 35, 208
applying supervisor-reporting agent combinations to real-time displays ... 37, 210
creating a filter in real-time reporting ... 32, 205
deleting a filter ... 35, 208
removing elements to a filter ... 35, 208
removing filters from a real-time display ... 38, 211
finding values in outbound campaigns ... 314
Force Agent Log out ... 30, 64, 158, 202
multiple agents ... 68, 167
single agent ... 68, 168
formula changing ... 154
formula creating ... 151
formulas ... 151

G

global switch settings ... 140
global switch settings configuration ... 140

graphical displays 41, 214
activating a display from an agent map 49, 223
adding a graphical display 41, 214
adding charts to the real-time dashboard 44, 217
arranging agents in an agent map using drag and drop 47, 222
assigning threshold alerts to a nodal real-time display 220
changing chart properties in the real-time dashboard display 44, 217
configuring a chart display 51, 225
configuring a dashboard display 43, 216
configuring an agent map 46, 220
configuring a Time Line display 54, 229
configuring billboard display 50, 224
creating a private billboard collection 53, 228
creating a private collection 52, 227
creating a public collection or public billboard collection 229
customizing agent map layout 48, 222
deleting a graphical display 42, 215
making a public copy of a graphical display 219
opening a graphical display 42, 215
removing display charts from the real-time dashboard display 45, 218
saving the real-time dashboard display 45, 218
zooming in or out on an agent map display 48, 223

H

help in emergencies 88, 336
historical reports 70, 240
activating a scheduled report 84, 254
creating a shared or private report 75, 245
deactivating a scheduled report 85, 255
defining the report output 76, 246
defining the selection criteria 73, 243
deleting a report 86, 256
editing a report 79, 249
exporting an ad hoc report 74, 244
importing a report 78, 248
log on 70, 240
opening a public, private, or shared report 71, 241
printing an ad hoc report 81, 251
printing a report schedule 84, 254
running an ad hoc report 72, 242
running a report from a different time zone 86, 256
scheduling a report 81, 251
historical statistics 143
historical statistics configuring 143

I

idle time for agent selection 108
importing a report
historical reports 78, 248
importing data from existing campaign 306
importing data from ODBC database 305
importing data from text file 303
increase
summary chart size 62, 238
inserting text 308
inserting text in an outbound campaign 308
integrated reporting 143
international codes 311
international codes in an outbound campaign 311
intervals viewing statistics 145
IP Office
synchronizing data 91, 105
IVR statistics 145

L

length of fields 312
limits for campaign data 319
local skillset adding 109
locating agents 171
locating values in outbound campaigns 314
log files 334
logging off 22
logging on 22
logging on for outbound 296
logging on to CCMA 22
log on
historical reports 70, 240
log out
force 30, 202

M

making
public copy of a private real-time display 200
making a public copy
graphical display 219
management
filter 32, 205
management about 64, 157
management adding agent 160
management adding supervisor-agents 164
management editing agent details 67
managing prompts 194
manually adding call data to outbound campaigns 307
matching customers in outbound campaigns 316
media prompt
add 195
media server
CCMA 155
Media server integrated reporting 143
media servers about 155
monitoring agent activities 94, 119
monitoring progress and results of outbound campaigns 323
monitoring updates 24
moving
chart contents within the window 62, 238

multiplicity 133
multiplicity call presentation class creating 133
multiplicity call presentation class deleting 136

N

network statistics 145
nodal statistics 145
not call list 317
number dialled configuring 148
numbers in outbound campaigns 311

