CallCenterAnywhere™

Administration Manager

User's Guide

Version 7.1.7

CCA USER GUIDE

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Contents

Chapter 4 Creating CCA Libraries

Chapter 5 Customizing Prompts

Chapter 9 Campaigns

Chapter 10 Creating Projects

Figures

Tables

Introduction

What is the Administration Manager?

The Administration Manager is a browser-based software program allowing users to set up, configure, and maintain a CCA^{TM} (CCA) multi-media call center.

No programming experience is required to administer a CCA Call Center. However, some planning and information gathering is necessary to get your call center up and running quickly and smoothly.

This manual guides users through the call center planning process and describes how to use the Administration Manager to implement the call center.

You need Internet Explorer, version 6.0 or above, to use Administration Manager.

Product Features

Using Administration Manager, you can perform all call center administration and configuration tasks from any computer with a browser and an Internet connection. Common tasks include:

- Creating Agent and Supervisor Accounts
- Configuring Agent Extensions
- Defining and assigning Agent Skills for intelligent call routing
- Creating Workgroups for handling various customer-types
- Assigning weight to Agent Skills within Agent Workgroups

- Creating routing strategies for incoming interactions of various media
- Creating Interactive Voice Response (IVR) Menus
- Building content libraries for your Agents to use when handling interactions
- Recording and storing prompts for greeting and handling telephone customers
- Assigning Priorities to customers
- Customizing, generating, and printing call center reports

Administration Manager Interface

The Administration Manager's browser-hosted interface provides logically grouped controls for quickly navigating to all Administration Manager screens. The Administration Manager interface is divided into two re-sizable sections; the Navigation Pane on the left and the Results Pane on the right.

The **Navigation Pane** contains four groups of links to various Administration Manager screens. As you click links in the Navigation Pane, the Administration Manager displays a sortable, tabular list of member objects in the Results Pane.

The **Results Pane** is a dynamically updated area containing the members of the link you selected in the Navigation pane. The Results pane also contains, when you "drill-down" into a selected object, the editing screens you use to add and modify the properties of these objects.

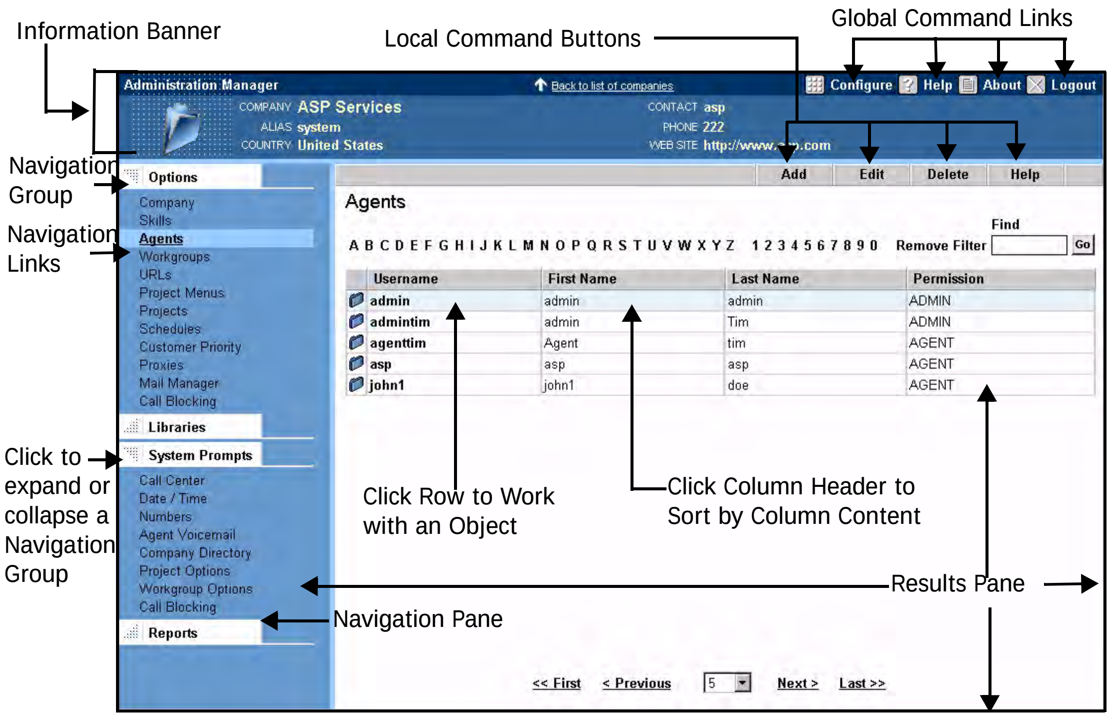

Figure 1-1 Example AM Screen: List of Editable Agent Accounts

The Results Pane in the example screen shown in Figure 1-1 contains a list of agent accounts defined for a company. Each row in the Results Pane represents an editable agent account. Clicking anywhere on a row selects that object for editing (or deleting) using the Local Command buttons or by clicking the commands on the context (right-click) menu.

The Administration Manager Options, Library, and Reports links contain no objects for editing, until you add them (following the instructions in this manual).

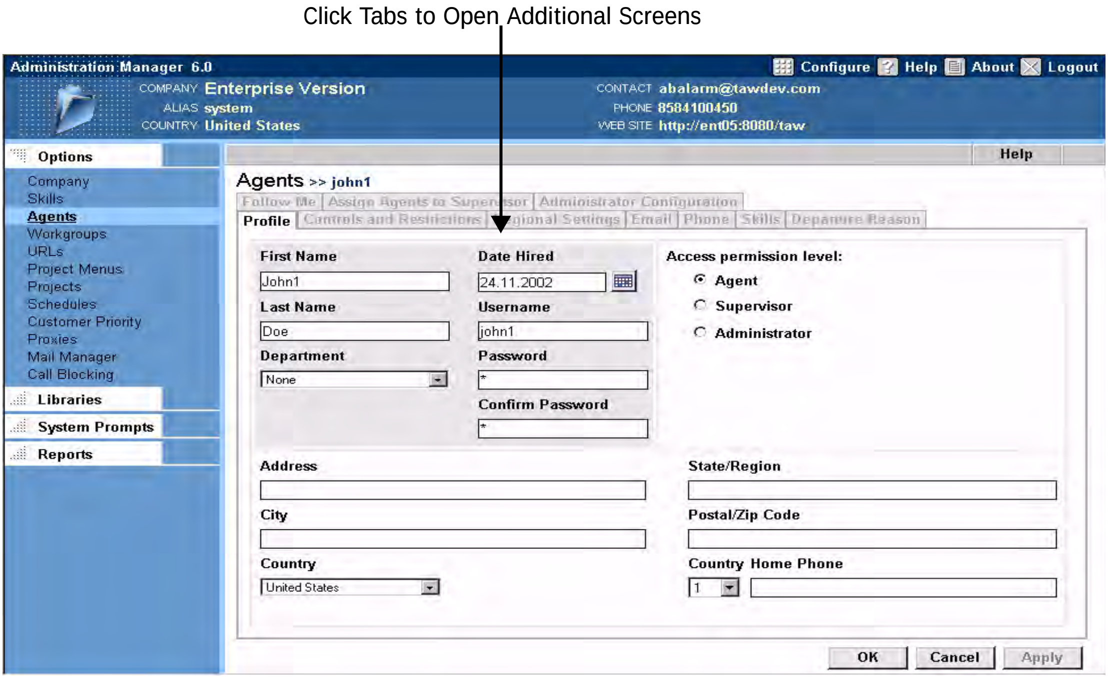

Figure 1-2 Example AM Screen: Editing the Selected Agent Account

Figure 1-2 shows an example of a editing screen for an agent account called ***Jayr***. This account contains editable properties, which CCA presents on additional screens or “tabs.” Click the labeled tabs to open each additional screen for editing or viewing.

CCA Reports

Use the Administration Manager to define, generate, and view the full suite of CCA Reports. See the **Reports Chapters** for a complete description of the supplied report types and how to create and view them.

Call Flow Overview

1. A customer dials a call to the call center.

2. CCA finds the project, using the number that the customer dialed.

3. CCA verifies that the company receiving the call has a valid license.

4. CCA routes the call to a workgroup queue where it waits for the ACD Server to assign the call to an agent.

5. When an agent is available, the CTI Server finds the agent’s extension. CCA dials the agent’s extension and the IM Server offers the interaction to the agent.

Planning a Call Center

Whether you are implementing a call center for your own company, or you are an Application Service Provider (ASP) setting up call center services for a customer, carefully planning the call center operations is the best and quickest way to get started.

The *CCA™ Administrator's Planning Survey* helps plan a call center by presenting questions about how the business is organized and identifying which CCA features to implement. Use the answers to the survey questions to guide you later, as you use the Administration Manager to set up the call center.

CCA™ Administrator's Planning Survey

Use the following pages to record your answers to the CCA Planning Survey:

Question 1: What *kinds* of interactions will the call center accept?

Use Table 2-1 to identify how customers will contact the call center. Place a check mark next to all media types the call center will accept.

Table 2-1. Possible Media Types and Descriptions

Check	Media	Description
	Telephone	Customers dial into the call center using their telephone
	Email	Customers reach the call center by writing to an email address

Table 2-1. Possible Media Types and Descriptions

Check	Media	Description
	Chat	Customers reach the call center by using your Web site to request a chat (real-time communication) with an agent
	Web	Customers reach the call center by using your web site to request that an Agent call them back on the telephone
	Predictive Dialing	CCA calls customers on the telephone and connects them to a waiting agent, when successful
	Preview Dialing	CCA calls customers and allows the agent to control placement of the call

Question 2: What numbers will telephone-customers dial to reach the call center?

- Customers will dial one telephone number: ___________________
- Customers will dial different numbers to reach various phone projects in the business:

Table 2-2. Phone Projects and Corresponding Telephone Numbers

Phone Project Name	Telephone Number

CCA Phone Projects allow you to create and save strategies for routing interactions to agents in your call center.

If you plan to accept telephone interactions, you must choose at least one telephone number (DNIS), which customers dial to reach your call center.

If you plan to use different Phone Projects to handle various customer types with various call routing strategies, you must reserve a unique phone number for ***each*** CCA Phone Project.

Question 3: What email addresses will email-customers use to contact the call center?

- My customers will write to one email address: __________________
- My customers will write to different email addresses to reach various contact center projects in my business:

Table 2-3. Email Address and Corresponding Depts or Workgroups

Email Address	Department/Workgroup

Question 4: What fax numbers will fax-customers use to contact the call center?

- My customers will fax to one number: __________________________
- My customers will fax to different numbers to reach various fax Projects in my business:

Table 2-4. Fax Number and Corresponding Dept or Workgroup

Fax Number	Department/Workgroup

Question 5: What Web addresses will customers use to request a chat or callback from an agent?

- My customers will access one Website: ________________________
- My customers will access different Websites to reach various projects:

Table 2-5. Website Address, Project, and Project Type

Website Address	Project Name	Project Type (Chat or Web Callback)

Question 6: How will the call center handle different types of interactions?

CCA allows the call center to manage interactions originating from different media in different ways.

For example, customers calling the call center by phone can identify their needs using a menu and then CCA can route their call to an agent in the correct workgroup. In contrast, all CCA could route all chat interactions directly to technical support or another workgroup.

Consider diagramming the various routes interactions will take from the moment they enter your call center, until they reach their final destination (agent, fax machine, or other resource).

Understanding how to route interactions of each media type is important for setting up CCA projects and workgroups using the Administration Manager.

Question 7: What are the workgroup names, phone extension, and email address for each agent?

CCA lets you route calls to agents in the appropriate workgroup based on the caller's needs. If all agents are serving the same customers, then there is no need to divide agents into multiple workgroups. In this case, you can route all callers to a single workgroup or directly to an agent's phone extension.

However, if you plan to route callers to agents working in functional groups, use the Table 2-6 to define your company's workgroups, and identify which agents belong to which group or groups.

Table 2-6. Agent Names, Workgroups, Extensions, and Email Addresses

Agent Name	Workgroups	Extension	Email Address

An agent can be a member of multiple workgroups.

Question 8: Will the call center need recordings to greet customers?

When customers reach your call center by telephone, there are a number of ways to greet the customer, including:

- Live Operator (operator transfers the caller to the appropriate workgroup or agent).
- Recorded greeting with no routing options (caller is immediately placed into a Workgroup queue).
- Recorded greeting with menu options (caller is routed to an agent or workgroup queue based on their selection).

In Table 2-7, specify a prompt file for each phone number callers dial to reach your call center (see “Question 2: What numbers will telephone-customers dial to reach the call center?”).

If you plan to organize your call center agents into workgroups, specify a prompt file that will greet callers entering each workgroup. It is important to identify early, which prompt file and text to use when greeting callers reach each call center project or workgroup.

Table 2-7. Project or Workgroup and a Corresponding Sound File or Text Greeting

Project or Workgroup Name	File Name (.wav)	Text for the Greeting/Prompt

Lean how to record prompts later in this manual.

If the call center plans to have an agent act as a live operator and transfer callers to other agents or workgroups, then a recorded greeting for phone projects is not necessary.

Question 9: Will you need to record prompts describing your touch-tone menus?

If the call center plans to use touch-tone menus to route callers to workgroups, agents, or other resources, then you must create recorded prompts describing the touch-tone options available for the caller.

It is important, however, to identify now which prompt file to use for each menu and the text that the customer will hear describing the menu options.

Use Table 2-8 to identify sound files and prompt text.

Table 2-8. Sound File or Prompt Text

File Name (.wav)	Text for the prompt

Learn how to create menus and record the prompts (describing the menus) later in this manual.

Question 10: Will you need customized recordings for callers waiting for an agent?

In addition to the greeting that callers hear when they reach the call center, there are other recorded messages that they can hear while they are waiting to be connected to an agent.

Prompts describing additional options (such as “Press two to enter your telephone number and receive a call back”) or notifying the caller of their estimated wait time (such as “Your estimated wait time is one minute”) are examples of Workgroup Queue Prompts (see “Workgroup Option Prompts” on page 5-22).

Although CCA provides pre-recorded prompts using a female voice, you can create unique recordings using a different voice or different text.

Question 11: What skills will your agents possess for call routing?

Agent skills are the abilities that agents possess that allow them to handle interactions coming into the call center. CCA matches the needs of the caller with the skills of all available agents, and routes the interaction to the agent most qualified to handle the interaction.

For example, if your call center receives callers who speak Spanish and French in addition to English, you might create two agent skills (“Speaks French” and “Speaks Spanish”) to supplement the ability to speak English, which all agents possess. Therefore, when a Spanish-speaking caller reaches the call center, CCA routes the caller to the available agent with the highest score for the “Speaks Spanish” skill.

Table 2-9. Agent Skills and Corresponding Descriptions

Skill	Description

Question 12: What statuses will you use for your agents?

CCA identifies the status of every agent presently logged into the system. Supervisors use these status indicators to monitor agent activity. Agents depend on their status indicator to control their availability.

If you want additional agent statuses to reflect activities of the agents in your call center, identify them in Table 2-10.

Table 2-10. Additional Agent Status Indicators and Descriptions

Agent Status	Description/Purpose

See “Creating Agent Statuses” on page 4-6 for a list of pre-defined system statuses.

Question 13: Will your agents read prepared scripts?

By compiling a library of prepared scripts, your agents can access important information while providing service to customers. Example scripts include a sales pitch, responses to common questions, a list of troubleshooting steps, or any other information the agent uses to provide quality service to the customer.

In Table 2-11, identify the name, description, and URL (such as “*Sales Pitch 1*,” “*Sales Copy for Ginsu Knife Set*,” and `http://mynet.sales.ginsupitch.htm`) for each script you plan to provide your agents.

Table 2-11. Script Name, URL, and Corresponding Description

Name	Description
URL:	

Table 2-11. Script Name, URL, and Corresponding Description

Name	Description
URL:	
URL	
URL	
URL	

Question 14: Will your agents read from an FAQ?

By compiling a library of FAQ (frequently asked questions), your agents can immediately respond to common questions, ensuring consistent and quality service to the caller.

In Table 2-12, identify a question, answer, or supporting URL.

Table 2-12. FAQ Question, Description, Supporting URL

Name	Description
URL:	
URL:	
URL	
URL	
URL	

Question 15: Will agents be allowed to provide Web pages for chat-based customers?

Using a library of website links, from which agents can select and send to chat-based customers, is an excellent way of quickly pointing customers to the information they need.

In Table 2-13, list the URLs agents can use when serving customers.

Table 2-13. Web Page Name, Description, and URL

Name	Description
URL:	
URL:	
URL:	
URL:	
URL:	

Question 16: Will you automatically display Web pages to chat-based customers?

If desired, you can automatically display Web pages (“push pages”) to customers who request a chat session with an agent.

Use the URL cell in Table 2-14 to record the URL for each Web page to display for each event, when a customer requests a chat with one of the call center agents.

Table 2-14. Chat Event, Name, Description, and URL

Chat Event	Name	Description
1. Waiting		After the customer submits a request for a chat session, this page appears on their screen until they are connected with an agent. (Suggested content for this page is a ‘thank you’ to the customer for their inquiry and notification that they will soon be chatting with an agent.)
	URL:	
2. Still Waiting		These pages appear after the initial “Waiting” page, only if the chat customer is still waiting to be connected to an agent. (Suggested content for these pages are product information, answers to frequently asked questions, and so forth.)
	URL:	
	URL:	
	URL:	
	URL:	
	URL:	
3. Connected		This page appears after the customer successfully connects to an agent.
	URL:	
4. Disconnected		This page appears when the agent disconnects from the chat customer.
	URL:	

Table 2-14. Chat Event, Name, Description, and URL

Chat Event	Name	Description
No Agents Available		This page appears when no agents are available.
	URL:	

You must create the HTML Web pages for each of the above events and place them on your Web server in the URL location you specify in Table 2-14.

Question 17: Will agents provide prepared content to customers contacted in response to a Web callback request?

By creating a library of pre-developed Web callback content, agents can respond to customers quickly and consistently.

In Table 2-15, provide a name for the Web callback response content, a description of the content, and the URL containing the text.

Table 2-15. Web Callback Response Name, Description, and URL

Name	Description	URL

Question 18: Will agents provide prepared email responses to customers?

Creating a library of pre-developed email responses also allows agents to respond to customers quickly and consistently.

In Table 2-16, identify the subject of the email response, the URL containing the email response text, and workgroup that will use each prepared email.

Table 2-16. Email Response Subject, Workgroup, and URL

Email Subject	Workgroup	URL

Question 19: Will your agents provide prepared fax responses to customers?

You can create a library of pre-developed fax responses for your agents to provide customers. Providing agents with prepared facsimiles of the forms most frequently requested of them allows the agents to respond to your customers quickly and consistently

In Table 2-17, identify the name of the fax response, and the path and file name containing the fax contents.

Table 2-17. Fax Name and Corresponding File

Fax Name	File Name (.TIF or .TIFF)

You must store CCA fax responses as Tagged Image File Format (TIFF) files in the Fax Library. When saving fax responses, select ***Class F*** with ***CCITT Group 3 1D*** compression to ensure compatibility with CCA and the telephony hardware.

Question 20: Will you track interaction results?

Tracking the results of call center interactions is a good way to measure and compare the performance of agents. With the outcomes feature enabled, you can create administrative reports to analyze the results of all interactions handled by agents.

You can configure CCA to automatically display the outcome library and ***require*** agents to choose an outcome at the conclusion of every interaction.

In Table 2-18, identify the outcome you create for the Outcome Library. (Example outcomes are “Placed Order,” “Issue Resolved,” “Issue Pending,” and so forth.)

Table 2-18. Outcomes and Descriptions

Outcome	Description

Question 21: Will you send an automated email acknowledgment to email customers?

You can create a library of pre-developed email content that CCA can send automatically to customers who reach the call center by email. Typically, the content of the automated reply email is something like “Thank you for your inquiry, an agent will be contacting you shortly.”

In Table 2-19, identify the subject of each automated email reply you to use with the call center.

Table 2-19. Auto Email Response File Name and Description

Automated Email Acknowledgment Name	File Name	Description

Table 2-19. Auto Email Response File Name and Description

Automated Email Acknowledgment Name	File Name	Description

Question 22: What email servers will the call center use to receive emails from customers?

CCA allows you to specify multiple email servers for automatic load balancing of email traffic. Identify these in Table 2-20.

Table 2-20. Email Servers, Hosts, Usernames, and Passwords

POP3 Servers	Host	Username	Password

Question 23: What email servers will call center agents use to send emails to customers?

CCA allows you to specify multiple email servers for automatic load balancing of email traffic. Identify them in Table 2-21.

Table 2-21. SMTP Servers, Hosts, and Domains

SMTP Servers	Host	Domain

Question 24: Will some or all agents and supervisors connect to the call center through a proxy server?

