Oracle® Call Center Intelligence

Implementation Guide

Release 11*i*

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Oracle Call Center Intelligence Implementation Guide, Release 11*i*

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Preface

Intended Audience

This document is intended for IT professionals who are tasked with implementing Oracle Call Center Intelligence, Release 11*i*.

Related Documents

Additional information on installing and setting up dependencies is available in the following documents:

- *Release Notes, Oracle Applications Release 11i* (Part #A83528-01)
- *Oracle Applications Release 11i Concepts* (Part #A82932-01)
- *Installing Oracle Applications Release 11i* (Part #A69409-01)
- *Oracle Applications System Administrator's Guide Release 11i*
- *Implementing Oracle CRM:ERP Functional Checklist* (available on Oracle MetaLink)

Implementing Call Center Intelligence

Purpose for Implementing

Call center directors, agent/group supervisors, campaign business managers, and others need to track and report on agent, campaign, call center, or enterprise business performance with integrated call centric and applications centric statistics.

Call Center Intelligence tracks and delivers call statistics and related business data, enabling call center managers to improve agent productivity by quickly adjusting processes and resources. By using Call Center Intelligence, you can combine call statistics with flexible historical views and analyses. Managers can spot trends to improve planning and quickly pinpoint recurring problems, which is especially important where high call volumes magnify the impact of management decisions.

Overview of Call Center Intelligence

If you can measure it, you can manage it. Use Call Center Intelligence to monitor ACD/PBX activity and capture large amounts of call detail data. You can collect statistics and generate real time and historical reports about many parameters. PBX utilization and agent productivity improve because managers get the information and analyses they need to sharpen both short-term and long-term decisions.

The value of statistical data grows along with the archived database.

Capture Business Data Associated with Calls

The Oracle solution captures CTI-enabled application data, such as products the customer discussed with the agent and the length of time the agent discussed each product. The result is that you gain a sophisticated resource with which to analyze customer behavior and spot trends, and to increase revenue by planning and implementing more effective cross-selling initiatives.

Track and Log all Calls from the Cradle to the Grave

Call Center Intelligence captures specific events within the physical infrastructure. You can track each call as a single transaction, regardless of transfers or the call's path through the enterprise. The result is that you obtain more flexible, accurate and comprehensive information on which to fine tune call center performance.

Managers get a Wealth of Statistical Data to Support Decisions

Call Center Intelligence generates summary charts of real-time and historical data. These include pre-configured charts plus a flexible, easy-to-use interface for displaying views of data customized to your needs. You make the best decisions because Call Center Intelligence gives you the best data - and the best tools to drill through that data.

Call Center Intelligence Captures, Analyzes and Displays Call Data

It's easy to configure. Provides flexible data capture and analysis.

A graphical user interface (GUI) makes it easy to tailor Call Center Intelligence to changing call center and business requirements. You can relate product and call data to track agent performance and other call center processes. Also, you gain valuable insights and can measure the effectiveness of human resource initiatives, such as hiring, training, and incentive programs.

Call Center Intelligence's End-Users

Call center directors, agents, group supervisors, campaign business managers, and others need to track and report on agent, campaign, call center, or enterprise business performance with integrated call centric and applications centric statistics.

Front-end analytical application allows you to evaluate the performance of a corporation and effectively pinpoint shortcomings in company operations. Users of analytical applications in an organization can usually be segmented into three categories, each with different needs:

Top Management

Top management personnel can view the health of the entire call center business in terms of, but not limited to, customer service and satisfaction and telesales revenue. They can monitor the call center workforce turnover and employee productivity and identify the ROI on campaigns to make effective and informed business decisions.