O

OCMT
about 294
closing contacts with disposition codes 330
ODBC database imports to outbound campaign 305
on demand assignments 181
opening
graphical display 42, 215
opening a public, private, or shared report
historical reports 71, 241
Open Queue CDN configuring 113
original assignments 179
outbound
daily start and stop times 295
manage outbound capacity 296
Outbound Campaign Manager Tool
about 294
outbound campaigns activating 319
outbound campaigns adding call data manually 307
outbound campaigns adding data to existing 320
outbound campaigns adding disposition codes 327
outbound campaigns agent script 324
outbound campaigns alphabetic characters 313
outbound campaigns assigning skillsets 318
outbound campaigns cancelling 322
outbound campaigns changing settings 320
outbound campaigns changing time zones for 302
outbound campaigns comparing call data 317
outbound campaigns configuring time zones 301
outbound campaigns customer matches 316
outbound campaigns data limitations 319
outbound campaigns defining settings 297
outbound campaigns deleting disposition codes 329
outbound campaigns deleting time zone 303
outbound campaigns duplicate call data 315
outbound campaigns exported data 331
outbound campaigns exporting campaign data 331
outbound campaigns exporting data 332
outbound campaigns exporting summary data 333
outbound campaigns importing data from existing campaign 306
outbound campaigns importing data from ODBC database 305
outbound campaigns importing data from text file 303
outbound campaigns inserting text 308
outbound campaigns international codes 311
outbound campaigns length of fields 312
outbound campaigns logging on 296
outbound campaigns monitoring progress and results 323
outbound campaigns paritial matches 317
outbound campaigns pausing campaigns 321
outbound campaigns printing summary 318, 324
outbound campaigns removing text 309
outbound campaigns replacing text 310
outbound campaigns restarting 322
outbound campaigns reusing agent script 326
outbound campaigns splitting phone numbers 311
outbound campaigns time zone example 299
outbound campaigns time zones 299
outbound campaigns updating disposition codes 329
outbound campaigns UTF-8 characters 331
outbound campaigns validating data 308
outbound campaigns value checking 314
outbound configuration 294
out of service skillsets 107

P

partial matches 317
partitions 258, 266
partitions assigning user-defined 281
partitions changing user-defined 281
partitions creating user-defined 278
partitions deleting user-defined 282
partitions properties for users 272
partitions removing from user 274
partitions user-defined 276
partitions user-defined properties 276
partitions viewing users 271
pausing campaigns 321
pegging thresholds 128
permissions assigning 260
permissions changing 260
permissions creating 259
permissions deleting 262
permissions to access 259
permissions viewing 261
phone numbers do not call 317
phone number splitting 311
presentation class for multiplicity 133
presentation for agent's phone 124
print
real-time display 29, 201
printing an ad hoc report
historical reports 81, 251
printing a report schedule
historical reports 84, 254
printing emergency help 88, 336
printing summary of campaigns 318, 324
priority for agent selection 108
priority for contact selection 108

progress and results of outbound campaign 323
properties of agents copying 170
public report groups 263

R

real-time display 25, 197
real-time displays
applying custom formulas 28, 201
applying filters 35, 208
applying supervisor-reporting agent combinations 37, 210
removing filters 38, 211
real-time report customization
adding a new column to a real-time display 56, 232
changing column names 58, 234
changing the color settings of a real-time display grid 58, 234
changing the column width in a real-time display .59, 235
changing the data collection mode of a real-time display 60, 236
changing the font size in a real-time display grid ..57, 233
changing the refresh rate of a real-time display ... 57, 233
changing the title of a real-time display grid 61, 237
deleting columns from a real-time display 61, 237
display properties 56, 232
increasing or decreasing the summary chart size 62, 238
moving the chart contents within the window 62, 238
rearranging columns in a real-time display 60, 236
rotating a summary chart 62, 238
zooming in on areas of a summary chart 63, 239
real-time reporting 25, 197
applying custom formulas to real-time displays 28, 201
creating a private real-time display 27, 199
deleting private displays 29, 202
making a public copy of a private real-time display 200
printing a real-time display 29, 201
viewing the non-staffed skillsets 31, 204
real-time reports
customization 56, 232
real-time reports customization 56, 232
real-time statistic collection 145
real-time statistics 145, 151
real-time statistics custom formula 151
real-time statistics editing formula 154
real-time statistics viewing formula 154
rearranging
column width in a real-time display 60, 236
refreshing
server 106
related documentation 14
removing
display charts from the real-time dashboard display 45, 218
removing activity codes 97, 122
removing elements to a filter 35, 208
removing filters from a real-time display 38, 211
removing partitions from user 274
removing report groups 265
removing text 309
removing text in an outbound campaign 309
removing user-defined partition 282
repeated call data in outbound campaigns 315
replacing text 310
replacing text in an outbound campaign 310
report groups 263
report groups creating 264
report groups deleting 265
report groups public and user-defined 263
reporting agents 266
reporting agents assignments 288
reporting agents example 268
reporting agents viewing 271
reports
historical 70, 240
real-time 25, 197
restarting campaigns 322
results of outbound campaigns 323
review server status 23
roles in contact center 283
rotate
summary chart 62, 238
route point configuring 111
route point configuring Open Queue 113
route point deacquiring 115
route point deleting 116
route points about 111
routes about 131
routes configuring 131
route statistics 145
running an ad hoc report
historical reports 72, 242
running a report from a different time zone
historical reports 86, 256