CCA supports agent and supervisor workstation connections through a proxy server. Use Table 2-22 to list the proxy servers to which agents and supervisors will connect.

Provide the server name, the name of the host on which each proxy server resides, and the authentication information necessary to connect to the proxy server.

Table 2-22. Proxy Server Name, Host Name and Authentication Information

Proxy Server Name	Proxy Server Host Name	Authentication Information
		Username:
		Password:
		Domain:
		Username:
		Password:
		Domain:
		Username:
		Password:
		Domain:

Also see “To change your proxy settings in Internet Explorer” on page 3-6.

3

Getting Started

This chapter describes how to launch the Administration Manager and begin setting up a call center.

Make sure to complete the *CCA Planning Survey* (see “CCA™ Administrator’s Planning Survey” on page 2-1) and keep the responses handy.

Setting Up Your Call Center In Administration Manager

Administration Manager is a powerful program that supports a large number of features, options, and settings. You can configure many of the features in Administration Manager at any time. For example, you can add Intelligent Email Templates after getting your call center up and running.

However, you must perform some configuration tasks in Administration Manager in a specific order. For example, you must to have your POP3 server information on hand before you configure your company and agents.

Table 3-1 shows the tasks and their order, that you must perform to get a very simple call center up and running.

Table 3-1. Tasks and Task Order To Set up Call Center

Task	Description
1. Create email accounts using your company mail server.	Create email accounts for: • All of your Agents, Supervisors, and other Administrators. • Your company voicemail, fax, alarm notification, and storage. (See “Setting Up the Company Email Addresses” on page 3-15.) • Your Projects. (See “Adding Email Interactions to a Project” on page 10-66.)
2. Configure your Administration settings.	Login to Administration Manager and configure the Administration settings (including the time zone and a few other settings). (See “Configuring the Administration Manager” on page 3-8.)
3. Identify the POP3 servers and SMTP server to Administration Manager.	• Refer to “Creating a POP3 Server Library” on page 4-66. • Refer to “Creating an SMTP Server Library” on page 4-62 and “Creating an SMTP Server Group Library” on page 4-64.
4. Create or configure a new company.	• If you have the **Service Provider** edition of CCA, create and configure a new company in Administration Manager for each company for which you provide services. (See “Adding/Editing a Company” on page 3-11.) • If you have the **Enterprise** edition of CCA and you only need to set up one call center for your company, you will find that your company already exists in Administration Manager and you only need to configure it. (See “Adding/Editing a Company” on page 3-11.)
5. Create the list of Agent Skills.	Refer to “Creating an Agent Skills Library” on page 4-2.
6. Create accounts for Agents, Supervisors, and other Administrators.	Refer to “To create user accounts” on page 6-4.
7. Create Workgroups.	Refer to “Creating a Workgroup” on page 7-3.
8. Create Projects.	Refer to “Creating a Project Definition” on page 10-1.

Synchronizing Server Time and Time Zone

It is critical that all CCA server machines are set to the same time (date and time properties for window machines). If one or more servers are not set to the same time as the other servers, severe operational errors may occur; including failures of master backups and scheduled activities.

We recommend setting all servers to run at the same time in the GMT time zone. If you don't want all of your servers to use the same time zone, make sure that they are still time synchronized. For example, if you have a server in San Diego and another in London, and both are running in local time zones, and:

- The San Diego server time is 12:00 noon.
- You must set the London server to 8:00 PM, since London is 8 hours ahead of San Diego.

Starting and Logging In

The first time you use the Administration Manager, you must use your browser to open the Administration Manager login screen, much as you would load a typical Internet website in a browser.

- If you are logging in through a proxy server, or would like to set up CCA to use a proxy server, see "Setting the Agent's Proxy Information" on page 3-6.

To launch Administration Manager the first time

1. Start Internet Explorer (version 6.0 or above).

2. Enter the address of the Administration Manager that was provided by Telephony@Work or by your service provider.

   The CCA Welcome screen (Figure 3-1) opens.

Figure 3-1 CCA Login Screen

Add this page to your Internet Explorer Favorites menu.

---

a. If you are using the **Service Provider Edition**:

   i. Enter **system** in the Company Alias text box.

   ii. Enter **netadmin** in the User name text box.

   iii. Enter the ***password*** (provided by Telephony@Work) in the Password text box.

b. If you are using the **Enterprise Edition**:

   i. Enter the ***Company alias*** (supplied by your vendor or Application Service Provider).

ii. Enter the ***user name*** and ***password*** that were supplied by your vendor or Application Service Provider.

3. From the drop-down menu, choose your Language. (All Administration Manager (AM) session screens will appear in the language you choose.)

4. Click the **Administration Manager** icon.

   The AM screen opens to either the Company List screen (Figure 3-2) or the Company Profile screen, depending upon which version you are using.

The **Service Provider Edition** displays the Company List screen (Figure 3-2).
The **Enterprise Edition** displays the Company Profile screen.

Figure 3-2 Company List Screen (Service Provider Edition Only)

Setting the Agent's Proxy Information

CCA gets proxy information directly from the agent's browser. The **Options** > **Proxies** screen in AM is obsolete. It should not be used and will be removed in a future build.

To change your proxy settings in Internet Explorer

1. Start Internet Explorer. From the **Tools** menu, choose **Internet Options...**
2. In the Internet Options dialog box, select the **Connections** tab, then click the **LAN Settings...** button.
3. In the Local Area Network Settings dialog box (Figure 3-3):

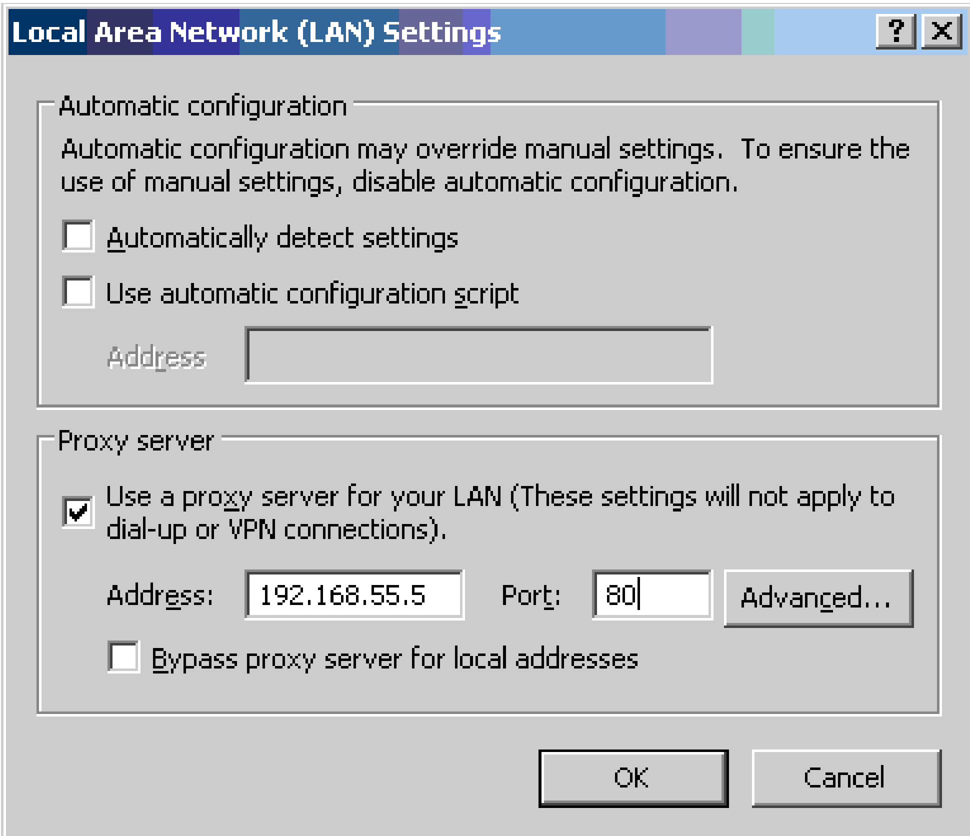

Figure 3-3 Setting a Proxy in Internet Explorer

a. Click the U**se a Proxy Server for Your LAN** check box.

b. In the Address text box, type the IP address of the proxy machine.

c. In the Port text box, type the proxy machine port number.

4. Click the **OK** button.

Configuring the Administration Manager

Configure your Administration Manager workstation for:

- Setting Your Language
- Setting Your Time Zone and Date Format
- Setting Your Inactivity Timeout

Setting Your Language

If you work in a different time zone than most of your agents or different than your company headquarters, you may want to configure your settings to match their time zone and date format.

To set your language

1. Click the **Configure** link (top right) and then click the **Regional Options** tab (Figure 3-4).

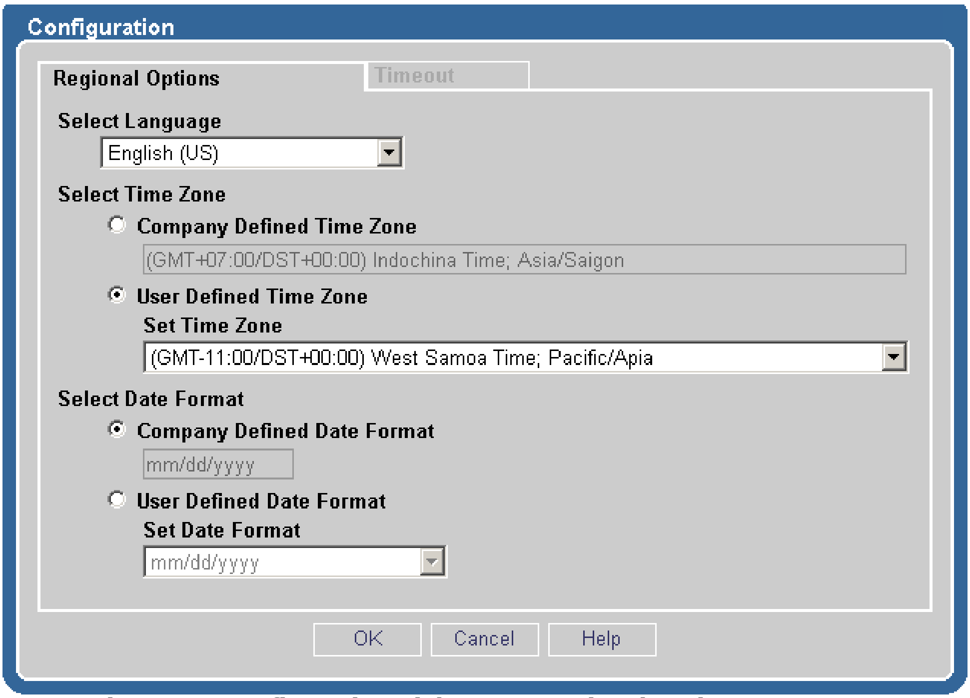

Figure 3-4 Configuration Dialog Box: Regional Options

2. From the Select Language drop-down menu, select your language.

3. Click **OK** to save your configuration settings. All AM screens will now display text in the language you selected.

Setting Your Time Zone and Date Format

If you work in a different time zone than most of your agents or different than your company headquarters, you may want to configure your workstation settings to match their time zone and date format.

To set your time zone and date format

1. Click the **Configure** link (top right) and then click the **Regional Options** tab (Figure 3-5).

2. To set your time zone to the same time zone defined for your company, choose **Company Defined Time Zone**.

   or

   To set a specific time zone, choose **User Defined Time Zone** and then select a time zone from the **Set Time Zone** drop-down list. Refer to Figure 3-5.

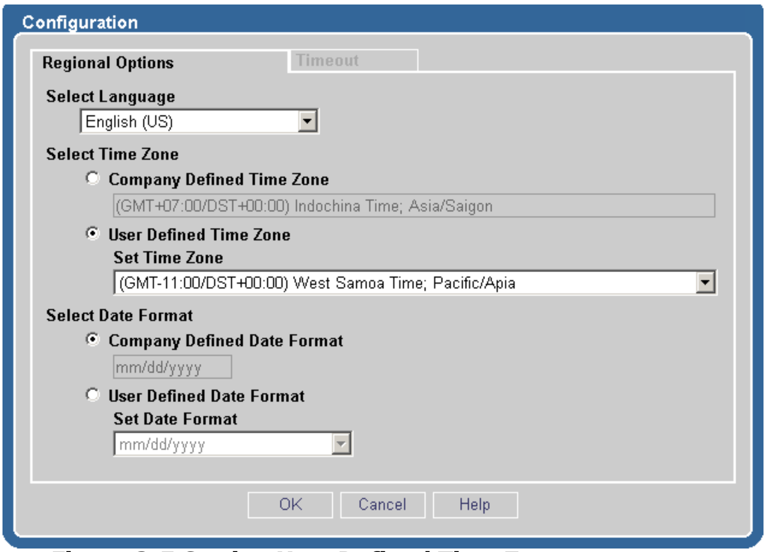

Figure 3-5 Setting User Defined Time Zone

3. To set your date format to the same date format defined for your company, choose **Company Defined Date Format**.

   or

   To set a specific date format, choose **User Defined Date Format**, and then choose a format from the **Set Date Format** drop-down list.

4. Click **OK** to save your configuration settings. All AM screens display times and dates in the zone and format you selected.

Setting Your Inactivity Timeout

You can set an inactivity timeout for the Administration Manager program so that if the program sits idle (meaning no mouse clicks or keystrokes) for the amount of time you specify, the program automatically logs you out.

To set your inactivity timeout

1. Click the **Configure** link (top right) and then select the **Timeout** tab (Figure 3-6).

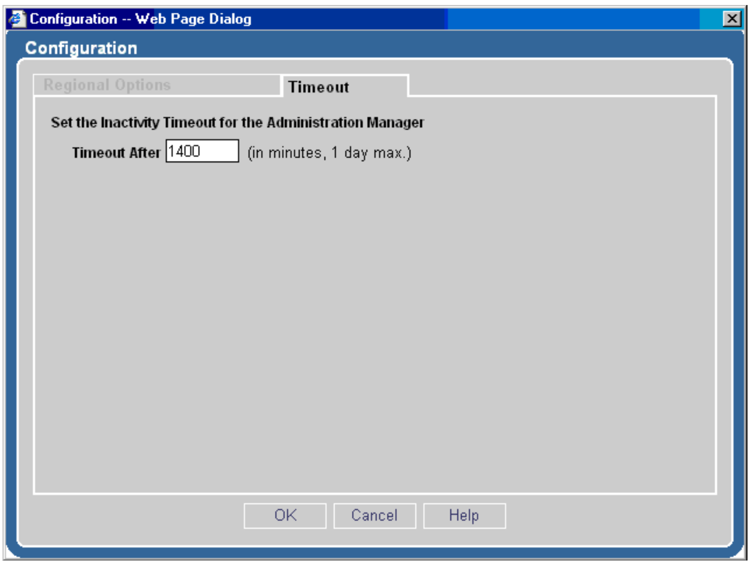

Figure 3-6 Configuration: Timeout Tab

2. In the **Timeout After** text box, enter the number of minutes after which AM will automatically log you out.

3. Click **OK** to save your configuration settings.

Adding/Editing a Company

If you are an Application Service Provider (ASP) setting up a call center for a customer, you must use the Administration Manager to create a *Company definition* to hold the settings and definitions for the customer's call center. You must create one company for each customer for whom you are providing call center application services.

If you are running the Enterprise Edition of CCA, you can modify your company information, but you ***cannot*** create new company definitions.

Adding or editing a Company definition consists of the following tasks:

- Configuring the Company Profile
- Supplying/Editing Company Contact Information
- Setting Up the Company Email Addresses
- Configuring Company Time Zone and Date Format
- Setting Company Business Hours
- Creating List of Project Phone Numbers

Configuring the Company Profile

Use the **Profile** tab to supply or edit the name, address, and Website of your company (or of the company for which you are providing call center services).

To configure the company profile

1. Log into the Administration Manager (see "Starting and Logging In" on page 3-3).

2. (***Service Provider Edition Only***) Perform a or b:

a. To create a new Company definition, click **Add**.

b. To modify an existing Company, click the row for the Company, and then click **Edit**. The Company screen opens to the Profile tab (Figure 3-7).

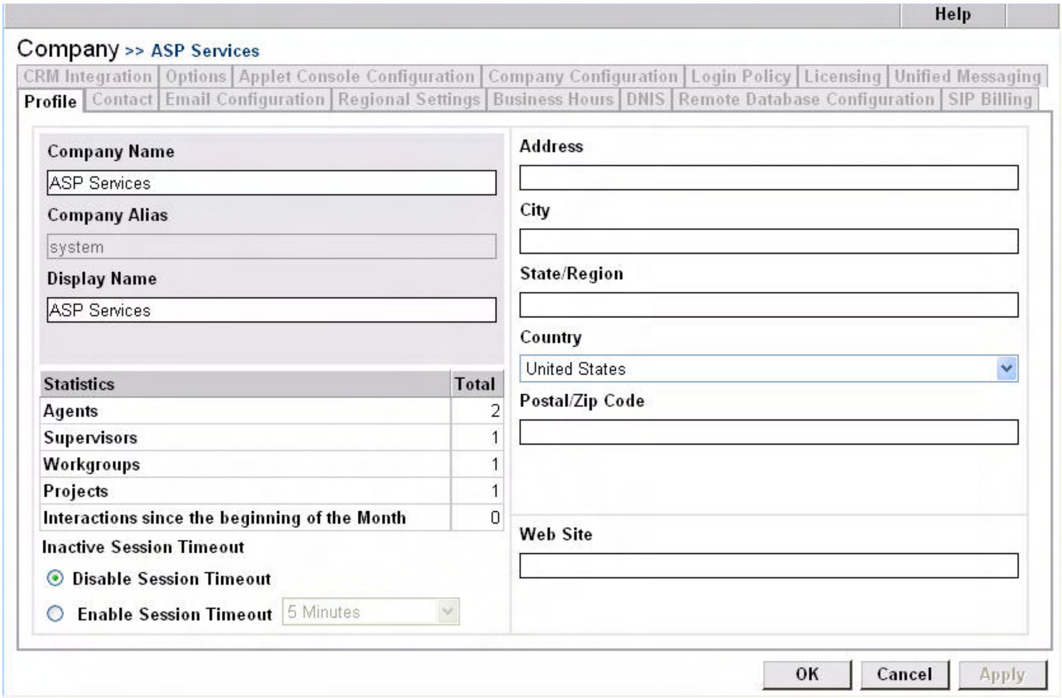

Figure 3-7 Company Profile Tab

3. Use the information in Table 3-2 to complete or edit the fields in the **Company Profile** tab.

Table 3-2. Profile Tab Fields and Descriptions

Field	Description
Company Name	(***Service Provider Edition only***) Enter the full name of the company for which you are providing call center services.
Company Alias	(***Service Provider Edition only***) Enter a unique identifier for this company. CCA uses this alias to differentiate companies in the database, so you must provide a unique alias for **each** company.

Table 3-2. Profile Tab Fields and Descriptions

Field	Description
Display Name	Enter the name to display for this company on the CCA Company List screen. **Note**: The display name does not appear elsewhere in the system or in any CCA reports. **Tip:** If you administer a large number of companies (including companies with foreign-language names), enter a value that is intuitive to you to make it easier to locate the company from the Company List. **Note**: This field accepts only Latin (ASCII) characters.
Address	Enter the street address for the company for which you are providing call center services.
City	Enter the city where the company for which you are providing services is located.
State/Region	Enter the state or region where the company for which you are providing services is located.
Country	Choose the country where the company for which you are providing services is located.
Postal/Zip Code	Enter the zip code or postal code in which the company for which you are providing services is located.
Web Site	Enter the URL of the website for the company for which you are providing services.
Statistics	Do **NOT** enter any values in these fields. For the most part, these fields summarize settings that you may do in later chapters. For example, in a later chapter you will create accounts for your agents. After you create your agent accounts, the system updates the agents field in the Company > Profile tab, showing how many agent accounts you created.
Inactive Session Timeout: **Disable Session Timeout**	Click this option so that CCA will ***never*** automatically log out agents and supervisors.

Table 3-2. Profile Tab Fields and Descriptions

Field	Description
Inactive Session Timeout: **Enable Session Timeout**	Select a timeout value between 5 minutes and 24 hours. This is when CCA will automatically log out an agent or supervisor after a inactivity. You can enter a time for the entire company. If you change the session timeout at the company level, AM requests whether you want to apply the change to all agents. • If you apply the change to all agents, CCA changes the session timeout for all agents to the new company value. • If you do not apply the change to all agents, existing agents will keep their current session timeout value. New agents will get the new company session timeout value. **Note:** To apply an inactive timeout to an individual agent, use the Inactive Session Timeout from the Options > Agents > Controls and Restrictions tab. See "Inactive Session Timeout" on page 6-9.