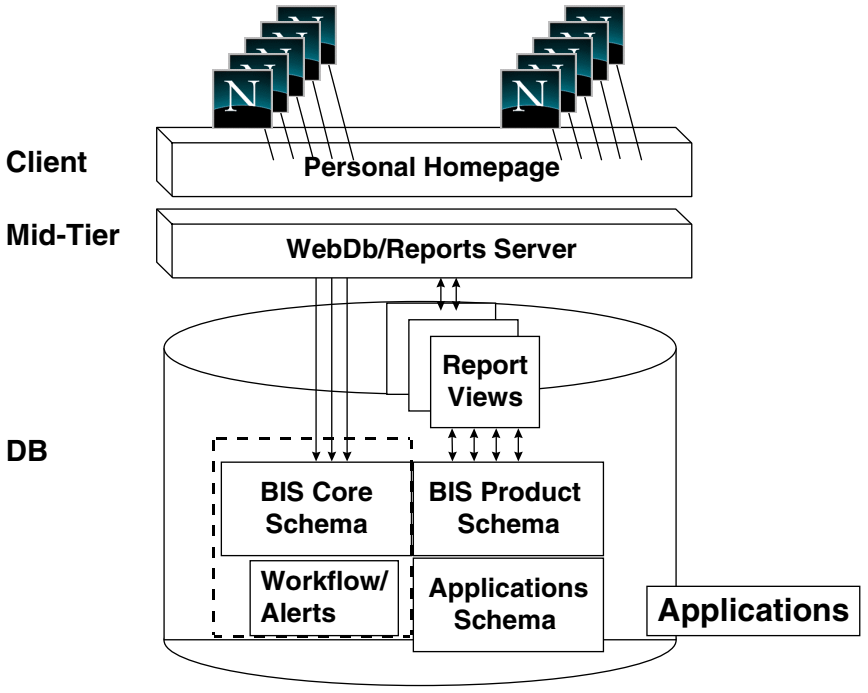
Middle Management

Middle management personnel can view the performance of their call center agents. Also, they can view specific key indicators to identify areas of improvement and analyze data at a higher level of detail.

Business Analyst

Business analyst personnel can answer specific business questions by forming business hypothesis and perform detail analysis on historical or market data. They can also conduct, "What if..." scenarios to make business analysises.

Architectural Overview of Call Center Intelligence



Summary tables aggregates the base data to hour resolution over a small number of dimensions. The following is the process that takes place:

Universal Work Queue (UWQ) sends interaction data via AQ(Advanced Queueing). One or two processing threads take the data from AQ and inserts each interaction into BIX_ INTERACTIONS.The CCI concurrent program updates up to several records in each BIX_SUM_x table.

Server data comes from the Multi-Channel Manager (MCM), Campaign Plus (CP), or Interaction Blending (IB). Since each server sends different measures and dimensions, each set of data is stored in a separate table. Once again, the submitting thread inserts each piece of data into the appropriate BIX_SERVER table and also updates several records in the appropriate BIX_SERVER_SUM_x table.

CCI clients running CCI reports will need to access up to all of the Summary tables. Most reports should only access one or two tables. Note that data in the Interaction

Summary tables will probably be off by a few minutes. A clean up process runs periodically to purge the non-summarized tables.

Business Flow for Call Center Intelligence

The following diagram depicts the flow of data between the UWQ business modules and other major business modules, including the flow of Interaction and Business data per interaction into the BIX_INTERACTIONS table to the Summary Tables, which the Call Center Intelligence reporting takes place.

As business activities get started and completed, the CRM application will notify UWQ, and UWQ keeps timing statistics on data associated with the business activities (e.g., document type and id) within the interaction.