S

saving
real-time dashboard display 45, 218
saving data in Configuration tool spreadsheets 191
scheduled assignments 186
scheduled assignments cancelling 179
scheduling a report
historical reports 81, 251
variable definitions table 83, 253
scripts for agents in campaigns 324, 326
search
activity code 98, 123
searching activity codes 98, 123
searching for agents 171
server
refreshing 106
server properties
editing 105

servers review status ... 23
setting change for campaigns ... 320
skillset adding ... 109
skillset assignment ... 174
skillset assignments ... 174
skillset assignment to outbound campaigns ... 318
skillsets ... 102, 107
skillsets activity codes ... 109
skillsets agent assignments ... 182
skillsets agent selection ... 108
skillsets contact selection ... 108
skillsets contact types ... 109
skillsets default activity codes ... 109
skillsets out of service ... 107
skillset statistics ... 145
splitting numbers ... 311
splitting numbers in outbound campaign ... 311
spreadsheets Configuration tool downloading ... 187
spreadsheets correcint data ... 190
spreadsheets entering data ... 188
spreadsheets for Configuration Tool ... 187
spreadsheets saving data ... 191
spreadsheets transferring data to ... 192
spreadsheets uploading data ... 190
spreadsheets validating data ... 189
standard partition example ... 268
standard partitions ... 266
standard partitions changing properties ... 272
standard partitions for users ... 269
standard users creating ... 283
start
    CCMM utility ... 24
    multimedia utility ... 24
start and stop times for outbound campaigns ... 297
starting emergency help ... 88, 336
starting outbound campaigns ... 322
statistics for historical reports ... 143
statistics for real-time reports ... 145
statistics historical collecting ... 143
summary printing in outbound campaigns ... 318, 324
supervisor/agent adding ... 164
supervisor/agents creating ... 290
supervisor assignments of agents ... 166
supervisor creating assignments ... 180
supervisors agent assignments ... 183
support ... 16
switch routes configuring ... 131
switch settings global configuration ... 140
switch settings global for system ... 140
synchronizing data
    IP Office ... 91, 105

T

text file imports to outbound campaign ... 303
threshold classes ... 103, 128
threshold classes editing ... 128
thresholds display ... 128
thresholds pegging ... 128
time zone changes ... 302
time zones ... 299
time zones example ... 299
time zones for outbound campaigns ... 301
tracking agent activities ... 94, 119
tracking updates ... 24
transferring data to Configuration tool spreadsheets ... 192
types of assignments ... 177
types of contacts ... 99, 137
types of contacts changing ... 99, 137

U

update tracking ... 24
updating disposition codes ... 329
updating prompts ... 195
uploading data in Configuration tool spreadsheets ... 190
user accounts and passwords ... 339
user assigning standard partitions to ... 269
user-defined partition changing ... 281
user-defined partition creating ... 278
user-defined partition deleting ... 282
user-defined partition properties ... 276
user-defined partitions ... 276
user-defined reports ... 263
user password
    changing ... 22
user properties copying ... 287
users ... 283
    administration ... 18
users access classes ... 260
users assigning reporting agents to ... 288
users assigning user-defined partitions to ... 281
users changing properties ... 272
users deleting ... 288
users removing partition from ... 274
UTF-8 characters ... 331

V

validating ... 308
validating data for outbound campaigns ... 308
validating data in Configuration tool spreadsheets ... 189
value in outbound campaign ... 314
videos ... 15
view
    log files ... 334
view assignments ... 177
viewing
    exported real-time display ... 39, 212
    non-staffed skillsets ... 31, 204
viewing access classes ... 261
viewing assignments ... 186
viewing emergency help display ... 89, 337
viewing formula ... 154

viewing reporting agents 271
viewing skillsets 102
viewing threshold classes 103
views agent 67, 160
views in management 64, 157

Z

zoom
    areas of summary chart 63, 239
zooming in or out
    agent map display 48, 223