4. Click **OK** to create the new company.

Supplying/Editing Company Contact Information

Use the **Contact** tab (Figure 3-8) to supply, edit, or view the names, addresses, and telephone numbers for the contact persons at your company (or at the company for which you are providing call center services).

To enter or edit company contact information

1. Select the company to edit (***Service Provider Edition only***).
2. Select **Options** > **Company** > **Contact** tab (Figure 3-8).

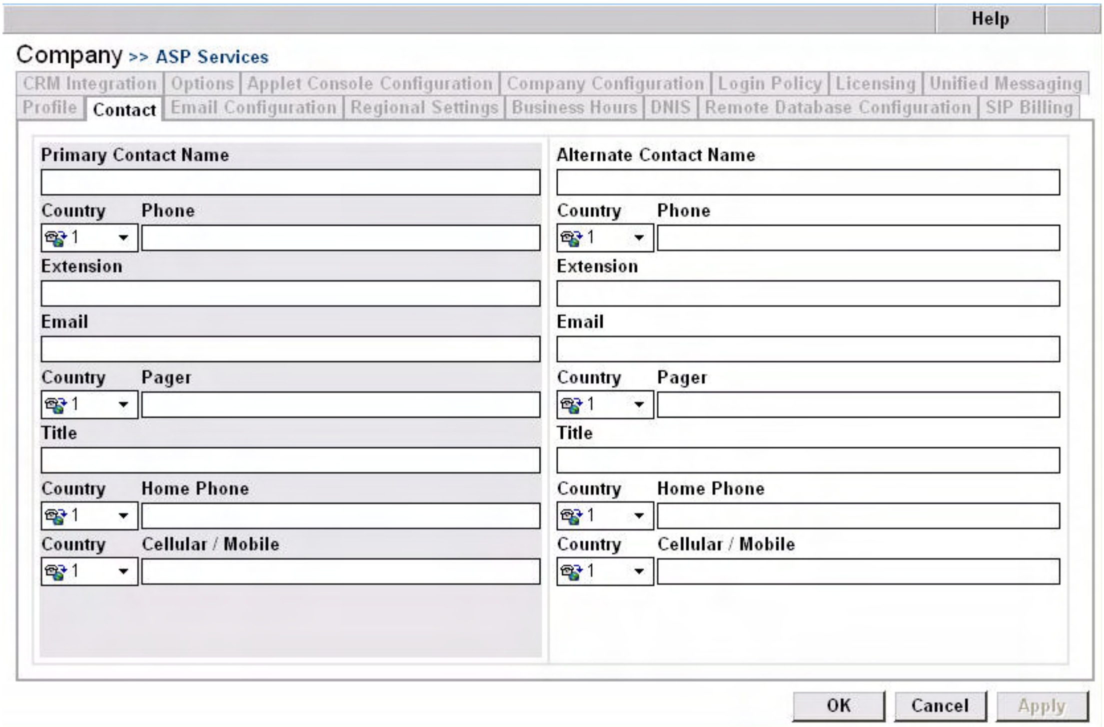

Figure 3-8 Company Contact Tab

3. Complete the company contact fields with the information necessary to contact the person in charge of the call center at the customer's site.

4. Click **Apply**.

Setting Up the Company Email Addresses

Use the **Email Configuration** tab (Figure 3-9) to supply, edit, or view the email addresses and servers that CCA uses to handle incoming email interactions and outgoing agent responses for your company (or the company for which you are providing call center services).

To set up the company email addresses

1. Select the company to edit (***Service Provider Edition only***).
2. Select **Options** > **Company** > **Email Configuration** tab.

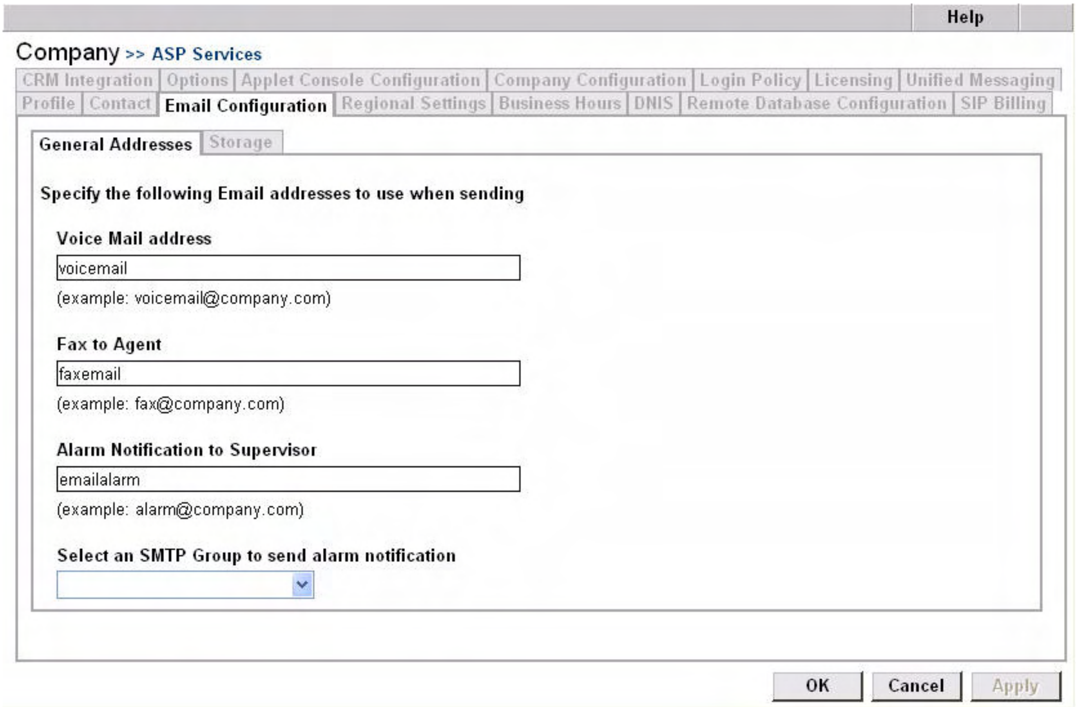

Figure 3-9 Email Configuration Tab - General Addresses Subtab

3. Using the information provided in Table 3-3, complete the **Email Configuration** - **General Addresses** fields.

Table 3-3. General Addresses Tab Fields and Descriptions

Field	Description
Voice Mail address	Enter the email address to use as the return address on emails sent to agents, which contain voice mail attachments. (This means, if there is a problem delivering an email containing a voice mail attachment to the agent, CCA sends the email and attachment to this address.)

Table 3-3. General Addresses Tab Fields and Descriptions

Field	Description
Fax to Agent	Enter the email address to use as the return address on emails sent to agents, which contain fax attachments. (This means, if there is a problem delivering an email containing a fax attachment to the agent, CCA sends the email and attachment to this address.)
Alarm notification to Supervisor	If an email error occurs, CCA sends an alarm notification to this address. This may happen when: • An email could not be sent to an agent. • An email could not be parsed. (For example, the email body was corrupt.) • The agent accepts the email interaction and then discards it without replying. (CCA forwards the email to the alarm address.) • The Company Storage Email Address was changed. If the storage changes, CCA sends an alarm notification to the alarm address and requests that the administrator forward all email from the old storage address to the new storage address. • Could not connect to the project's POP3 server. • Emails were routed to a project and then the project was deleted. In this case, CCA forwards all of the emails for this project to the alarm address. • The agent did not answer an email in time. • The project mailbox received an email from an invalid email address. CCA forwards these emails to the alarm mailbox. • The project received an invalid email from an agent. For example: The agent's email address was invalid. The agent responded to an interaction that had already been answered.
Select an SMTP Group to Send Alarm Notification	Select the SMTP Group to use to send alarm notifications.

4. Click the **Storage** subtab (Figure 3-10).

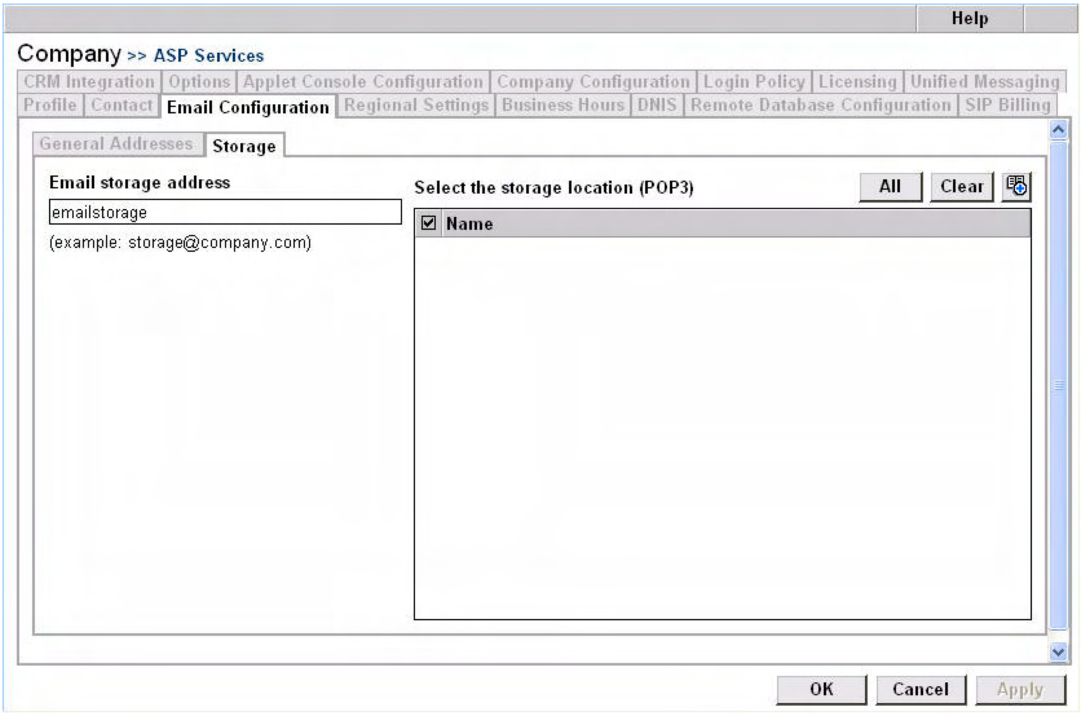

Figure 3-10 Company Email Storage Subtab

5. Using the information in Table 3-4, complete the **Storage** subtab fields.

Table 3-4. Storage Tab Fields and Descriptions

Field	Description
Email storage address	This address is the address agents will see, if you configure the system to conceal the customer's email address from the agent. (Refer to "Show customer email address to Agent" on page 10-70 for more information.) You must also enter an address (in the **Select the storage location** field below. This address must be from an account on the servers you specify.

Table 3-4. Storage Tab Fields and Descriptions

Field	Description
	Even though the agent sees only the address you enter here, CCA sends the agent's response to the customer's true address. The customer sees the email address for the *Project*. **Note:** Do not use an email client to access the CCA email storage address. This prevents the system from accessing the account used to send agent replies to customers.
Select the storage location	Check the POP3 Servers supporting the address you provided for **Email storage address** above.

6. Click **Apply**.

Configuring Company Time Zone and Date Format

Use the **Regional Settings** tab (Figure 3-11) to set the time zone and date format to use on all CCA workstations in your company.

To set a time zone and date format for the company

1. Select **Options** > **Company** > **Regional Settings** tab.
2. From the Date Format drop-down menu, select a date format for the company. CCA uses the selected format when displaying dates on all Agent, Supervisor, and Administrator workstations for the company (unless users override the company settings from their own workstations).
3. From the Time Zone drop-down menu, select a time zone for the company. The company time zone appears on the workstations of all company's Agents, Supervisors, and Administrators (unless the users override the company settings on their own workstations).
4. From the Select a Language drop-down menu, select the language for internal messages used by the company. Internal messages can be:
   - Email alarms from the server.
   - The default language selected for reports.

This company language selection does not affect what agents and supervisors see when they login. Agents and supervisors can select their own language preference each time they login.

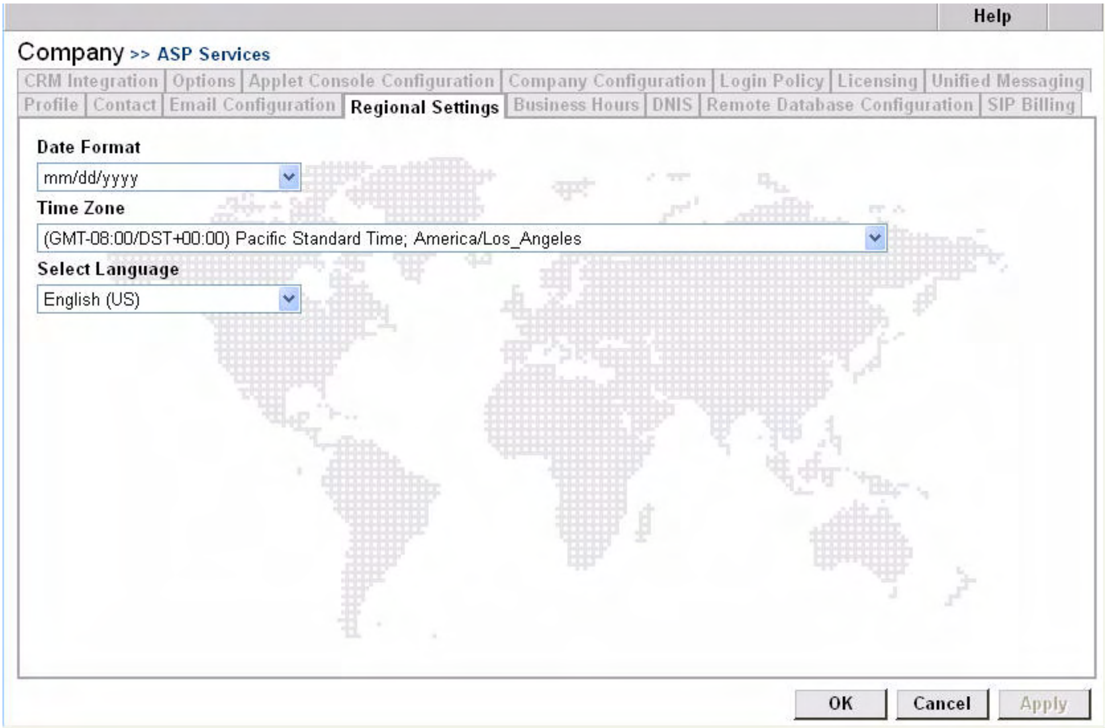

Figure 3-11 Company Regional Settings Tab

5. Click **OK** or **Apply**.

Setting Company Business Hours

Use the **Business Hours** tab (Figure 3-12) to identify the days and times the company is open for business, and the days and times agents are available to handle chat and Web callback requests.

When a Web-based customer attempts to contact your call center during non-business hours, CCA uses the specified business hours to inform the customer that the company is currently closed, and to assist the customer in reaching an agent during open business hours.

To set company business hours

1. Select **Options** > **Company** > the **Business Hours** tab (Figure 3-12).

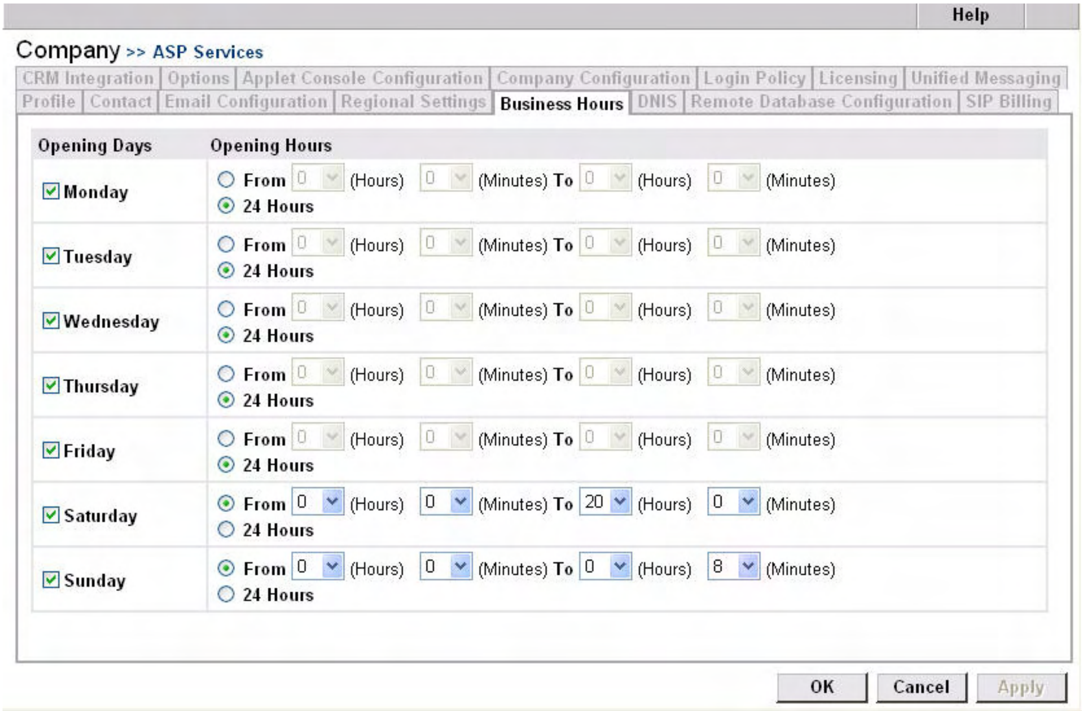

Figure 3-12 Company Business Hours Tab

2. Under Opening Days, check each day when the company is open for business and when agents are available to handle Web callback requests.

3. For each day you check, select the time (hours and minutes) the company opens on that day from the Opening Hours From drop-down menu, or select 24 Hours if the call center is always available for handling chat and Web callback interactions.

4. Identify the time (hours and minutes) the company closes on each day from the To drop-down menu.

5. Click **OK** or **Apply**.

Before agents and supervisors can log in to the company, your network Administrator must add the required servers and resources for the company to the machine hosting your CCA installation.

Creating List of Project Phone Numbers

(Service Provider Edition Only)

If you provide CCA services for a company that handles telephone interactions, you must create a list of telephone numbers reserved for that company's Phone Projects. Company Administrators can then choose from this list of phone numbers when creating Phone Projects.

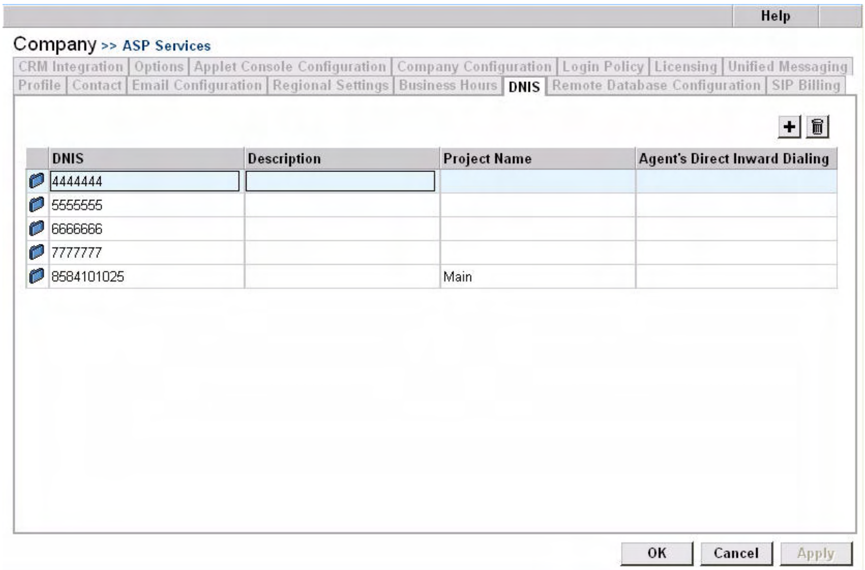

Figure 3-13 Company DNIS Tab

Use the **Company DNIS** tab (Figure 3-13) to supply the reserved phone numbers for handling calls from customers who reach the company's Phone Projects.

To create a list of phone project numbers

1. Select **Options** > **Company** > **DNIS** tab (Figure 3-13).
2. Click [+].

   CCA adds a blank line for adding a DNIS entry.
3. In the **DNIS** column, type a telephone number reserved to handle incoming phone interactions.
4. In the **Description** column, type a description of the projects this phone number supports.
   a. If you assign a DNIS to a project (see “Project Phone Number” on page 10-6) the project name appears in the Project Name column.
   b. If you assign a DNIS to an agent (see “Direct Inward Dialing” on page 6-16) the agent’s name appears in the Agent’s Direct Inward Dialing column.
5. Click **OK**.
6. Repeat steps 3 through 5 until you have added all the phone numbers you compiled in “Question 2: What numbers will telephone-customers dial to reach the call center?” on page 2-2 of the ***CCA Planning Survey***.