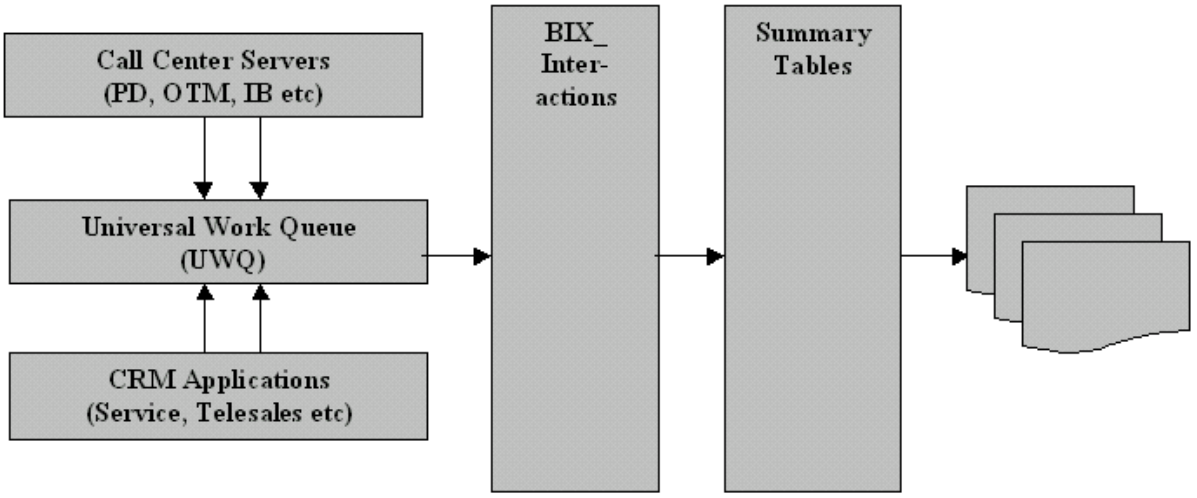
At the wrap-up of the interaction, the CRM application will notify UWQ of the outcomes of the interaction and the business activities. At the closure of the interaction, the CRM application will notify UWQ. The time statistics for the interaction, activities, media and all associated information will be written to the interaction history repository.

In addition, at the end of the interaction, business statistics will be passed from the CRM application to UWQ, which will package the business data and interaction data, and write it to the Call Center Intelligence to support reporting.

Assuming UWQ submits interaction data in individual packets, the following occurs:

- UWQ submits the Interaction data via AQ.
- The first thread takes the AQ record and converts it into an Interaction Record (IR).
- The IR is inserted into BIX_INTERACTIONS.
- IR also inserts into 3 index tables.
- The second thread processes the IR to determine the type of summary records that needs updating.
- Several records in each BIX_SUM_x table are updated. If a record doesn't exist, then it must be inserted into the appropriate summary table, which will also insert into that table's index tables.

Two threads process data in AQ. Since the Interaction tables and the Summary tables are disjointed, each thread works and commits its changes separately.



Summarized Data for Reports

The Call Center Intelligence reports are available in the Oracle CRM Business Intelligence System report on summarized data. The summarized data is created by running various concurrent programs from Oracle Applications.

To ensure your users always have up-to-date information for their reports, we suggest that you schedule the concurrent programs to run at specified intervals. Use the Oracle Applications Standard Request Submission (SRS) feature to schedule the programs. See: *Oracle Applications System Administrator Guide*

To run Call Center Intelligence Concurrent Programs, Run the concurrent program BIXSUMPB (BIX Interaction and BIXSERSB summary and server tables get populated by running this concurrent program). Consider running these two concurrent programs every hour.

To run Call Center Intelligence Concurrent Programs Individually:

1. Navigate to the Submit Requests window.
2. Choose the option Single Request.
3. Choose a concurrent program from the list of values.
4. Specify the Program Parameters as mentioned above.
5. Submit your request.

To purge BIX interaction tables, run the concurrent program BIXPURIN. Consider running the program every 48 hours.

Converting and Inputting Existing Data

If you are using OTM and want to migrate to R11i , without running other Call Center Intelligence product specific migration and/or upgrade scripts, use Call Center Intelligence.

Dependencies for Call Center Intelligence

Call Center Intelligence's dependencies relates to other products and components. Its dependencies affect the product's implementation and ongoing operations; hence, you must install and set up all of Call Center Intelligence's dependent components.

In order to implement Call Center Intelligence, you must activate its required dependencies from different libraries, modules, engines, and applications:

- CRM Foundation
- Oracle Service
- Call Center Technology
- Oracle Telesales
- Interaction Blending
- Campaign Plus
- Universal Work Queue (UWQ)

Access to Resource Manager (CRM JTF) is mandatory. The access provides you with data from Human Resource application schema, such as, but not limited to, agent specific information (e.g., Agent Name).

Call Center Intelligence depends on Oracle Universal Work Queue (UWQ), which collects data from Oracle Call Center products, such as, but not limited to, Oracle Predictive Dialing, Oracle Interaction Blending, Oracle TeleSales (OTS), Oracle Telephony Manager (OTM), and Oracle Services.

Definition of Required Dependencies

- FND - FND forms are used for concurrent programs, menus and responsibilities.
- AK - AK forms are used to enter parameters, graph titles, report column headings etc.
- BIS - BIS are integrated and can be drilled across through extensible hyper-links.
- JTF - JTF stores interaction history data
- CS - BIX uses CS to report service related transactions especially for Contact Center Activity reports.

- CCT – BIX is dependent on CCT(Telephony Manager) for through UWQ to report call related transactions
- IEB - BIX is dependent on Interaction Blending for data for the Blending related reports.
- IEC – BIX is dependent for data from Campaign Plus for the Summary reports.
- IEU – BIX is dependent for data on UWQ for mostly all reports.

List of Call Center Intelligence Dependencies

- FND – Application Object Library
- AK – Oracle Common Modules
- BIS – Oracle Applications BIS
- JTF – CRM Foundation

Shared Installed Products

- CS – Oracle Service
- CCT – Call Center Technology
- IEB - Interaction Blending
- IEC - Campaign Plus
- IEU - Universal Work Queue

Consequences for dependencies

- FND – User will not be able to use FND forms for concurrent programs, menus, and responsibilities
- AK – All meta data and parameters will fail
- BIS – PMF and graph will fail
- JTF – Parameter, buttons, and icons will fail
- CS – BIX will miss all contact center activity information and will fail to calculate key measures such as calls placed , wrap time, and idle time
- CCT – BIX depends on CCT to report all call related transactions.
- IEB – BIX depends on data from Interaction Blending for all the Service Level, reports to work.
- IEU – BIX is dependent on UWQ for all data

Resolution for Consequences pertaining to Dependencies

- FND – FND should be properly installed and set up
- AK – should be properly installed and set up
- BIS – All BIS modules should be properly installed and set up
- JTF – should be properly installed and set up
- CS- should be properly installed and set up (Contact Center Activity)
- CCT – should be properly installed and set up (Call related transaction)
- IEU – should be properly installed and set up
- IEB – should be properly installed and set up

The following is a table of Call Center Intelligence's report dependencies:

Report Name	Report Rdf File Name	OLTP	Concurrent Processes	OLTP Tables	Sum-mary Tables	Views	KPIs	Alerts	Work-flow	Key Parameters
Abandon Call Rate	BIXACAB1	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v, jtf_rs_ groups_ vl	abandon call rate	bix_ alert.bix_ abandon_alert	bixpmf.wft	start date,end date,wait range
Abandon Call Rate - Time Series	BIXAABTO	OTM,UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v, jtf_rs_ groups_ vl				start date,end date,wait range
Calls Answered vs Abandoned Calls	BIXANABO	OTM,UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v, jtf_rs_ groups_ vl	BIX Calls Answered	bix_ alert.bix_ callsans_alert	bixpmf.wft	start date,end date,wait range
Wait to abandon by Wait range	BIXWABRO	OTM,UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_ interactions				start date,end date,wait range
Wait to abandon by center	BIXWABCO	OTM,UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_ v,,jtf_rs_ groups_ vl	BIX Average wait Time Abandon	bix_ alert.bix_ avgwait_alert	bixpmf.wft	start date,end date,resource group
All Call Activity	BIXAACTO	OTM, UWQ,	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v, jtf_rs_ groups_ vl				start dste, end date, resource group, agent
Average Agent Transaction Time	BIXAATRO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v, jtf_rs_ groups_ vl				start date, end date , center
Average caller Transaction Time	BIXATCRO	OTM,UWQ,	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ agt_cls	bix_call_ center_v, jtf_rs_ groups_ vl				start date, end date , center
Transferred Call Rate versus goal	BIXTFRRO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v				start date ,end date, center
Availability Rate	BIXAVALO	OTM,UWQ,	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v, bix_int_ classifications_v				start date ,end date, center, classification