Proceed to the next section for information on populating the CCA libraries for a company.

Before agents and supervisors can log in to the company, the network Administrator must add the required servers and resources for the company to the machine hosting the CCA installation.

Using SIP Billing

Call centers use the Billing tab for:

- Making outbound SIP calls.
- Using a billing module that connects to SIP software proxy. The billing module examines the Diversion field of the SIP header to determine how to bill the call.

To use SIP billing

1. Select **Options** > **Company** > **SIP Billing** tab (Figure 3-14).

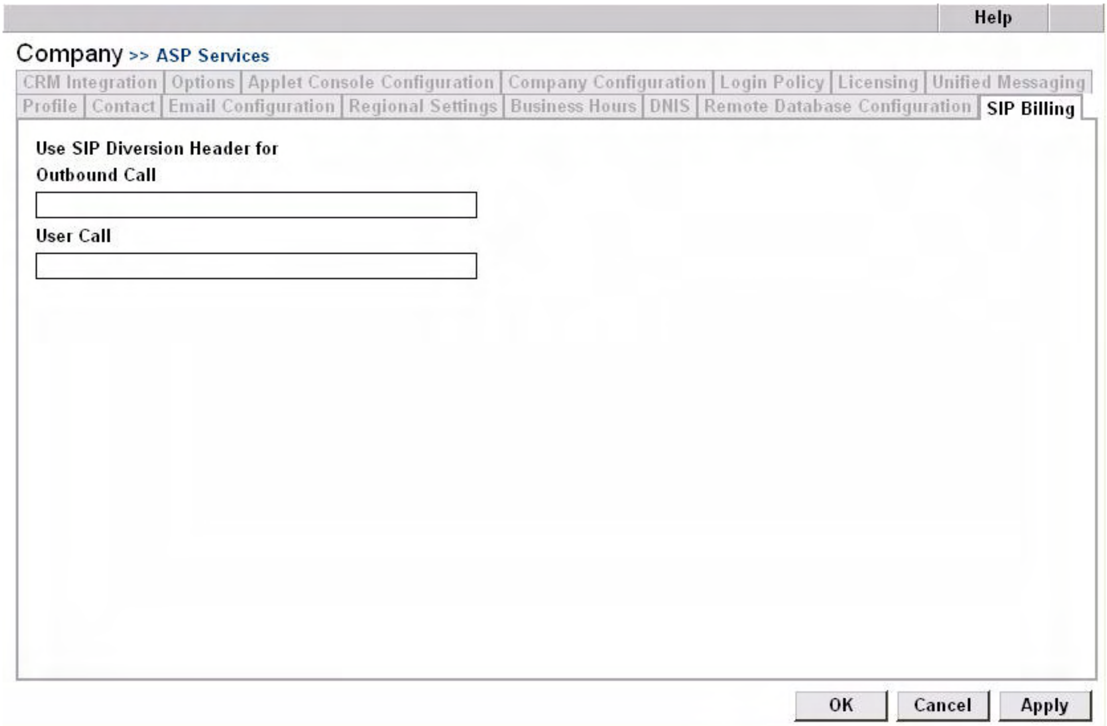

Figure 3-14 SIP Billing Tab

a. If your billing module expects to find a string in the SIP header for Outbound SIP calls, enter that value in the **Outbound Call** field.

and

b. If your billing module expects to find a string in the SIP header for calls that are routed to an agent, enter that value in the **User Call** field.

2. Click **OK**.

Remote Database Configuration

CCA uses a Web Services API that allows coding for unique Web client applications. Use the Remote Database Configuration tab to give your custom Web applications access to selected tables in the CCA database for synchronization.

You can load a sound file anytime. However, for the sound file to play, you ***must*** check the **Play Sound** option.

To provide custom Web applications access to CCA database tables

1. You must login as a Network Administrator for the Remote Database Configuration tab to be available.
2. Select **Options** > **Company** > **Remote Database Configuration** tab (Figure 3-15).
3. Click the **Enable Remote DB** check box.

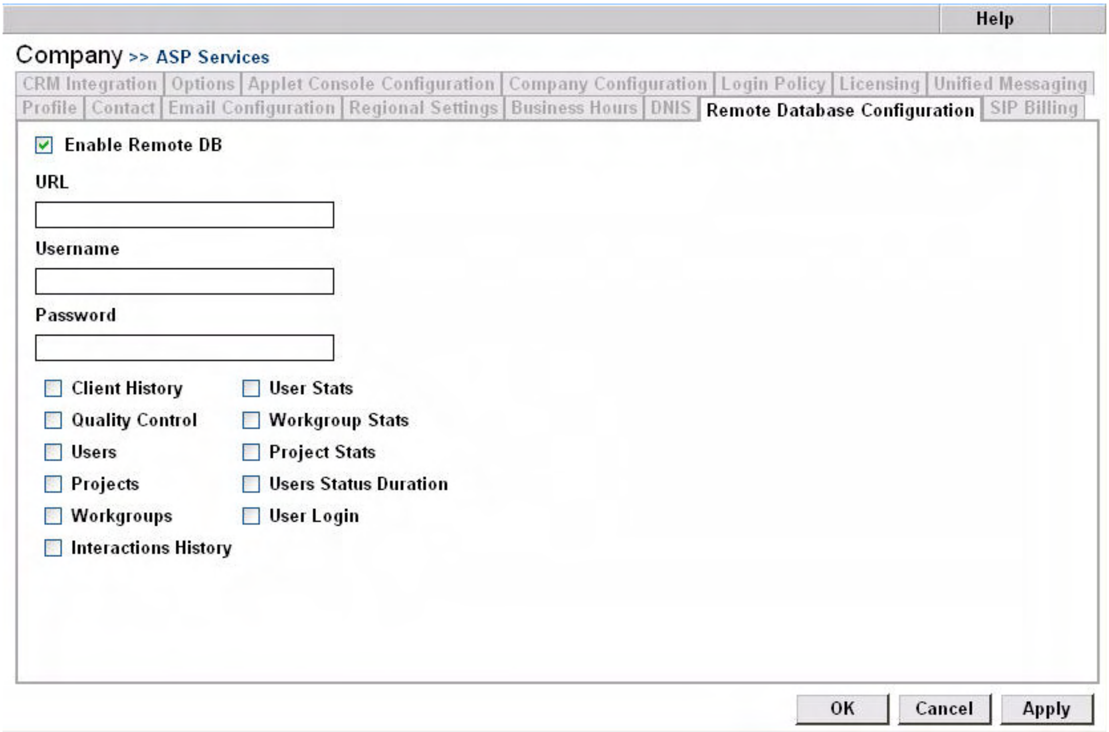

Figure 3-15 Remote Database Configuration Tab

4. Using the information in Table 3-5, complete the Remote Database Configuration fields.

Table 3-5. Remote Database Configuration Fields and Descriptions

Field	Description
URL	The URL of the CCA Web server.
Username	Type a username and password to create a special account, used solely for giving a client application very limited access to the CCA database. **Note**: This "user" cannot login to any CCA application and does not appear in any reports.
Password	The password for the client application to use to access the CCA database.
Client History	Allows synchronization of the Client History table.
Quality Control	Allows synchronization of the Quality Control table.

Table 3-5. Remote Database Configuration Fields and Descriptions

Field	Description
Users	Allows synchronization of the Users table.
Projects	Allows synchronization of the Projects table.
Workgroups	Allows synchronization of the Workgroups.
Interaction History	Allows synchronization of the Interactions table.

5. Click **OK** (or **Apply**).

CRM Integration

When invoking a Web page or Win32 application, CCA passes it several parameters containing information about the interaction. (Refer to the Technical Notes appendix for more details about these parameters.)

The **CRM Integration** tab (Figure 3-16) has two subtabs:

- The **Custom** tab for:
    - Creating a custom tab in Interaction Manager and then loading a unique Web page into that custom tab
- The **External Application** tab for:
    - Launching a separate browser on the agent's machine and then loading a unique Web page into that browser,

  or

    - Launching a Win32 application on the agent's machine.

To integrate CRM

1. Select **Options** > **Company** > **CRM Integration** > **Custom** subtab (Figure 3-16).
2. Click **Enable custom tab in Interaction Manager**.

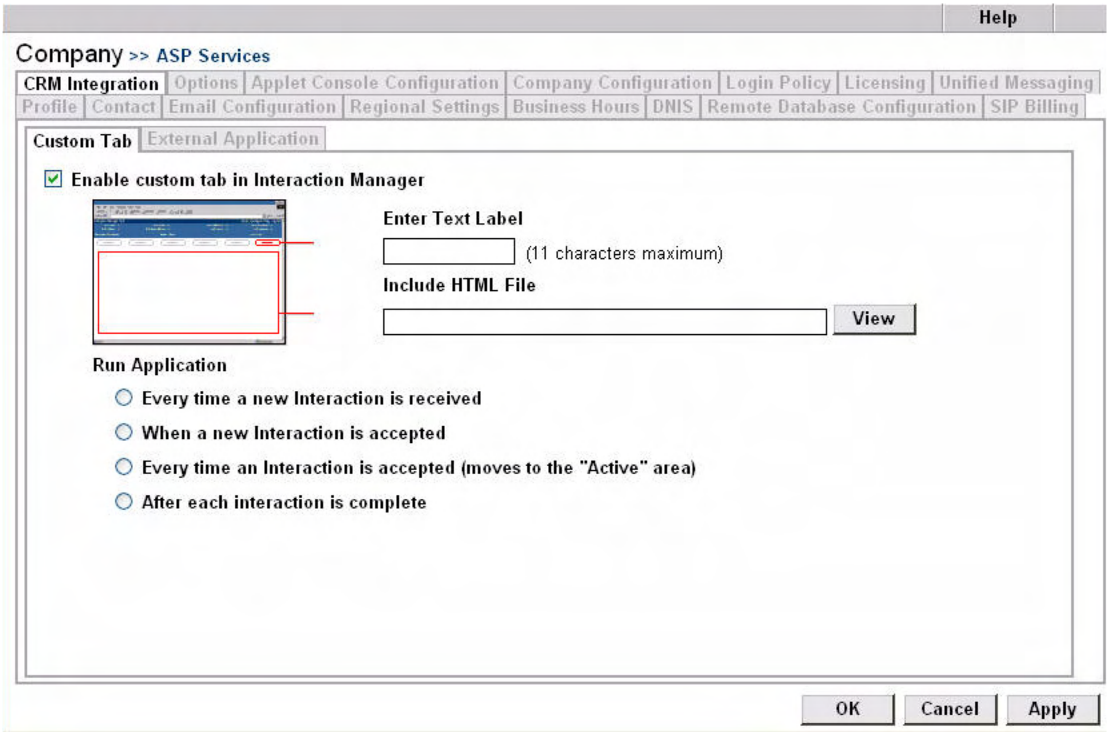

Figure 3-16 CRM Integration - Custom Subtab

3. Using the information in Table 3-6, complete the fields and make selections.

Table 3-6. CRM Integration - Custom Subtab Fields and Descriptions

Field	Description
Enable custom tab in Interaction Manager	Click this check box so that your custom tab will appear in Interaction Manager. The bottom of your custom tab will have a frame and the Web page that you enter in this field will appear in that frame. **Note**: There are additional ways to load an HTML page from a custom tab in Interaction Manager.
Enter Text Label	Type the name of the tab that will appear in Interaction Manager.

Table 3-6. CRM Integration - Custom Subtab Fields and Descriptions

Field	Description
Include HTML File	Enter a URL with a protocol, server, and a filename. For example: https://a_server/a_path https://a_server/a_path/a_file.html CCA supports any protocol that the browser supports (http, https, FTP, and so on). **Note**: If the URL string does not contain a protocol, Interaction_Manager automatically adds "**http://**" as a default prefix upon receiving the URL. In addition, since IM adds a default prefix, it does not appear in Administration Manager.
Run Application	These radio buttons let you choose when your HTML file will load into the custom tab in Interaction Manager. • **Every time a new interaction is received**: When IM offers an interaction to an agent, IM loads the HTML file into the custom tab. • **When a new interaction is accepted**: When the agent clicks the Accept Interaction button in IM, IM loads the HTML file into the custom tab. Furthermore, IM will not reload the HTML page if the agent puts the interaction on Hold (or some other action) and then moves the interaction back into the Active Area. • **Every time an interaction is accepted**: When the agent clicks the Accept Interaction button in IM, IM loads the HTML file into the custom tab. Furthermore, IM will reload the HTML page if the agent puts the interaction on Hold (or some other action) and moves the interaction back into the Active Area. • **After each interaction is complete**: When the interaction is disconnected, IM loads the HTML file into the custom tab. Furthermore, when IM loads the HTML, it passes everything known about the interaction (such as the interaction type, contact information, and so forth) as parameters in the URL string.

4. Click the **External Application** tab (Figure 3-17).

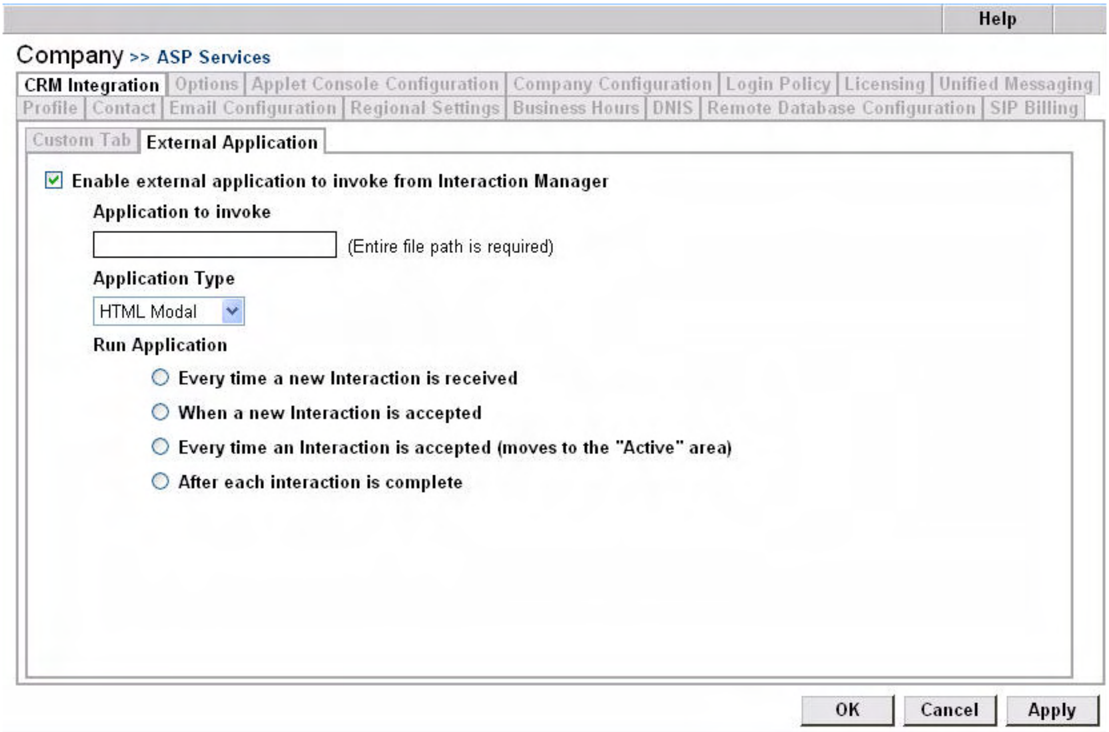

Figure 3-17 CRM Integration - External Application Subtab

5. Click the **Enable external application to invoke from Interaction Manager** check box.

6. Using the information in Table 3-7, complete the fields and make selections.

Table 3-7. External Application Subtab Fields and Descriptions

Field	Description
Application to Invoke	**If you are loading an executable**: • An executable is any file that can start in a Windows shell (bat, exe, and so forth). • The executable must already be installed on the agent's machine. • Type the full path (including the executable name) or type just the executable name (if the location is already in the agent's PATH variable).

Table 3-7. External Application Subtab Fields and Descriptions

Field	Description
	If you are loading an HTML page: Type the full path to the page. Configure a custom tab in Interaction Manager to load an HTML page in two ways: • Use the Company > CRM Integration > **Custom Tab** so that IM loads the HTML page into a frame at the bottom of the custom tab. • Use the Company > CRM Integration > **External Application Tab** so that IM will spawn a browser process and load the HTML page. You can also choose whether the browser process is modal or non-modal. (See the next field, Application Type, below.)
Application Type	From this drop-down menu, select: • **HTML Modal**: Select this setting if you entered the path of an HTML file in the Application to Invoke field and you want to force the agent to close the browser. In this case: IM loads the HTML page by spawning an external browser. The browser window stays in the foreground and the agent cannot use IM until after closing the browser window. • **HTML Window**: Select this setting if you entered the path of an HTML file in the Application to Invoke field and you want the agent to be able to keep the window in the background. In this case: IM loads the HTML page by spawning an external browser. and the agent can use a mouse (or Alt-tab) to go back to IM, sending the browser window to the background. • **Win32 Window**: Select this setting if you entered the path of an executable file in the Application to Invoke field and you want IM to launch the executable file.
Run Application	These radio buttons let you choose when IM will load the HTML file or executable into the custom tab. • **Every time a new interaction is received**: When IM offers an interaction to an agent, IM loads the HTML file or executable into the custom tab.

Table 3-7. External Application Subtab Fields and Descriptions

Field	Description
	• **When a new interaction is accepted**: When the agent clicks the Accept interaction button in IM, IM loads the HTML file or executable into the custom tab. Furthermore, IM will not reload the HTML page if the agent puts the interaction on Hold (or some other action) and then moves the interaction back into the Active Area. • **Every time an interaction is accepted**: When the agent clicks the Accept interaction button in IM, IM loads the HTML file or executable into the custom tab. Furthermore, IM reloads the HTML page if the agent puts the interaction on Hold (or some other action) and then moves the interaction back into the Active Area. • **After each interaction is complete**: When the interaction is disconnected, IM loads the HTML file or executable into the custom tab.Furthermore, when IM loads the HTML page or executable, it passes everything known about the interaction (such as the interaction type, contact information, and so on) as parameters in the URL string.

Options

When logging in as a Network Administrator, use the **Options** tab (Figure 3-18) to enable or disable a number of features for the companies for which you provide service.

To enable or disable features

1. You must login as a Network Administrator to access the Options tab.

2. Click **Options** > **Company** > **Options** tab (Figure 3-18).

Changes in the Options tab may not take effect until you (and other Admins) log out and log back in.

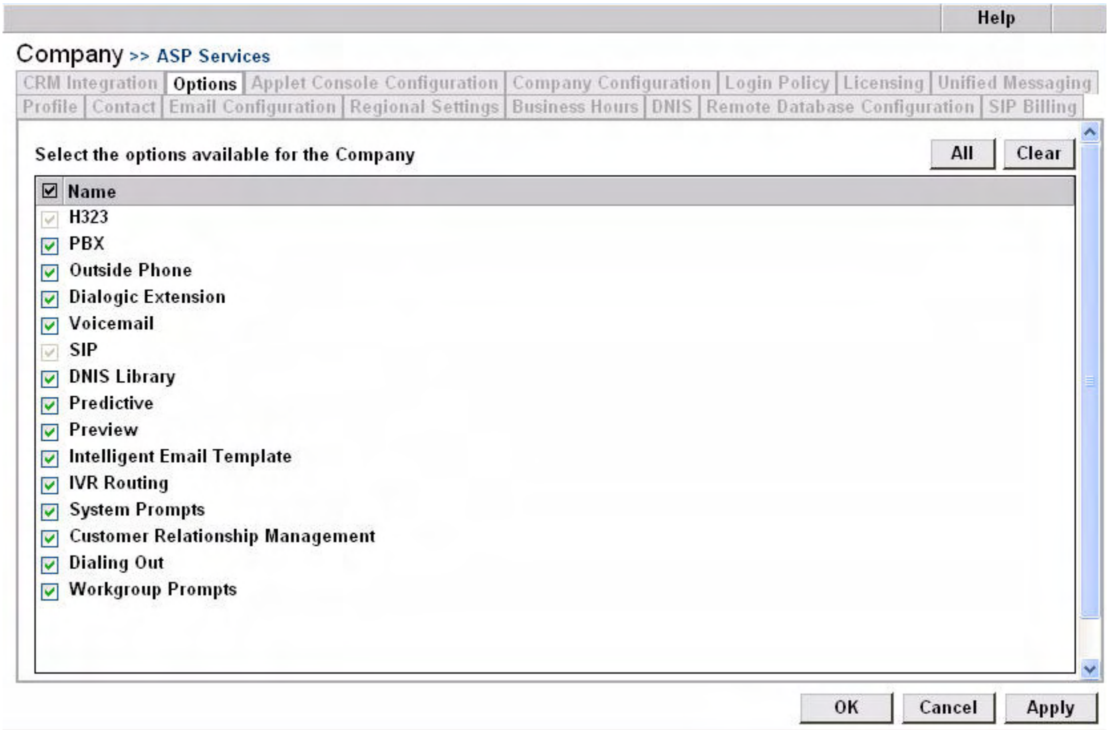

Figure 3-18 Options Tab

3. Using the information in Table 3-8, complete the field selections.

Table 3-8. Options Tab Fields and Descriptions

Field	Description
H323	If unchecked, the phone type H323 will not appear in Options > Agents > Phone > Select Type of Phone.
PBX	If unchecked, the phone type PBX will not appear in Options > Agents > Phone > Select Type of Phone.
Outside Phone	If unchecked, the phone type Outside Phone (Remote Extension) will not appear in Options > Agents > Phone > Select Type of Phone.
Dialogic Extension	If unchecked, the phone type Dialog Analog Extension will not appear in Options > Agents > Phone > Select Type of Phone.