Report Name	Report Rdf File Name	OLTP	Concurrent Processes	OLTP Tables	Sum-mary Tables	Views	KPIs	Alerts	Work-flow	Key Parameters
Occupancy Rate vs Goal	BIXOCCGO	OTM, UWQ,	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v, bix_int_ classifications_v				start date, end date , center, classification
Ocuupancy Rate - comparison	BIXOCCMO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v	BIX Occupancy Rate measurement	bix_ alert.bix_ occrate_alert	bixpmf.wft	start date , end date, center
Utilization Rate vs goal	BIXUTLGO	OTM,UWQ,	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v, bix_int_ classifications_v				start date, end date , center, classification
Utilization Rate - comparison	BIXUTLMO	OTM,UWQ,	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v	BIX Utilization rate	bix_ alert.bix_ utlrate_ alert	bixpmf.wft	start date, end date , center, classification
Calls Answered by type -Bar	BIXANSBO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v				start date, end date , center
Calls Answered by center -Bar	BIXANCTO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v				start date, end date , center
Calls Answered -Toime Series	BIXANSLO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v				start date, end date , center
Calls Offered Time Series	BIXOFRLO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v				start date, end date , center
Agent vs Goal	BIXAGOL0	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_ agent_v				start date,end date, goal,agent
Agent vs Group	BIXAGRPO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_ agent_v				start date,end date ,agent
Agent vs Campaign	BIXACMPO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_ agent_v				start date,end date ,agent
Agent vs Center	BIXACTRO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_ agent_v				start date,end date ,agent
Group vs Center	BIXGCTRO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_ agent_v, jtf_rs_ groups_ vl				start date,end date ,agent, group

Report Name	Report Rdf File Name	OLTP	Concurrent Processes	OLTP Tables	Summary Tables	Views	KPIs	Alerts	Workflow	Key Parameters
Service Level vs goal	BIXSLVLO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v	BIX Service Level	bix_ alert.bix_ serlvl_ alert	bixpmf.wft	start date, end date,center ,goal
Average Speed to Answer- Bar	BIXASPBO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v	BIX Speed to answer	bix_ alert.bix_ avgans_alert	bixpmf.wft	start date, end date,center ,goal
Average Speed to Answer- Line	BIXASPLO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls	bix_call_ center_v				start date, end date,center
Inbound agent Summary	BIXINAGO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bix_ sum_ grp_cls, bix_ sum_ agt_cls	bix_call_ center_v, bix_ agent_v				start date, end date, center,agent
Inbound Center Summary	BIXINSMO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS	bixsum _grp_ cls	bix_call_ center_v				start date, end date, center
Contact Center Activity Summary	BIXCCSMO	OTM, UWQ,CS,IEC	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS _INFO, BIX_ INTERACTIONS	bix_ sum_ agt_ cls,bix_ sum_ grp_ cls_ trn,bix_ sum_ grp_ cls,bix_ sum_ grp_ cls_inq	bix_call_ center_v, jtf_rs_ resource_ extns,per _people_f				start date, end date, center,agent
Contact Center Activity Summary - comparison	BIXCCCMO	OTM, UWQ,CS,IEC	BIXSUMPB (populate CCI summary table)	BIX_ INTERACTIONS _INFO, BIX_ INTERACTIONS	bix_ sum_ agt_ cls,bix_ sum_ grp_ cls_ trn,bix_ sum_ grp_ cls,bix_ sum_ grp_ cls_inq	bix_call_ center_v, jtf_rs_ groups_ vl_extns				start date, end date, center,group

Report Name	Report Rdf File Name	OLTP	Concurrent Processes	OLTP Tables	Sum-mary Tables	Views	KPIs	Alerts	Work-flow	Key Parameters
Outbound Call Center Summary	BIXOTSMO	OTM, UWQ	BIXSUMPB (populate CCI summary table)	BIX_INTERACTIONS_INFO, BIX_INTERACTIONS	bix_server_sum_cp,bix_sum_grp_cls,bix_sum_info,jtf_ih_outcomes_vl,	bix_call_center_v, jtf_rs_groups_vl_extns				start date, end date, center,group
Average Talk Time	BIXATLKO	OTM,UWQ	BIXSUMPB (populate CCI summary table)	BIX_INTERACTIONS	bix_sum_grp_cls	bix_call_center_v, jtf_rs_groups_vl_extns	BIX Average talk time	bix_alert.bix_avgtalk_alert	bixpmf.wft	start date, end date, center,group
Productive vs Non Productive time -Agent Level	BIXAGTTO	OTM,UWQ	BIXSUMPB (populate CCI summary table)	BIX_INTERACTIONS	bix_sum_agt_cls	jtf_rs_resource_extns,per_people_f				start date, end date, agent
Productive vs Non Productive time - comparison	BIXAGCMO	OTM.UWQ	BIXSUMPB (populate CCI summary table)	BIX_INTERACTIONS	bix_sum_grp_cls	bix_call_center_v, jtf_rs_groups_vl_extns				start date, end date, center,group
Telephone Time	BIXTELTO	OTM,UWQ	BIXSUMPB (populate CCI summary table)	BIX_INTERACTIONS	bix_sum_grp_cls	bix_call_center_v, jtf_rs_groups_vl_extns				start date, end date, center,group
Blended Occupancy Rate	BIXBLOCO	OTM,UWQ,IEB	BIXSUMPB (populate CCI summary table)	BIX_INTERACTIONS	bix_sum_grp_cls	bix_call_center_v, jtf_rs_groups_vl_extns				start date, end date, center,group
Blended Utilization Rate	BIXBLUT0	OTM,UWQ,IEB	BIXSUMPB (populate CCI summary table)	BIX_INTERACTIONS	bix_sum_grp_cls	bix_call_center_v, jtf_rs_groups_vl_extns				start date, end date, center,group
Blended Service Level	BIXBSLVO	OTM,UWQ,IEB	BIXSUMPB (populate CCI summary table)	BIX_INTERACTIONS	bix_sum_grp_cls	bix_call_center_v, jtf_rs_groups_vl_extns				start date, end date, center,group

Performance Measures for Call Center Intelligence

Call Center Intelligence Performance Measures Table

Display Name	Internal Name	Description	Dimensions
BIX Abandon Call Rate Measurement	BIX_PMF_ABANDON_CALL_ RATE	Measure for Call Rate	Organization, Time, Call Agent
BIX Average Talk Time Measurement	BIX_PMF_AVERAGE_TALK_ TIME	Measure for Average Talk Time	Organization, Time, Call Agent
BIX Average Wait Time to Abandon Measurement	BIX_PMF_AVERAGE_WAIT_ TIME_TO_ABAND	Measure for Average Wait Time to Abandon	Organization, Time, Call Agent
BIX Calls Answered Measurement	BIX_PMF_CALLS_ ANSWERED	Measure for Calls Answered	Organization, Time, Call Agent
BIX Occupancy Rate Measurement	BIX_PMF_OCCUPANCY _ RATE	Measure for Occupancy Rate	Organization, Time, Call Agent
BIX Service Level PMF Measurement	SERVICE_LEVEL	Measure for Service Level	Organization, Time, Call Agent
BIX Utilization Rate Measurement	BIX_PMF_UTILIZATION _ RATE	Measure for Utilization Rate	Organization, Time, Call Agent
BIX Speed to Answer Benchmark	AVG_SPEED_TO_ANSWER	Measure for Average Speed to Answer Time	Organization, Time, Call Agent

Call Center Intelligence Dimensions, Dimension Levels, PMF views and Referred Tables

Dimension Name (Internal Name)	Dimension Level (Internal Name)	Level View	Tables used by the View
Call Agent (CALL_AGENT)	Center (CENTER), Agent (AGENT) Group (GROUP)	BIX_CENTER_V, BIX_AGENT_V, BIX_GROUP_V	CCT_CALL_CENTER(s), JTF_RS_RESOURCE_EXTNS, JTF_RS_GROUPS_VL