Table 3-8. Options Tab Fields and Descriptions

Field	Description
Voicemail	If unchecked, the **No Phone (Voicemail Only)** radio button will be removed from Options > Agents > Phone tab. This radio button is used to send all calls directly to the Agent's voicemail.
SIP	If unchecked, the phone type SIP will not appear in Options > Agents > Phone > Select Type of Phone.
DNIS Library	If unchecked, the Options > Company > DNIS tab will not appear. The Project phone number (Options > Projects > Phone > Project Phone Number) will not be able to use the DNIS library. You will have to manually enter a Project phone number.
Predictive	If unchecked, all features related to Predictive dialing will be removed from the product, including the Options > Projects > Predictive tab and all Predictive reports.
Preview	If unchecked, all features related to Preview dialing are removed from the product.
Intelligent Email Template	If unchecked, removes the Libraries > Intelligent Email Template Navbar item.
IVR Routing	If unchecked, removes the Options > Project Menus > Touch Tones tab > Route to IVR Server radio button.
System Prompts	If unchecked, removes all features related to System Prompts, including the System Prompts Navbar heading.
Customer Relationship Management	If unchecked, removes the Options > Company > CRM tab.
Dialing Out	If unchecked, removes the Options > Company > Company Configuration tab > Allow Outbound Calls list box.
Workgroup Prompts	If unchecked, removes the Options > Projects > Workgroups Prompts tab.

Applet Console Configuration

The **Applet Console Configuration** tab (Figure 3-19) contains settings mainly for advanced troubleshooting. This tab is only available to Network Administrators.

To perform advanced troubleshooting

1. Login as a Network Administrator.
2. Click **Options** > **Company** > **Applet Console Configuration** tab (Figure 3-19).

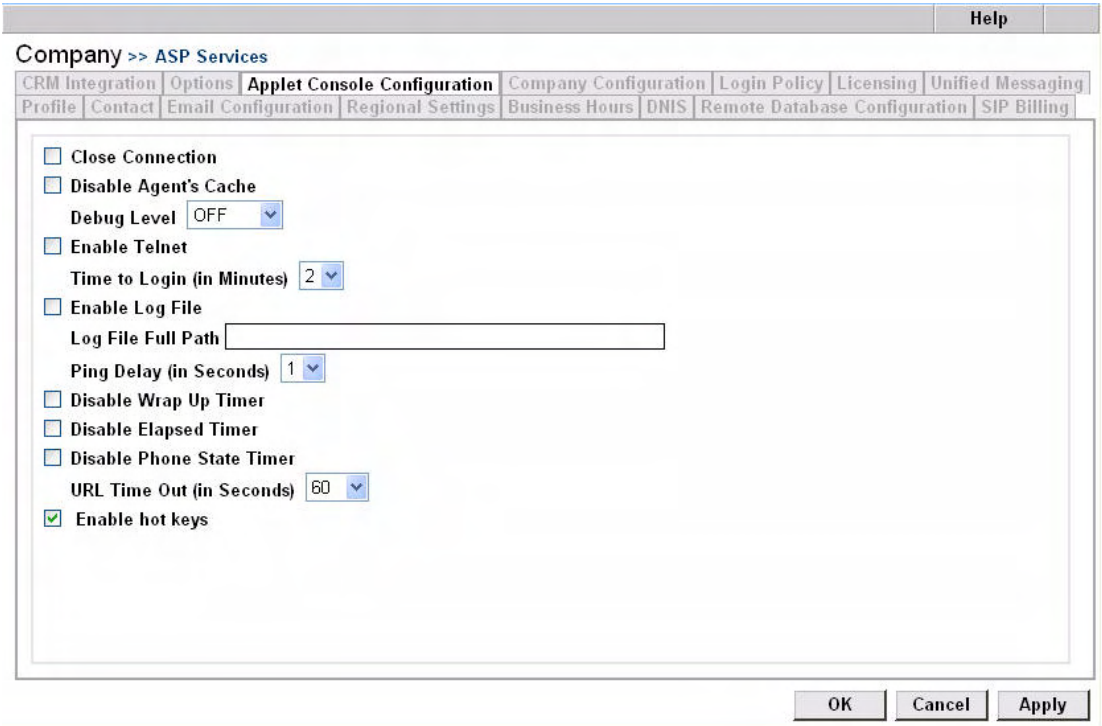

Figure 3-19 Applet Console Configuration

3. Using the information in Table 3-9, complete the fields.

Table 3-9. Applet Console Configuration Fields and Descriptions

Field	Description
Close Connection	CCA applications (Administration Manager, Interaction Manager, Supervision Manager, and so on) occasionally connect to the CCA Web server to determine if there are any messages (interactions, statistics updates, and so forth). If the Close Connection box is **not** checked, the applications will continue to use the same HTTP connection to the web server forever. If this box **is** checked, the connection will be re-established every 60 requests
Disable Agents Cache	When a user logs into IM or SM, CCA downloads information (about status, workgroups, users, URLs, outcomes, and so forth) from the database so that it appears in the application. While the user is logged in, this information is in memory. However, when the user logs out, the application writes all the data to temporary files on the user's hard drive. CCA does this so that the next time the user logs in, the application only needs to download new or changed information (like a new project or outcome, or a deleted or edited item) rather than downloading everything. When you check this box, CCA downloads all information needed by the application (from the database) each time the user logs in. **Please note:** This can consume a large amount of resources on both the server and the user's machine.

Table 3-9. Applet Console Configuration Fields and Descriptions

Field	Description
Debug Level	From the drop-down, select the level of debug information to generate. View debug information from a file, Telnet window, or the Java Console. Select from: • **Off**: No debug information is generated. • **Debug**: Most debugging information about the system is generated. • **Info**: Minimal debug information is generated. • **Error**: Only error information is generated. • **Fatal**: Only information about fatal errors is generated. • **All**: All debug and error information is generated. **Note**: If you choose to send the information to the Java Console or Telnet, the **All** option will consume most of your memory and CPU.
Enable Telnet	To view debug information in a Telnet window: • Check the **Enable Telnet** check box. • Click **OK** (or **Apply**). • Start a Telnet session: “telnet <hostname> <port>” where: <hostname> = the name of the machine where the client application is running. (For example, the name of the machine where Administration Manager is running.) <port> =: 48000 for Interaction Manager 48001 for Supervisor Manager 48002 for Administration Manager
Time to Login (in minutes)	From the drop-down menu, select the time IM will wait before down loading all needed information from the database and logging into the IM server. This means, if the login takes more than this time, IM automatically logs out.
Enable Log File	Select this check box to write debug information to a file. You must also enter a log file path and the path must include the filename. Note: The system creates folders if they do not exist. Note: The system writes a debug file to this path on every agent’s machine.

Table 3-9. Applet Console Configuration Fields and Descriptions

Field	Description
Ping Delay in Seconds	CCA applications (Administration Manager, Interaction Manager, Supervision Manager, and so forth) occasionally connect to the CCA Web server to determine if there are any messages (interactions, statistics updates, and so on). The Ping Delay in Seconds is the time the applications will wait before sending their next request to the Web server.
Disable Wrap Up Timer	If checked, the wrap up timer does not appear to agents in IM. (This prevents flicker on some screens.)
Disable Elapsed Timer	If checked, the Interaction timer does not appear to the agent in IM. (This prevents flicker on some screens.)
Disable Phone State Timer	This is the animated phone icon that appears in the Interaction Manager Information Bar. If checked, the animated icon will not be displayed to the Agent. The Agent will always see the on-hook icon. This can prevent flicker on some screens.
Allow Multi ACD Interaction	Select this check box to allow multi ACD (automatic call distributor) incoming interactions.
URL Timeout (in Seconds)	From the drop-down menu, select the time that the application (Administration Manager, Interaction Manager, and so forth) will wait for a response from the Web server before killing the connection and re-sending the request.
Enable Hot Keys	Check this box to enable CCA's hot-keys. If unchecked, CCA's hot-keys do not work and will, therefore, not conflict with any third-party application hot keys.

4. After changing the setting for any of the check boxes, click the **OK** (or **Apply**) button. A dialog box appears with two options:

   a. **Don't apply the new policy to every Agent**:

      This changes the company default setting. Only agents who use the company default setting are affected (Options > Agents > Controls and Restrictions > Allow Outbound Calls list box > Use Company's Default).

b. **Apply the new policy to every Agent**:

This changes the company default setting **and** the setting for all agents in the Options > Agents > Controls and Restrictions > Allow Outbound Calls list box.

For example, if the agent setting is “Always” and you change the Company setting to “Disable,” and select **Apply the new policy to every Agent**, then the agent setting changes to “Disable.”

Company Configuration

The **Company Configuration** tab (Figure 3-20) allows you to add or remove several features to Interaction Manager and Supervisor Manager.

To add or remove company configuration features

1. You must login as a Network Administrator for this option to become visible.

2. Select **Options** > **Company** > **Company Configuration** tab (Figure 3-20.)

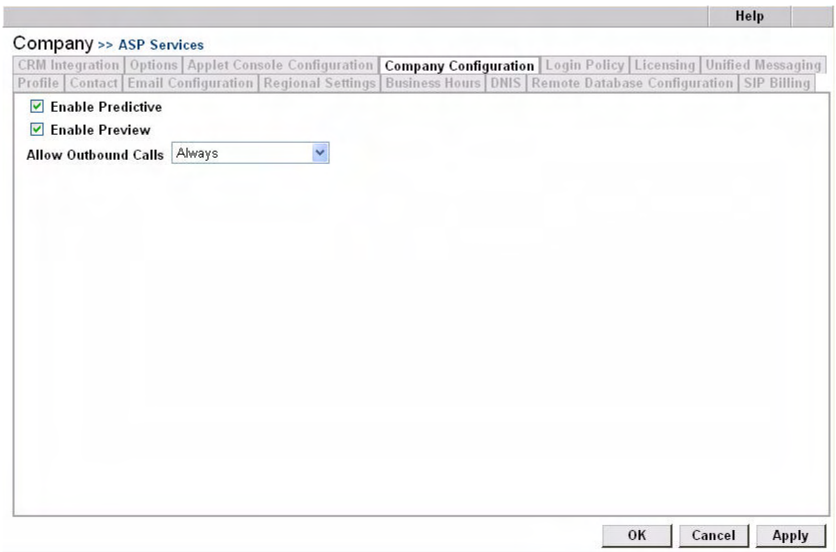

Figure 3-20 Company Configuration Tab

3. Using the information in Table 3-10, complete these fields.

Table 3-10. Company Configuration Fields and Descriptions

Field	Description
Enable Predictive	Check to make the Predictive tab visible to agents and supervisors at login.
Enable Preview	Check to make the Preview tab visible to agents and supervisors at login.
Allow Outbound Calls	From the drop-down menu, select outbound call options: • **Always**: The agent can always make outbound calls (including external calls, PBX, IP Call, Connect To Server, phone links in the Contact tab, Auto Redial, and so on). • **Enable with Interaction**: If the Agent has an active interaction of any type, they can make outbound calls for the duration of the interaction. • **Disable**: The agent can never make any type of outbound call. **Note:** As soon as you apply a change, CCA dynamically updates both SM and IM immediately.

4. Click **OK** (or **Apply**).

   If you made changes, a dialog box appears with two options:

   - **Don't apply the new policy to every Agent**:

     This changes the company default setting. Only agents who use the company default setting are affected (Options > Agents > Controls and Restrictions > Allow Outbound Calls list box > Use Company's Default.)

   - **Apply the new policy to every Agent**:

     This changes the company default setting **and** the setting for all agents in the Options > Agents > Controls and Restrictions > Allow Outbound Calls list box.

     For example, if the agent setting is "Always," and you change the Company setting to "Disable," and then select **Apply the new policy to every Agent**, the agent setting changes to "Disable."

Login Policy

Use the Login Policy tab to enforce some password control over anyone who logs into Administration Manager, Interaction Manager, and Supervision Manager or to authenticate CCA users on an already configured LDAP server.

To set a login policy

1. Click **Options** > **Company** > **Login Policy** tab (Figure 3-21).

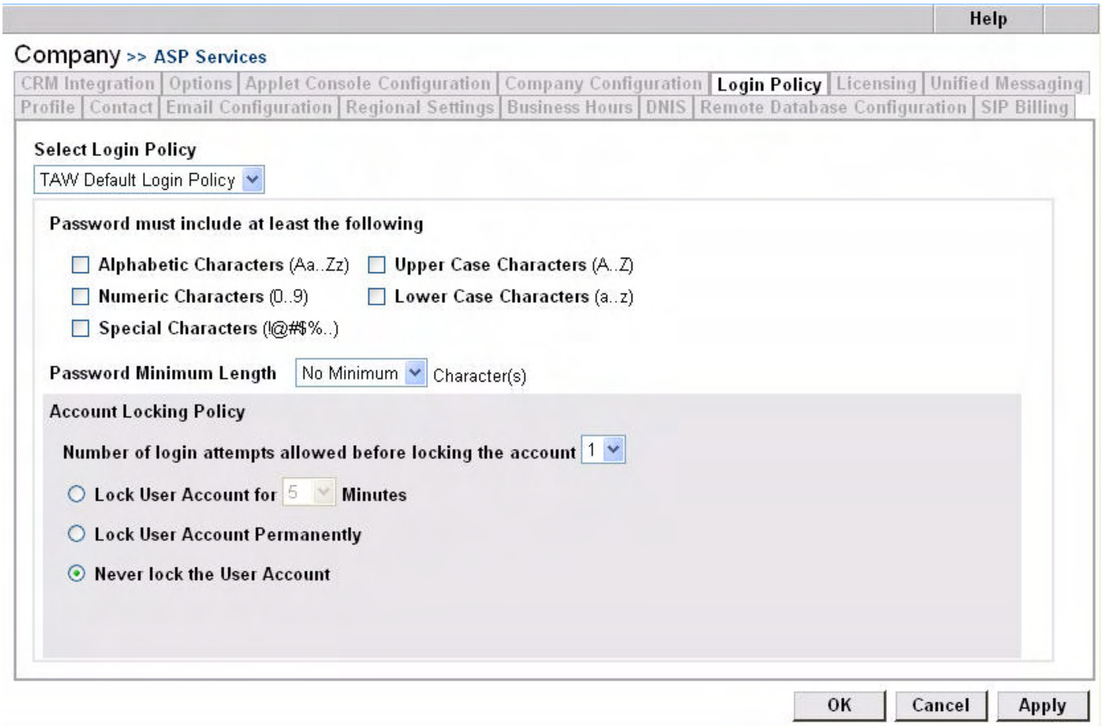

Figure 3-21 Login Policy - TAW Default Login Policy

2. Using the information in Table 3-11, complete the selections.

Table 3-11. Login Policy Fields and Descriptions

Field	Description
Select Login Policy	From the drop-down menu, select a login policy from: • Select the **TAW Default Login** option to enforce some password control over anyone who logs into AM, IM, and SM. (For example, the password required length, required characters, lockout policy, and so forth.) • Select the **LDAP Authentication** option to authenticate CCA users on an already configured LDAP server. When you select this option, different fields appear. Skip “To complete the LDAP authentication policy” below.
Password must include at least the following	**Alphabetic Characters**: Check so that the user’s password must contain at least one character in the set A-Z (uppercase or lowercase). **Numeric Characters**: Check so that the user’s password must contain at least one character in the set 0-9. **Special Characters**: Check so that the user’s password must contain at least one special character. A special character is any character that is not numeric or alphabetic (such as “!@#$%) and includes math symbols, punctuation, braces, parentheses, slashes, and so on. **Upper Case Characters**: Check so that the user’s password must contain at least one uppercase character in the set A-Z. **Lower Case Characters**: Check so that the user’s password must contain at least one lowercase character in the set a-z.
Password Minimum Length	From the drop-down list, select a minimum password length forcing users to create a password with at least this many letters.

Table 3-11. Login Policy Fields and Descriptions

Field	Description
Number of login attempts before locking the account	From the drop-down menu, select the number of attempts to give a user (to enter a correct username and password) before locking the account so that the user can no longer login. Note: How the system unlocks the user's account depends on which locking option you select in the next check boxes.
Lock User Account for [ ] Minutes	Check this option and, from the drop-down list, select the maximum time the user must wait before being able to login to the account again, as usual.
Lock User Account Permanently:	Check this option so that when the number of login attempts is reached, the user will not be able to login to the system until you unlock their account.
Never Lock the User Account	Check this option so there will be no limit on the number of incorrect username/password combinations that a user can enter.

3. Click **OK** (or **Apply**).

To restore a user's access after a permanent lock out

Follow these steps to restore a user's access to the system if they have been permanently locked out:

1. Change the lockout policy to **Never Lock the User Account** and click **OK** (or **Apply**).

2. Ask the user to login again. (They should be able to access the system as usual.)

3. Change the lockout policy back to the setting you prefer.

To complete the LDAP authentication policy

- If you select the **LDAP Authentication** policy, different fields appear on the screen (Figure 3-22).

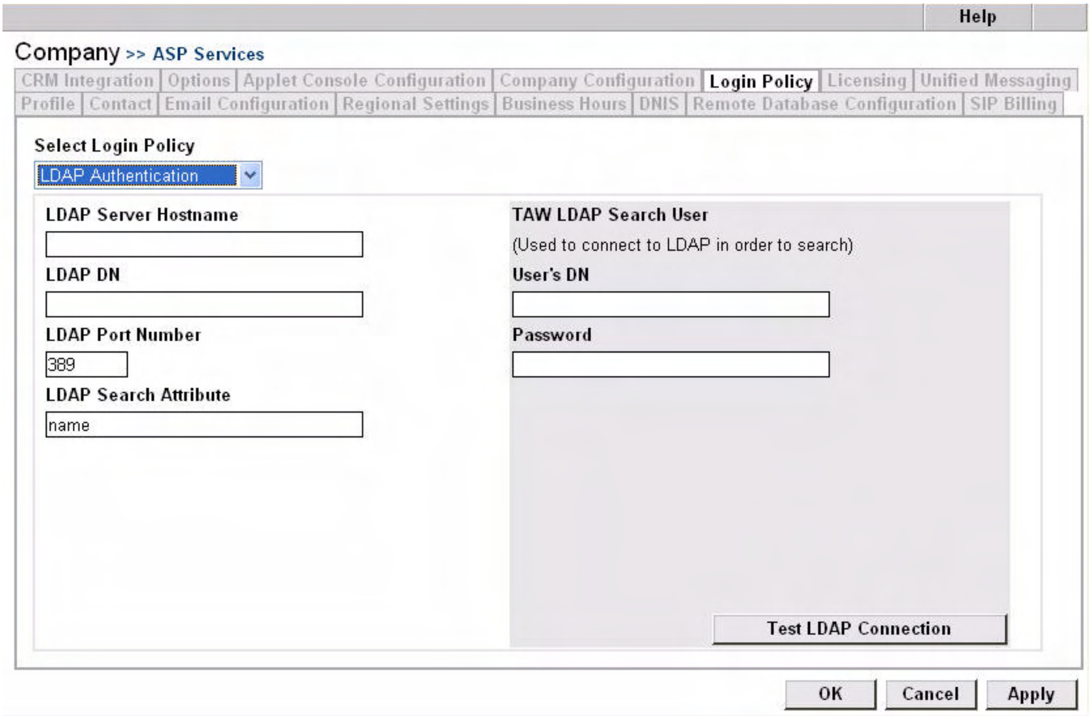

Figure 3-22 LDAP Authentication - Additional Fields

4. Using the information in Table 3-12, complete these fields.

Table 3-12. LDAP Authentication Fields and Descriptions

Field	Description
LDAP Server Hostname	Type the host name of the network machine that is running an LDAP server.
LDAP DN	Type the distinguished name of the LDAP server. **Examples of the field syntax**: • ou=Admin,ou=Global Preferences,ou=telephonyatwork.com,o=NetscapeRoot • DC=telephonyatwork,DC=com
LDAP Port Number	Type the port the LDAP server uses.
LDAP Search Attribute	Type the field where a user exists on the LDAP server.