Call Center Intelligence Target Levels, Reports, Workflow, and Alerts

Target Level Display Name	Target Level Internal Name	Report	Alert	Process	Tables Workflow
BIX Abandon Call Rate By Month By Center	BIX_PMF_ ABANDON_ ALLORG_ MON_CEN	Abandon Call Rate	BIX: Abandon Call Rate Alert	BIX Send Notification	BIX Corrective Action
Average Talk Time By Month by Center for All Org	BIX_PMF_ AVGTALK_ ALLORG_ MON_CEN	Average Talk Time	BIX: Average Talk Time Alert	BIX Send Notification	BIX Corrective Action
Average Wait Time to Abandon by Month by Center for All Org	BIX_PMF_ AVGWAIT_ ALLORG_ MON_CEN	Wait to Abandon - by Center	BIX: Average Wait to Abandon Alert	BIX Send Notification	BIX Corrective Action
Calls Answered for All Org by Month by Center	BIX_PMF_ CALLANS_ ALLORG_ MON_CEN			BIX Send Notification	BIX Corrective Action
BIX Occupancy Rate by Month by Center	BIX_PMF_ OCCRATE_ ALL_ORG_ MON_CEN	Occupancy Rate - Comparison	BIX: Occupancy Rate Alert	BIX Send Notification	BIX Corrective Action
Service Level By Month By Center for All Org	SERVICE_ LEVEL_ ALLORG_ MON_CEN	Service Level Versus Goal	BIX: Service Level PMF Alert	BIX Send Notification	BIX Corrective Action
Speed to Answer by Month by Center for All Org	SPEED_TO_ ANSWER_ ALLORG_ MON_CEN	Average Speed to Answer - Bar	BIX: Average Speed to Answer Alert	BIX Send Notification	BIX Corrective Action
BIX Utilization Rate By Month By Center for All Org	BIX_PMF_ UTLRATE_ ALLORG_ MON_CEN	Utilization Rate - Comparison	BIX: Utilization Rate PMF Alert	BIX Send Notification	BIX Corrective Action

Performance Issues

We will not be discussing performance issues for Call Center Intelligence in this document.

Setting Up Call Center Intelligence

1. Log on to your Business Intelligence Personal Home Page.
2. Click on Performance Management Framework from the Navigate region.

The Performance Management Framework menu appears on the right. You have three choices:

- **Performance Measures** - Edit existing or create new performance measures.
- **Performance Targets** - Define new or edit existing targets and variance settings.
- **Notifications -** Lists all the notifications that have been received by the current user.

A Performance Measure is associated with a Target Level. Target Levels are Performance Measure with specific sets of dimensions; for example, Time and Organization.

Each Target Level, for example, Sales by Organization, is associated with a numeric value. A target may have up to three tolerance ranges. When actual results exceed the set target tolerance range, workflow notifications are sent to designated responsibilities in your organization informing them of the results.

In order to perform the outlined steps, you must have access to the Performance Management.

3. Click on Performance Measures.
4. Select one of the eight predefined performance measures: BIX Abandon Call Rate Measurement.
5. Click on View Target Levels.
6. Select target level name in order to add responsibilities that can access the target.
7. To add responsibilities to the selected target level, define the following regions:

- Access Region

Assign those responsibilities you want to use the performance measures. For example, if you want the individuals with the Call Center Intelligence responsibility

to use the BIX Abandon Call Rate By Month By Center target level, move Call Center Intelligence to the Selected Responsibilities window.

- Corrective Action Region

Select the following:

Workflow: BIX Corrective Action

Process: BIX Send Notification

Role: Establishes a default notification responsibility

8. Click on Save Changes to save your changes.

The Time and Organization dimensions have been predefined for the performance measures. When you associate responsibilities with a target level, it means that the user with that responsibility can access the target level.