Table 3-12. LDAP Authentication Fields and Descriptions

Field	Description
TAW LDAP Search User	**User's DN**: Type the distinguished name of the user you created on the LDAP server to allow CCA applications to be LDAP authenticated. **Password**: Type the password of the user you created on the LDAP server to allow CCA applications to be LDAP authenticated.
Test LDAP Connection (button)	Click this button so that Administration Manager will test connect to your LDAP server using the information you have provided. (If the test fails, go to "If the Test LDP Connection fails" below. **Note: When using LDAP Authentication, you must click this Test LDAP Connection button before logging out.**

If the Test LDP Connection fails

1. Change the LDAP information that you entered so that a successful test connection is made,

   or

   Return to using the **TAW Default Login Policy** until you determine what is causing a problem with the LDAP information.

2. If you log out of Administration Manager after the test fails, CCA forces you to manually edit the CCA database before you can log back into Administration Manager.

To add agents when using LDP authentication

See "Password" on page 6-5 for how to add agents when you use LDAP authentication.

Licensing

If you have the **Service Provider Edition** of Administration Manager, use the **Licensing** tab (Figure 3-23) to control:

- The maximum number of allowable simultaneous interactions for a company.
- The maximum number of simultaneous users a company can have logged in.
- The maximum number of channels Predictive Campaigns are allowed.

1. Log in as a Network Administrator to edit fields or as a System Administrator to only view the fields.

2. Click **Options** > **Company** > **Licensing** tab (Figure 3-23).

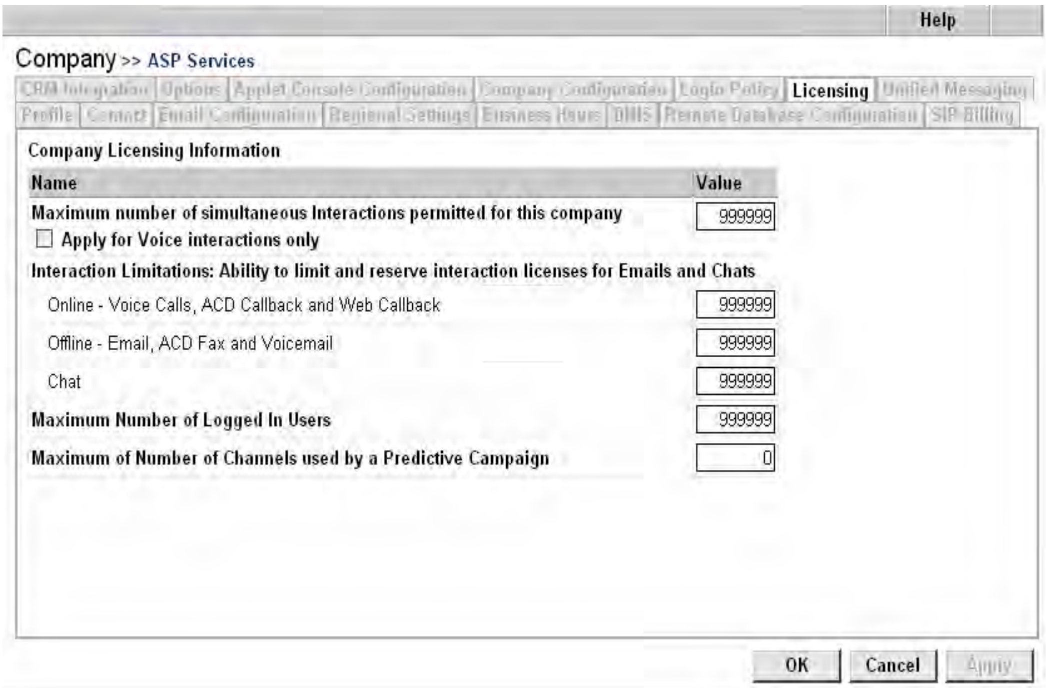

Figure 3-23 Licensing Tab

3. Using the information in Table 3-13, complete these fields.

Table 3-13. Licensing Tab Fields and Descriptions

Field	Description
Maximum Number of Simultaneous Interactions Permitted for this Company.	For each company that you provide service, type the maximum number of interactions the company can have at the same time.
Apply for Voice Interactions Only	Leave this box **unchecked** to tell CCA to count all interactions when calculating the total for the previous field. For example, if the previous field value is 400, then CCA allows the company a total of 400 Interactions of any kind at the same time. **Check** this box to give the company unlimited non-call interactions while still setting a limit on their call interactions. The company can have as many fax, voicemail, email, and chat interactions as they want at the same time, but can only have a limited number of call Interactions at the same time (ACD Call, Inbound/Outbound Extension, Direct Inbound/Outbound).
Interaction Limitations: Ability to limit and reserve interaction licenses for Emails and Chats	You can limit or reserve license “slots” for online, offline, and chat interactions. The limitations are by company and defined by NetAdmin permission. These thresholds, in combination with the Peak Interactions Report, allow you to better track and allocate your system licenses. Type the maximum number of interactions the company can have at the same time for Online (voice calls, ACD callback, and Web callback), Offline (email, ACD fax, and voicemail), and Chat.
Maximum Number of Logged in Users	Type the maximum number of agents and supervisors the company can have logged in at the same time. **Note**: CCA does not include Administrators in the count.

Table 3-13. Licensing Tab Fields and Descriptions

Field	Description
Maximum Number of Channels Allowed to be Used by a Predictive Campaign	Type the maximum number of channels a Predictive Campaign can use. (This limits the impact Predictive dialing has on channel use.)

4. Click **OK** (or **Apply**).

Unified Messaging

For fast access to voicemails and for more flexible functions, you can choose to store voicemail messages as wave files on your local drive; using an FTP Server to store the fields and the database to store the information and status of the voice mail.

1. Log in as a Network Administrator to edit fields or as a System Administrator to only view the fields.

2. Click **Options** > **Company** > **Unified Messaging** tab (Figure 3-24).

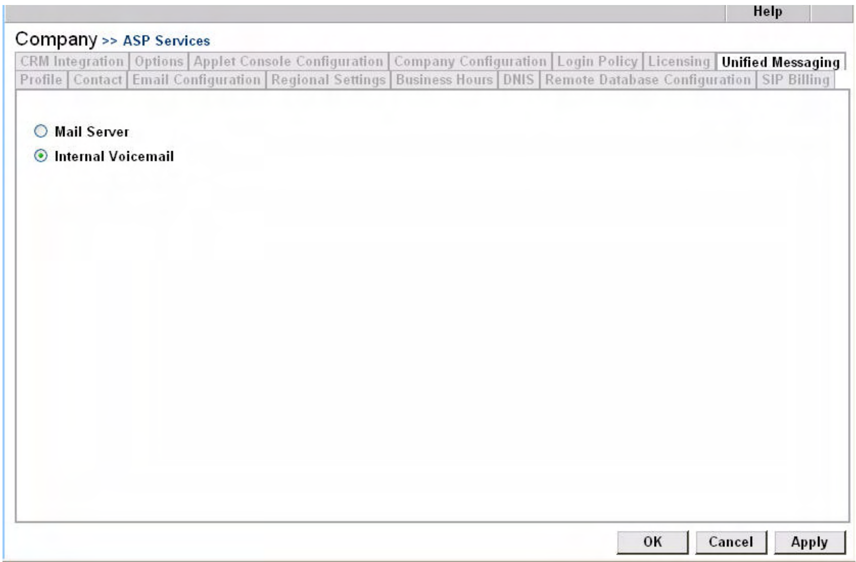

Figure 3-24 Unified Messaging Tab

3. Select how to store voicemails as the default for the entire company:

   - Click **Mail Server** to store voice mails on the Network Email Server or

   - Click **Internal Voicemail** to store voicemails locally

4. Click **OK** (or **Apply**).

You can also identify how to store voicemails at the agent level. See **Unified Messaging** tab on page 6-26.

Finding a Company

(***Service Provider Edition Only***)

If you provide call center services for several companies, use the Administration Manager Company List search tool to quickly locate a company definition from a large list.

To search for a company definition

1. Login to the Administration Manager (see “Starting and Logging In” on page 3-3).

   The Company List screen (Figure 3-25) appears.

Figure 3-25 Company List Screen

2. Perform a or b:

   a. In the character bar above the company list (**A B C D**, and so on), click the first character of the company name.

   or

b. In the Find a Company text box, enter as much of the company's name as you can and then click **Go**.

CCA lists all companies beginning with the character you clicked or beginning with the text you entered in the Find a Company text box.

To manipulate columns of information

1. To sort a list based on column contents, click a column header.
2. To restore the list so that it displays all companies, click **Remove Filter**.
3. To traverse the list, click the controls at the bottom of the company list.
4. To limit the number of companies in the list, from the numeric drop-down menu, select the maximum number of company definitions to display.
5. Use the information in Table 3-14 for additional ways to manipulate the results.

Table 3-14. Company List Results

Click...	To Display...
<<First	Click to go to the beginning of the company list.
<Previous	Click to go to the previous group of company definitions (based on the maximum number to display).
Next>	Click to show the next group of company definitions (based on the maximum number to display).
Last>>	Click to go to the end of the company list.

4

Creating CCA Libraries

CCA Libraries help set up call centers, help agents work more efficiently, and help call centers run more smoothly.

In some cases, CCA Libraries represent your company resources (like POP3 servers or departments). In other cases, CCA Libraries consist of settings (like Prefix Routing Patterns) or information (such as custom statuses or faxes). In all cases, create your libraries so that you can use them in other parts of the program (such as when setting up your agents, workgroups, and projects).

For example, when you set up an agent for email, Administration Manager requires a POP3 server and an SMTP group for that agent. So before setting up an agent's email, you must create at least one record (or object) in:

- Libraries > POP3 Servers
- Libraries > SMTP Servers
- Libraries > SMTP Groups

In most cases, creating libraries is extremely easy. However, you may need information from other people in your company, such as agent supervisors or your IT staff.

Service Provider Edition Users: Before creating libraries, you must select a company. Click the **Back to List of Companies** link and double-click on a company name.

Creating an Agent Skills Library

Agent skills are the abilities each agents possess allowing them to handle interactions coming into the call center. CCA matches the needs of the caller with the skills of available agents, and routes the interaction to the agent most qualified to handle the interaction.

For example, if your call center handles callers who speak French and Spanish in addition to English, you might create two agent skills (“Speaks French” and “Speaks Spanish”) to supplement the ability to speak English, which all your agents possess. Thus, when a Spanish-speaking caller reaches the call center, CCA routes the caller to the available agent with the highest score for the “Speaks Spanish” skill.

To create agent skills

1. Click **Options** > **Skills**.

   The Skills screen (Figure 4-1) opens.

Figure 4-1 Skills Screen

2. Click **Add**.

   The Add Skill screen (Figure 4-2) opens.

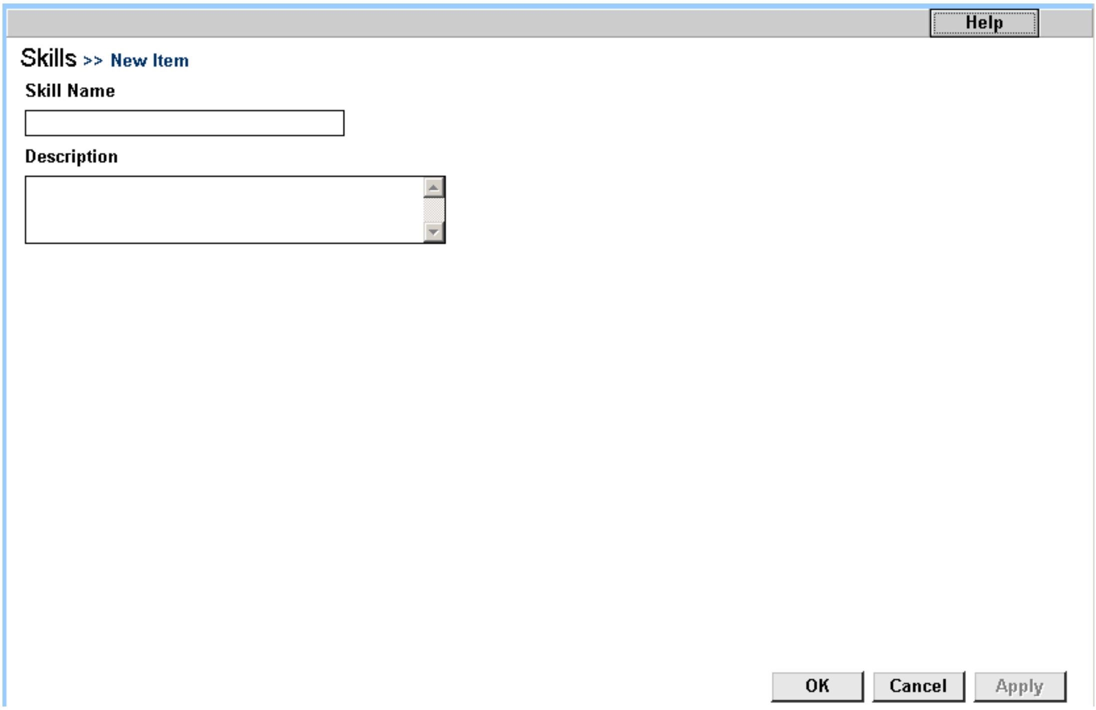

Figure 4-2 Add Skill Screen

3. In the Skill Name text box, type the name of the first skill from “Question 11: What skills will your agents possess for call routing?” of the *CCA Planning Survey* on page 2-8.

4. In the Description text box, describe the abilities an agent with this skill must possess.

5. Click **OK**. The Skills screen reappears, showing the new skill name and description.

6. Repeat steps 1 through 5 to create all the skills specified on the CCA™ Administrator’s Planning Survey.

7. See page 6-16 for how to assign these skills to individual agents.

Idle Time is a system-defined skill, which you cannot delete or edit.

Creating a URL Library

CCA lets you compile a library of Uniform Resource Locators (Web pages) containing content agents can use when assisting customers.

To create a library of URLs

1. Click **Options** > **URLs** > **Add** button. The Add URL screen (Figure 4-3) opens.

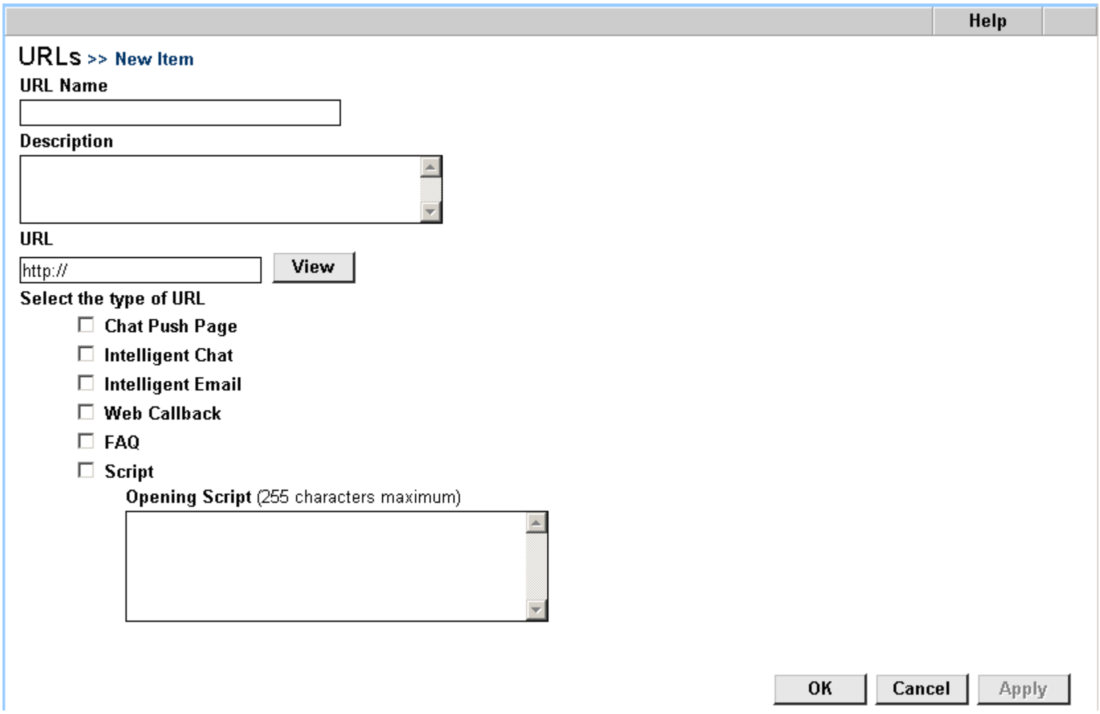

Figure 4-3 Add URL Screen

2. In the URL Name text box, type a name for the first URL from "Question 13: Will your agents read prepared scripts?" of the *CCA Planning Survey* on page 2-9.

3. In the Description text box, describe the purpose or contents of this URL.

4. In the URL text box, enter the URL address.

5. Click **View** to preview the contents of the URL and verify the link.

6. Use the information in Table 4-1 to check all the applications this URL serves.

Table 4-1. URL Application and Description

URL Application	Description
Chat Push Page	Check to make the content of this URL available to agents handling chat customers, or to make this URL available for automatically “pushing” to a chat customer who is waiting for an agent. (For example, agents can quickly direct chat-based customers to a Web page by sending them a Chat Push URL.)
Intelligent Chat	Check to make the content of this URL available to an agent who has a suggested response to a customer based on automatic text analysis of the customer’s chat message.
Intelligent Email	Check to make the content of this URL available to an agent who has a suggested response to a customer based on automatic text analysis of the customer’s email message.
Web Callback	Check to make the content of this URL available to agents handling Web callback interactions.
FAQ	Check to make the content of this URL available to agents providing service to customers reaching the call center by phone, chat, email, or Web. (Suggested content is a list of approved responses to your customer’s most frequently asked questions.)
Script	Check to make the content of this URL available to agents providing service to customers reaching the call center by phone, chat, email, or Web. (Suggested content is company-approved text for introducing a product or service to the customer.) If checked, then you must enter an opening script in the text box. The opening script appears in the Opening Script area of the agent’s IM screen. The agent clicks **Load Script** to view the content specified in the script URL

7. Click **OK** (or **Apply**).

8. Repeat steps 1 through 8 to enter all desired URLs.

Creating Agent Statuses

CCA indicates the status of every agent presently logged into the system. Supervisors use these agent status indicators to monitor agent activity. Agents depend on the IM status indicator to control their availability.

To understand system statuses

Table 4-2 lists the predefined system statuses, the condition that triggers the status, and whether agents can receive new interactions while they are set to the status.:

Table 4-2. System Statuses, Meanings, and Conditions

Status	Meaning	Condition
ACD Call	Busy	The agent is handling a call.
ACD Callback	Busy	The agent is handling a callback request
ACD Chat	Busy	The agent is handling a chat interaction
ACD Email	Busy	The agent is handling an email interaction.
ACD Fax	Busy	The agent is handling a fax interaction
ACD Status Outbound Email	Busy	The agent used IM (Contact tab) to initiate an outbound email.
ACD Voicemail	Busy	The agent is responding to a voice mail interaction.
ACD Web Callback	Busy	The agent is handling a Web callback request.
Available	Available	The agent is not presently handling an interaction. An agent can manually select this status or can receive this status after completing an interaction (configured by Administrator).
Busy	Busy	The agent is not available to receive any other ACD interactions.
Direct Chat	Busy	A supervisor and an agent are chatting.
Last Call	Busy	Set by agent to indicate that the agent will not take anymore interactions after completing the current interaction.

Table 4-2. System Statuses, Meanings, and Conditions

Status	Meaning	Condition
Login	Available	Reserved for future use.
Logout	On Break	The agent logged out of IM. This status appears in the Company Directory.
New Inbound Call	Busy	The agent accepted a call made directly to their number from a number outside the call center.
New Inbound Extension	Busy	The agent accepted a call made directly to their number from an internal extension.
New Outbound Call	Busy	The agent directly dialed a number outside the call center.
New Outbound Extension	Busy	The agent directly dialed a company extension.
New Predictive Call	Busy	The agent accepted a predictive call.
New Preview Call	Busy	The agent accepted a preview call.
No Answer	On break	The agent did not answer a workgroup call after the maximum allowed number of rings.
On Break	On break	Set by agent to identify that the agent is not available to receive interactions.
Selecting Outcome	Busy	The agent disconnected from the last interaction, but is still selecting an outcome for that interaction.
Supervising	Busy	A user logged into Supervision Manager and is not available to receive ACD interactions.
Wrap Up	Busy	The agent is wrapping up an interaction. The agent status changes to *Available* automatically upon expiration of wrap-up time.