9. Click Done to exit the form.

Setting Up Performance Targets

1. From the Performance Management Framework Menu, click on Performance Targets.
2. From the Display Name list of values, choose BIX Abandon Call Rate By Month By Center
3. Select Organization to define targets.
4. Click on New Targets.

In order to set targets for a specific organization, you must have the appropriate responsibility.

5. In the Target Region, enter Target and Variance Ranges and select the responsibility to Notify you of the Actuals that fall outside the variance ranges.
6. Click on Save to save your work.
7. Click on Done to exit the form.

If you already have targets in the system, click on Edit Targets. The responsibility being notified should have access to the organization.

Schedule Oracle Alerts

You can schedule Alerts to run at almost any frequency and time you desire. You can also run Alerts on demand. When you run an Alert for BIS, the target values for your performance are compared against your actual results. If the Alert detects a variance exceeding the range you set, workflow is launched and the appropriate notifications are sent to individuals belonging to the designated responsibility.

1. Log on to Oracle Applications.
2. Select the Alert Manager responsibility.
3. From the Navigator, select Alert > Define. The Alerts window opens.
4. Query on BIX% in the Name field.
5. Select an alert type, such as BIX: Abandon Call Rate Alert.

At your option, you can enter a description.

6. Choose the Periodic tab.
7. Select a frequency from the Frequency list of values.
8. Complete the Day, Start Time, and End Time fields if required for the frequency you select.

You are not required to complete any other fields.

9. Click on Save to save your work.
10. Click on Done to exit the form.

Run Alert on Demand

1. Log on to Oracle Applications.
2. Select the Alert Manager responsibility.
3. From the Navigator, select Request > Check.

The Request Periodic Alert Check window appears.

4. Select Call Center Intelligence from the Application list of values.
5. Select one of the three alert types from the Alert list of values.

If you do not want your request to run immediately, change the default date and time.

6. Submit your request.

Testing Oracle Call Center Intelligence

1. Login to Oracle Call Center Intelligence.
2. Login to the BIS PHP using 2 different users created previously. Ensure that the default PHP is appearing for both log-in ID.

Testing Call Center Intelligence

1. Login to SSWA.

Login as Regular User: Regular User Functionality

2. Click on the Exit icon on the top bar of the PHP.

You will be sent back to the SSWA log-in page.

3. Login to SSWA. Login as Super User: Super User Functionality.
4. Click on the Exit icon on the top bar of the PHP. You will be sent back to the SSWA log-in page
5. Click on the Call Center Intelligence responsibility in the navigate region of the PHP.

This will display the reports menu.

6. Click on the Abandon Call Rate report.

The report will appear.

7. Run report.

Use default data, which is the first graph with standard defaults.

8. Click on the Help icon.

An online help window will appear with information about the report.

9. Click on hypertext column headers in the table (not applicable for all reports).

Detail Report opens and Sales Reps ranked by column header.

10. Click on related reports.

Verify that you are taken to the correct report and that common parameters have been passed.

11. Click on Customize in the Related information area.

Select a report you wish to be added as related information.

12. Click OK.

Printing Call Center Intelligence Reports from the Web Browser

While printing the report from your web browser, you might experience large font sizes on your printed report. To resolve this problems, follow these steps to change your browser settings:

1. Go to Tools and select Internet Options.
2. Under the General tab, click on the Accessibility button.
3. Check the box, Ignore font sizes specified on the web pages.

It is listed under, Formatting.

4. Save your work.
5. Click Done.

In the PHP, do not define more than one report in the Plug.

If you define more than one report, you will delay displaying the PHP page. Reports defined in the plug area runs sequentially, and the PHP page will be displayed only after you complete defining all the reports in the plug area.

Troubleshooting Call Center Intelligence

No troubleshooting issues for this document.

Related Documentation and Resources

Call Center Intelligence documentation is available through iHelp and the BIS Implementation Guide. Click the help icon on each report to refer documentation for that report while accessing the Call Center Intelligence reports.

For additional information on Call Center Intelligence, as well as other related products, refer to Metalink and www.oracle.com.