You can supplement the above list with additional statuses for your call center. For example, “Ten Minute Break” or “Out to Lunch.”

To create a status

1. Click **Libraries** > **Agent Status** > **Add** button.

   The Add Agent Status screen (Figure 4-4) opens.

2. Locate the row for the language the new status supports.

   a. In the Status Name column, type a name for the first Agent Status from “Question 12: What statuses will you use for your agents?” of the *CCA Planning Survey* on page 2-9.

   b. In the Description column, describe the activity an agent must engage to receive this status.

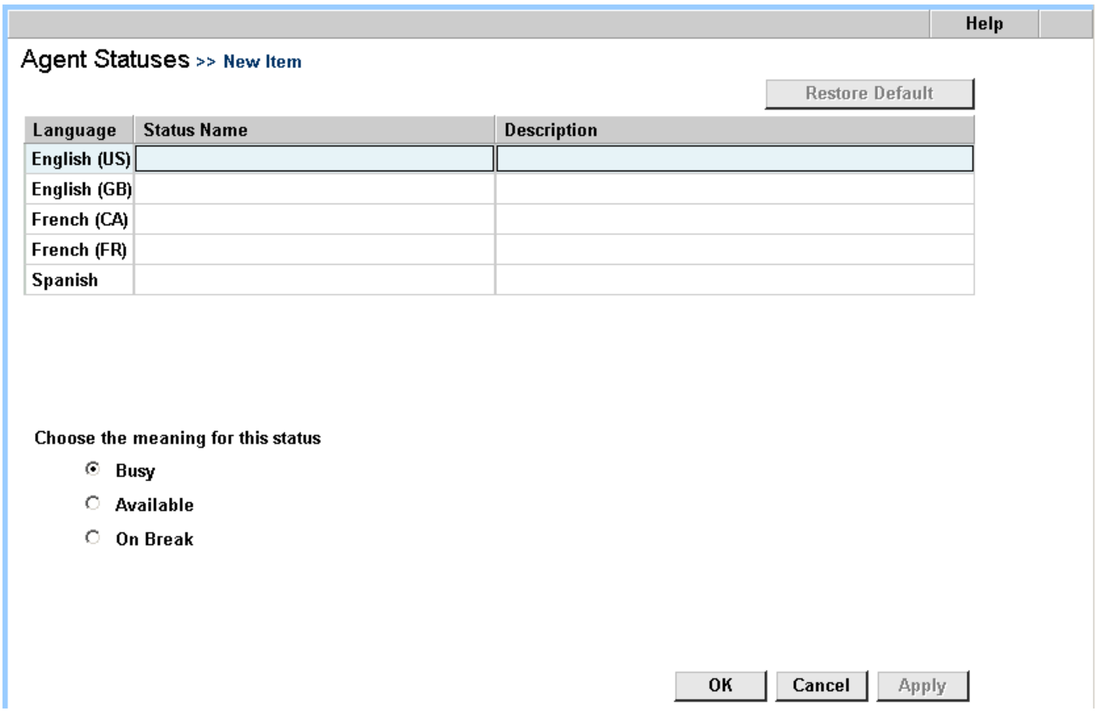

Figure 4-4 Add Agent Status Screen

3. Using the information in Table 4-3, choose a meaning for this status.

Table 4-3. Status Meanings and Descriptions

Meaning	Description
Busy	This means the agent is busy handling a task. If the task the agent is handling an online interaction (call, callback, or Web callback), then CCA routes incoming interactions to another agent. If the agent is handling an offline interaction (fax, email, or voicemail), CCA continues to route incoming interactions to the agent until reaching the maximum number of offline interactions allowed for the agent. (Refer to “Offline: Type the maximum number of simultaneous offline (fax and email) interactions CCA can route to the agent while the agent is logged into IM.” on page 6-8).
	If the agent is handling a chat interaction, CCA continues to route incoming chat interactions to the agent until the maximum number of chat interactions allowed for the agent is reached. (Refer to “Chat: Type the maximum number of simultaneous chat Interactions that the system can route to the agent while they are logged into IM.” on page 6-8).
Available	The agent is available to handle interactions. While the agent is set to available, CCA considers this agent when routing interactions. **WARNING**: If you set *No Answer* status to mean available, CCA may mis-route interactions if an agent forgets to log out of IM before leaving their workstation.
On Break	The agent is logged into CCA, but is currently unavailable to receive interactions.

4. Repeat steps 3 and 4 for all the languages the status supports

5. Click **OK**.

6. Repeat steps 1 through 6 until you have entered all the statuses you specified on the Planning Survey.

To restore system statuses back to their default name and meaning, click **Restore Default**.

When an agent clicks the **Change Status** button in IM, CCA displays the status list so the agent can select one.

Statuses from the Agent Status Library appear in the **My Status** banner area of IM. The status meaning (Busy, Available, or On Break) appears in the **Current Status** area of IM.

To delete a status

1. Click **Libraries** > **Agent Status**. The Agent Status list appears.

2. Click the status to delete and then click the **Delete** button. A confirmation message (Figure 4-5) appears.

Figure 4-5 Delete Status Confirmation Message

Click **OK**.

You cannot delete a system status.

Interaction Timeouts

Interaction timeout is not the same as inactivity timeout.

After CCA offers an ACD interaction to an agent, the interaction returns to a queue, if the agent does not accept within a specific time. The time the agent has to accept the interaction varies, depending on the interaction type.

Only ACD interactions have timeouts. CCA automatically accepts interactions that do not go through workgroups.

Table 4-4 provides each interaction type and its default timeout or the timeout parameters, if configurable.

Table 4-4. Interaction Types and Timeout Descriptions

Interaction Type	Timeout Description
ACD Voicemail	Hard coded to 5 minutes.
ACD Fax	Hard coded to 5 minutes.
ACD Email	Hard coded to 5 minutes.
ACD Chat	Hard coded to 1 minute.
ACD Call	Configurable. See “Set the number of rings the system will wait for an Agent to answer” on page 6-7.
ACD Callback	1 minute.
ACD Web Callback	1 minute.

Outcomes and Rescheduled Callbacks

What are Outcomes?

An outcome describes the result of an interaction. Example outcomes include: Sale, Request for Information, and so on.

- See "Selecting Interaction Outcomes for the Project" on page 10-78.

What are Callbacks?

If a customer tries to reach the call center, either by phone or through the Web, and no agents are available, configure AM so that the customer can ask to be called back. If the customer requested a call back from a Web page, the customer can specify *when* to call back. If the customer requested a callback over the phone, the customer is called back as soon as an agent is available.

- Web Callbacks: See "Adding Web Callback Interactions to a Project" on page 10-72.
- ACD (phone) Callbacks: See "Allow customer to request a callback" on page 7-15.

What are Rescheduled Callbacks?

CCA considers the customer's request to be called back an interaction. When the customer makes the request (for Web Callbacks) and/or as soon as an agent becomes available, CCA offers the call back to an agent. If the agent accepts the call back interaction, CCA calls the customer. If the customer does not answer their phone, the agent can reschedule by asking CCA to call the customer again, later.

In IM, the "Reschedule a Callback" feature is in the same dialog box as the outcomes (Figure 4-6) feature.

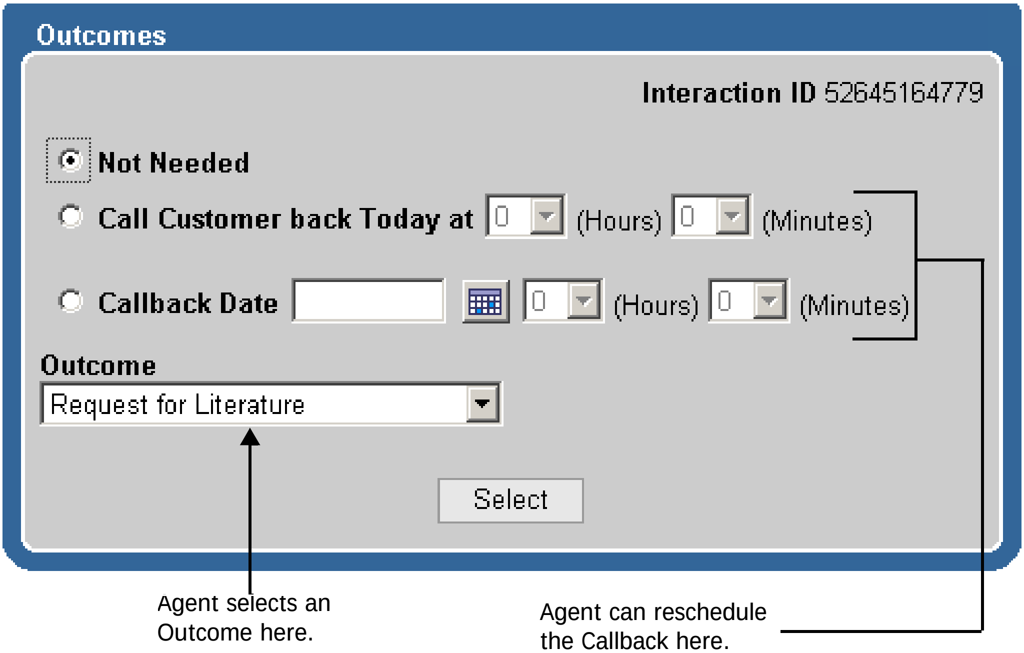

Figure 4-6 Outcomes Dialog Box in IM

Since both features are in the same dialog box, for agents to reschedule a call back for a later time, outcomes must also be enabled (see “Selecting Interaction Outcomes for the Project” on page 10-78).

Creating Interaction Outcomes

Outcomes basically describe the result of an interaction. Example outcomes include “Sale,” “Request for Literature,” and “Complaint.” With the **Outcomes** feature enabled, you can create administrative reports that analyze the results of all interactions handled by your agents.

You can configure CCA to automatically display the Outcome Library and require agents to choose an outcome at the end of these types of interactions:

Workgroup Emails
Workgroup Calls
Chats
Web Callbacks
Outbound Calls
Preview Calls
Predictive Calls
Callbacks
Voicemails

You cannot configure outcomes for these types of interactions:

Internal/External extension calls
Direct Inbound calls

To make outcomes required for an agent

1. Select required the **Requires Outcome** check box for the agent by clicking **Options** > **Agents > Add** (or **Edit**) > **Controls and Restrictions** tab > **Require Outcome** check box. (See page 6-10.)

2. Create one or more outcomes (see “To create interaction outcomes” below).

3. Add required outcomes to your project by clicking **Options** > **Projects** > **New** (or **Edit**) > **Outcomes** tab. (See page 10-78.)

Also refer to “Outcomes and Rescheduled Callbacks” on page 4-12.

To create interaction outcomes

1. Click **Libraries** > **Outcomes** > **Add** button. The Outcomes screen (Figure 4-7) opens.

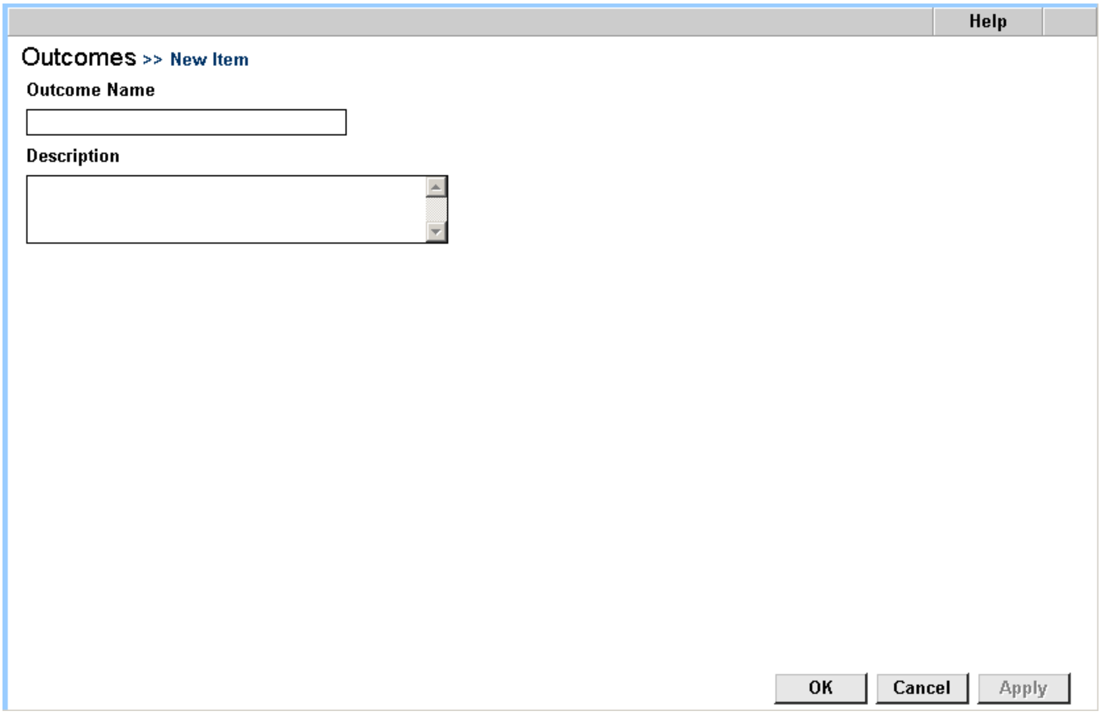

Figure 4-7 Outcomes Screen

2. In the Outcome Name text box, enter the name of the first outcome from “Question 20: Will you track interaction results?” of the *CCA Planning Survey* on page 2-15.

3. In the Description text box, describe the results or criteria an interaction must meet to qualify for this outcome.

4. Click **OK** (or **Apply**).

5. Repeat step 1 through 5 to create all the outcomes specified on the Planning Survey.

Later, you can decide whether to activate the **Mandatory Outcomes** feature for your agents, which requires them to assign an outcome to each completed interaction (see “Require outcome” on page 6-10).

Creating a Company Prompt Library

CCA company prompts are sound recordings (in .wav format) which greet and inform callers dialing into your company.

CCA provides a set of default ***System Prompts*** (see “System Prompts Overview” on page 5-2) but you can also create custom ***company prompts***. Table 4-5 provides a list of ways CCA uses custom recordings from the Prompt Library.

Table 4-5 Applications for the Company Prompt Library (Part 1 of 2)

Prompt Purpose	CCA Feature	System Default
A touch-tone menu description explaining how to navigate the call center.	Create touch-tone menus for callers hear explaining how to navigate your call center. See the “Prompt” control on page 8-12 for information on assigning a recording from your Prompt Library to a touch-tone menu.	None.
Ask the caller to enter their ID number.	To identify callers for prioritization, configure CCA to ask callers to enter an ID number or other personal information. See the “Use Prompt to ask for customer ID” control on page 10-8 for information on using a recording from the Prompt Library to request that callers enter an ID.	“Please enter your customer ID number followed by the pound key.”
A menu of options available to a caller who has finished leaving a voicemail message.	Create touch-tone menus for callers who finished leaving a voicemail message. See the “Menu played after voicemail” control on page 10-11 for information on assigning a recording from the Prompt Library to a touch-tone menu created for this purpose.	None.
Greet callers entering a workgroup queue and must wait for an agent.	See **Intro** under the “Select Prompts for this workgroup” control on page 7-17 for information on choosing a recording from the Prompt Library to greet callers entering a workgroup.	“All Agents are currently busy with other callers. Please continue to hold to maintain your priority sequence. This call may be monitored for quality assurance purposes.”

Table 4-5 Applications for the Company Prompt Library (Part 2 of 2)

Prompt Purpose	CCA Feature	System Default
Play an informational message for callers waiting to be connected to a workgroup agent	See **Hold** under the "Select Prompts for this workgroup" control on page 7-17 for information on choosing a recording from the Prompt Library to play an message for callers waiting to be connected to a workgroup agent.	"Your call is very important to us. Please hold for the next available agent. All calls are answered in the order in which they are received."
Inform the caller that an agent is available and they are about to be connected.	See **Ring** under the "Select Prompts for this workgroup" control on page 7-17 for information on choosing a recording from the Prompt Library for this purpose.	Thirty-five seconds of ringing (7 rings).
Entertain callers who are waiting to be connected to a workgroup agent.	See **Music** under the "Select Prompts for this workgroup" control on page 7-17 for information on choosing a recording from the Prompt Library to entertain callers waiting to be connected to a workgroup agent.	Fifty-six seconds of pre-recorded music.
Leave a message for a prospective customer's answering machine reached through a Predictive call.	See "Leave message" on page 10-24 for information on leaving a message for a customer reached through a Predictive call.	None

You must record and save your prompt recordings ***before*** adding them to the Prompt Library. See Chapter 5, "Customizing Prompts," for a complete discussion of recording, saving, and how to use customized and supplied default prompts in CCA.

To add a prompt to the Prompt Library

1. Click **Libraries** > **Company Prompts** > **Add** button.

   The Company Prompts screen (Figure 4-8) opens.

2. In the Prompt Name text box, type a name that will appear in the prompt list after setting Administration Manager to the language supported by this prompt.

3. Click on the language in which you recorded your prompt.

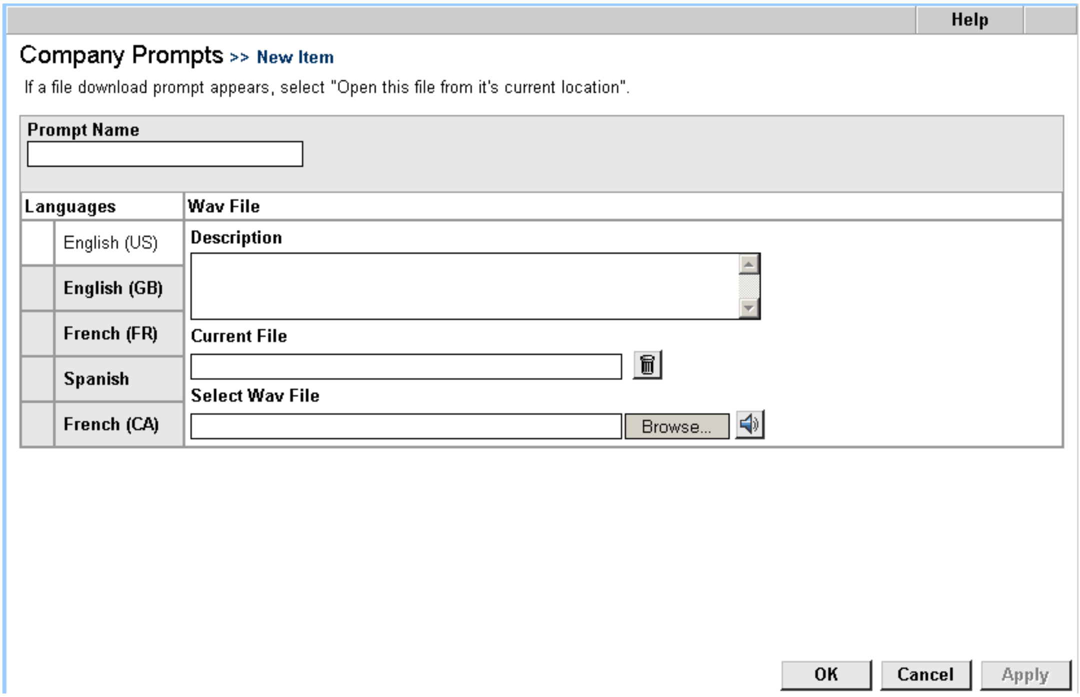

Figure 4-8 Company Prompts Screen

4. In the Description text box, type a description that will appear in the prompt list after setting Administration Manager to the language supported by this prompt.

5. Enter the file name and path to the prompt, or click **Browse...** to choose the file from your computer or network. AM uploads the file.

6. Click  to listen to the recording to verify that it is correct, or click  to cancel a prompt recording previously uploaded.

7. Repeat steps 4 through 7 for each language for which you recorded a prompt.

8. Click **OK** (or **Apply**).

   CCA stores the new prompt in the CCA database and plays it for callers (or agents), as necessary.

Data Sources

Creating Data Sources is an advanced topic. It can require knowledge of the call center server architecture and planning, administrator level access to the default CCA database, as well as other back end databases used by a call center, and administrator rights on one or more call center servers.

CCA ships with a fairly large database containing many tables. One of these tables, the **Contacts** table, is highly customizable. The Contacts table is where CCA stores contact records created by agents and supervisors.

The Contacts table arrives pre-configured and ready to use. You can use it immediately without any changes. In some cases, customers customize this table or replace it with a table of their own. For example a customer with a lot of contact data in a separate database might find it easier to replace the Contact table than customize the existing table.

What is a Data Source?

A **Data Source** is a record that passes CCA information about your contact record structure and where the data is stored.

The Data Source feature works together with the Display Templates feature:

- The Data Source identifies what contact data to store and where it is stored. You cannot edit the default System Data Source.
- The Display Templates feature provides default templates for identifying how contact data appears to agents and supervisors. You cannot edit default Display Templates.

You may find this chapter easier to understand if you first read “Creating New Display Templates” on page 4-38.

Types of Customization

Table 4-6 provides an overview of six main configuration for customizing contact record storage.

Table 4-6. Ways to Customize Contact Record Storage

Configuration	Description
1 Also see "Configuration 1: Out of Box" on page 4-22.	Keep your contact records in the default table. Use the default System Contact Template. • default System Contact Template • default Data Source • default Contact Table • CCA database • CCA Web server
2 Also see "Configuration 2: Contact Records Stored in Contacts Database" on page 4-24.	Keep your contact records in the default table. Create a new Contact Template. • **custom Contact Template** • default Data Source • default Contact Table • CCA database • CCA Web server
3 Also see "Configuration 3: Contact Records Stored in Default Contact Table" on page 4-26.	Keep your contact records in the default table. Create a new Contact Template and a new Data Source. • **custom Contact Template** • **custom Data Source** • default Contact Table • CCA database • CCA Web server
4 Also see "Configuration 4: Storing Your Contact Records" on page 4-29.	Keep your contact records in a new table that you create in the CCA database. Create a new Contact Template and a new Data Source. • **custom Contact Template** • **custom Data Source** • **custom Contact Table** • CCA database • CCA Web server

Table 4-6. Ways to Customize Contact Record Storage

Configuration	Description
5 Also see “Configuration 5: Storing Same Contact Records” on page 4-32.	Keep your contact records in a new table that you create in your database. Create a new Contact Template and a new Data Source. • **custom Contact Template** • **custom Data Source** • **custom Contact Table** • **your database** • CCA Web server
6 Also see “Configuration 6: Storing Your Contact Records” on page 4-35.	Keep your Contact records in a new table that you create in your database. Use your own Web server to manage the database connection pool. Create a new Contact Template and a new Data Source. • **custom Contact Template** • **custom Data Source** • **custom Contact Table** • **your database** • **your Web server**

Database and Table Requirements

- If you are using a table in your own database, the database must support JDBC.
- The primary key of the table must consist of a single column.
- You must know the structure of the table that you want to access:
  - Table name
  - Column names
  - Column data types
  - Column max len/value;
  - Primary key
  - CCA expects the contact data to be in a single table. To use multiple tables, you must create a view or create your own database access component (ContactBean.class).
  - The table can only use data types of integer or string.

Web Server Requirements

- Your Web server must be able to configure a pool of connections on the Web server (IIS, WebSphere, Resin, and so on). This is in the web.xml file on the Web server that you want to access.
- You must install the Contact Component - a set of class files and JSP files.
- The Web server must have a JDBC driver to connect to your database.
- The Web server must have JVM 1.4.2_03.

Installing the Supported Configurations

Refer to Table 4-6 on page page 4-20 for an overview of each configuration.

Configuration 1: Out of Box

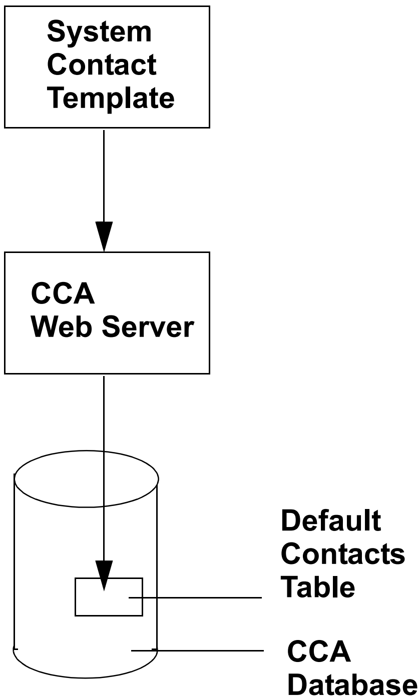

Figure 4-9 Configuration 1: "Out of the Box" Configuration

An “out of the box” configuration is where you use the CCA pre-defined as:

- System Contact Template
- Web Server
- Database, and
- Contacts table

In this configuration:

- You cannot edit the **System Contact Template**. This identifies the default contact record fields agents see when they use Interaction Manager.

You cannot delete the **System Contact Template**.

- When agents and supervisors login, they will select the **System Contact List** in the Contact tab. From their view, all of contact records appear in this list. From the database view, all contact records are in the default Contacts table.

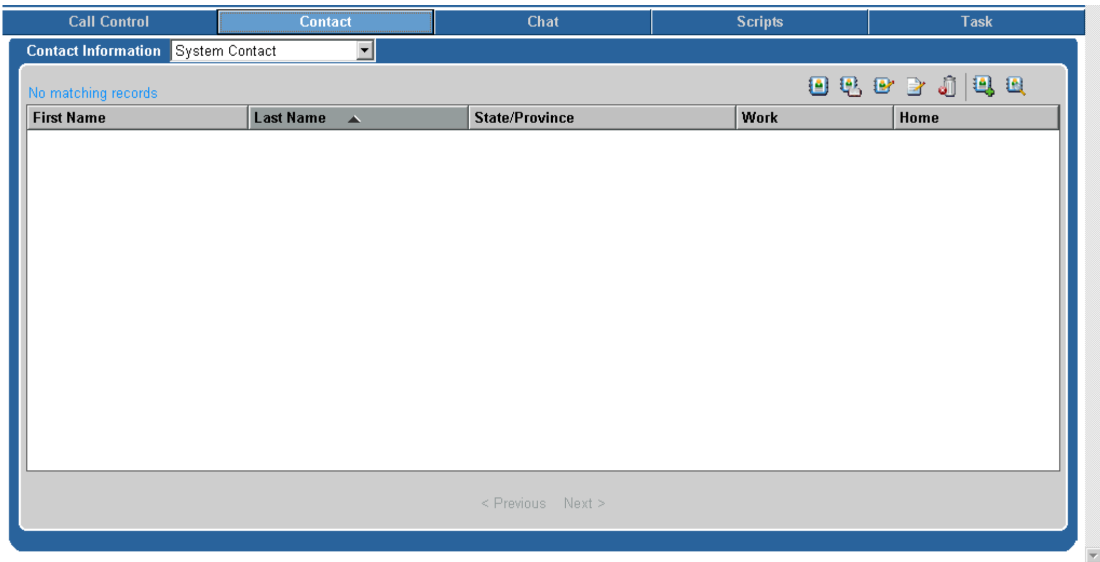

Figure 4-10 Agents Select System Contact List at Login

To install configuration 1

1. Select **Libraries** > **Display Templates**.
2. In the Display Templates main screen, right click **System Contact**.
3. Click **OK**.

Configuration 2: Contact Records Stored in Contacts Database

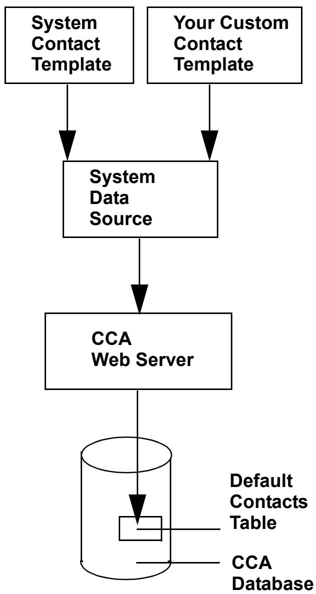

Figure 4-11 Configuration 2: Contact Records Stored in Contacts DB

In this configuration:

- All contact records are stored in the default Contacts table.
- When agents and supervisors login, they will see the System Contact List and your new Contact List (the name of your template). However, both lists are the **same**.

  For example, if you have 50 contact records in the System Contact List, the same 50 records appear when the agent selects your Contact List.

Figure 4-12 IM - Contact Information Drop-Down Menu Item

To install configuration 2

1. Create a new contact template. (See “Creating New Display Templates” on page 4-38 for complete information.)

2. Click **Libraries** > **Display Templates** > **Add** button. The Add Display Templates screen opens.

3. In the Add Display Templates screen:

   a. In the **Name** tab, type a unique name and description for your new Contact Template.

   b. From the Data Source list box, select **System Contact Datasource**.

   c. Click the **Layout** and **List Header** tabs to make any changes you desire.

   d. Click **OK** (or **Apply**) to save your changes.

Configuration 3: Contact Records Stored in Default Contact Table

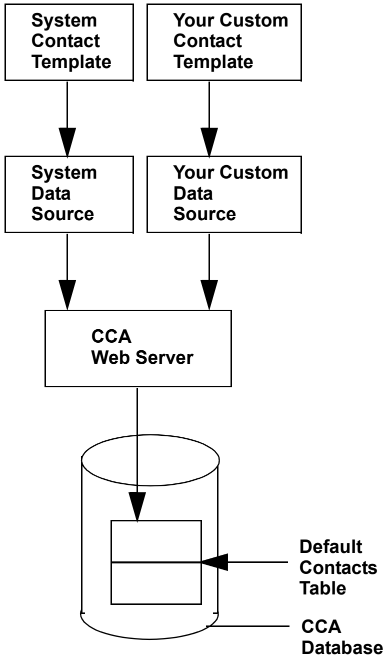

Figure 4-13 Configuration 3: Contact Records Stored in Default Contact Table

In this configuration:

- All contact records are stored in the default Contacts table.
- When agents and supervisors login, they will see the System Contact List and your new Custom Contact List (the name of your new Contact Template). However, both lists are **different** (compare this to Configuration 2). For example, if you have 50 contact records in the System Contact List, none of them appear when the agent selects your new Custom Contact List.

You can have completely separate lists of contact records in the same default Contacts table. This is because the table uses a Data Source ID column to identify which Data Source was used when the Contact record was created.

Process Example

You’ve created a new Contact Template called “US Contacts,” which uses a new Data Source. (The name of the Data Source does not matter in this example.)

An agent logs into IM, selects the System Contact List from the Contact Information drop-down menu and creates three contact records: Mike Roberts, Susan Dawson, and Anthony Anderson.

The agent then selects your new Custom Contact Template (named “US Contacts”), which appears as a item in the Contact Information drop-down menu. Then agent them creates another three contact records: Evan Lewis, Steve Callard, and Joanne Ritchie.

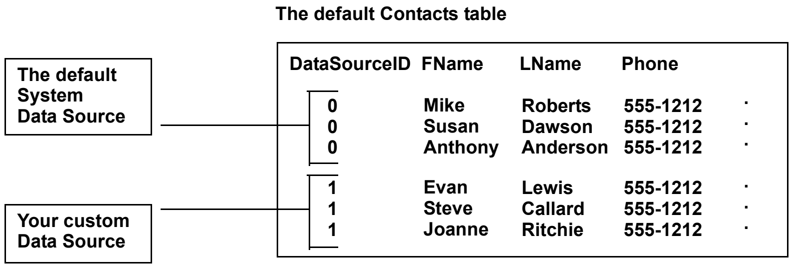

Figure 4-14 The Default Contacts Table

For Configuration 3, Figure 4-14 shows how those records appear in the database:

Figure 4-15 Two Contact Lists With Different Records

To install configuration 3

1. Create a new Data Source:

   a. Click **Libraries** > **Data Source** > **Add** button. The Add Data Source screen opens.

   b. In the **Name** tab, type a unique name and description for the Data Source.

   c. In the **Data Source** tab:

      i. Under Data Format, click **System Default**.

      ii. Under Database Pool Name, click **System Default**.

      iii. Under URL, click **System Default**.

   d. Click on **OK** (or **Apply**) to save your changes.

2. Create a new Contact Template:

   (See “Creating New Display Templates” on page 4-38 for complete information.)

   a. Click **Libraries** > **Display Templates** > **Add** button. The Add Display Templates screen opens.

   b. In the **Name** tab:

      i. In the Label Name column, type a unique name for your new Contact Template.

      ii. From the **Data Source** drop-down menu, select the name of the new Data Source that you created in the previous step.

   c. Click the **Layout** and **List Header** tabs, and make any changes.

   d. Click **OK** (or **Apply**) to save your changes.

When an Agent logs in, your Custom Template is not selected by default. However, you can assign your Custom Template to a project so that when CCA routes a call to that project, the system searches your data source in an attempt to make the contact assignment.

Configuration 4: Storing Your Contact Records

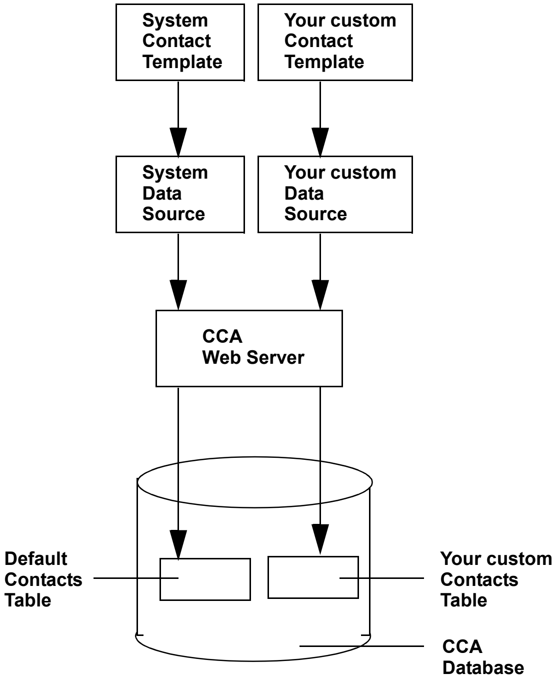

Figure 4-16 Configuration 4: Storing Your Contact Records

In this configuration:

- You can store some or all of your contact records in the new table that you create in the CCA database.
- When agents and supervisors login, the System Contact List and your new Custom Contact List (the name of your Contact Template) appears. However, both lists are **different** (compare this to Configuration 2). For example, if you have 50 contact records in the System Contact List, none of them appear when the agent selects your new Custom Contact List.

The fact that system contact records exist in one table and your other contact records are in another table is completely transparent to agents and supervisors.

To install configuration 4

1. Create your new table in the CCA database:

    a. Your contact data must be in a single table or a view.

    b. The primary key for your contact table must consist of a single column.

    c. The columns in your contact table must use a data type of integer or string.

2. Create a new Data Source:

    a. Click **Libraries** > **Data Source** > **Add** button. The Add Data Source screen opens.

    b. In the **Name** tab, type a unique name and description for the data source.

    c. In the **Data Source** tab, under Data Format, click **User Defined**. A new box (Figure 4-17) appears.

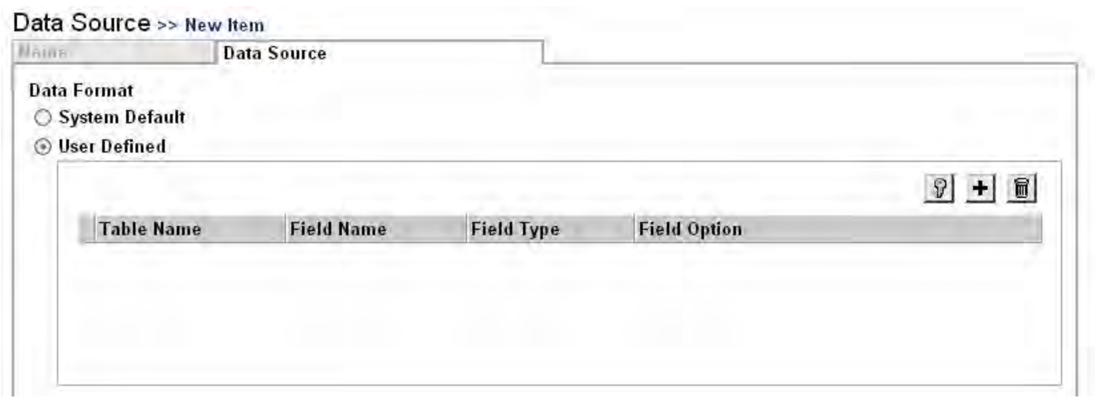

Figure 4-17 Data Format > User Defined Selection

    d. Click the plus icon . The column heading (Figure 4-17) appear.

    e. Type the Table Name, Field Name, Field Type, and Max Length of the first column in your custom Contact table.

You only need to enter the columns that you want agents and supervisors to see when they login. If you have a column in your custom Contacts table that you do not need agents and supervisors to see, you do not need to add it in the Data Source screen.

Even if you do add a column here, you can always hide it from users later when you create your new Contact Template.

f. Under Database Pool Name, click **System Default**.

g. Under URL, click **System Default**.

h. Click **OK** (or **Apply**) to save your changes.

3. Create a new Contact template:

See “Creating New Display Templates” on page 4-38 for complete information.

a. Click **Libraries** > **Display Templates** > **Add** button. The Add Display Templates screen opens.

a. In the **Name** tab:

i. In the Label Name column, type a unique name for your Contact Template.

ii. From the **Data Source** drop-down menu, select the name of the Data Source that you created in the previous step.

b. Click the **Layout** and **List Header** tabs, and make any changes.

c. Click **OK** (or **Apply**) to save your changes.

4. You can assign your new template to a project.

When an agent logs in, your new template is not selected by default. However, when CCA routes a call to that project, the system searches your data source in an attempt to make the contact assignment.

Configuration 5: Storing Same Contact Records

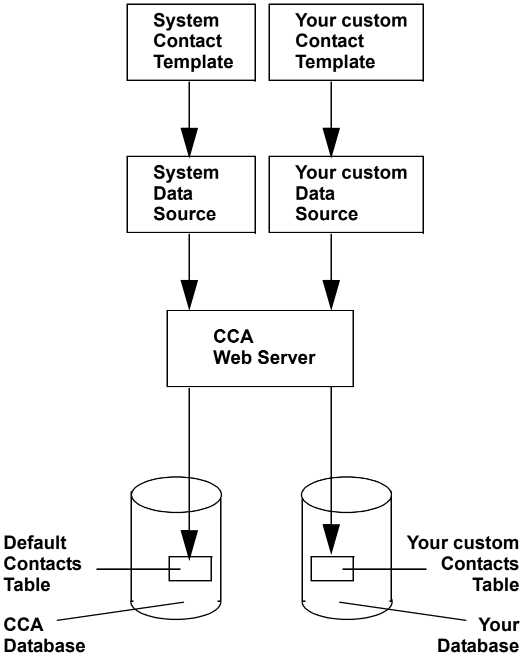

Figure 4-18 Configuration 5: Storing Some Contact Records

In this configuration:

- You can store some or all of your contact records in the new table you create in your database.
- When agents and supervisors login, they will see the System Contact List and your new Custom Contact List (the name of your Contact Template). However, both lists are **different** (compare this to Configuration 2). For example, if you have 50 contact records in the System Contact List, none of them appear when the agent selects your Custom Contact List.

The fact that system contact records are in one database and your other contact records are in another database is completely transparent to agents and supervisors.

To install configuration 5

1. Verify that your new database supports JDBC.

2. Create a new Contact table in your database:

   a. Your Contact data must be in a single table or a view.

   b. The primary key for your Contact table must consist of a single column.

   c. The columns in your Contact table must use a data type of integer or string.

3. Create a new Data Source.

   a. Click **Libraries** > **Data Source** > **Add** button. The Add Data Source screen opens.

   b. In the **Name** tab, type a unique name and description for the the data source.

   c. In the **Data Source** tab:

      i. Under Data Format, click **User Defined**. A new box (Figure 4-16 on page 4-29) appears.

      ii. Click the plus icon . The column headings appear (Figure 4-16 on page 4-29).

      iii. Type a Table Name, Field Name, Field Type, and Max Length of the first column in your custom Contact table.

You only need to enter the columns that you want agents and supervisors to see when they login. If you have a column in your custom Contacts table that you do not need agents and supervisors to see, you do not need to add it in the Data Format screen.

Even if you do add a column here, you can always hide it from users later when you create your custom Contact Display Template.

   d. Under Database Pool Name, click **User Defined** and type the name of the database that you entered in your web.xml file.

e. Under URL, click **User Defined** and type the URL of your Web server in the text box.

f. Click **OK** (or **Apply**) to save your changes.

4. Create a new Contact template:

   (See “Creating New Display Templates” on page 4-38 for complete information.)

   a. Click **Libraries** > **Display Templates** > **Add** button. The Add Displays Templates screen opens.

   b. In the **Name** tab:

      i. In the Label Name column, type a unique name for your Contact Template.

      ii. From the **Data Source** drop-down menu, select the name of the Data Source that you created in the previous step.

   a. Click the **Layout** and **List Header** tabs, and make any changes.

   b. Click **OK** (or **Apply**) to save your changes.

5. You can assign your new template to a project. When an Agent logs in, your new template is not selected by default. However, but when CCA routes a call to that project, the system searches your new data source in an attempt to make the contact assignment.

Configuration 6: Storing Your Contact Records

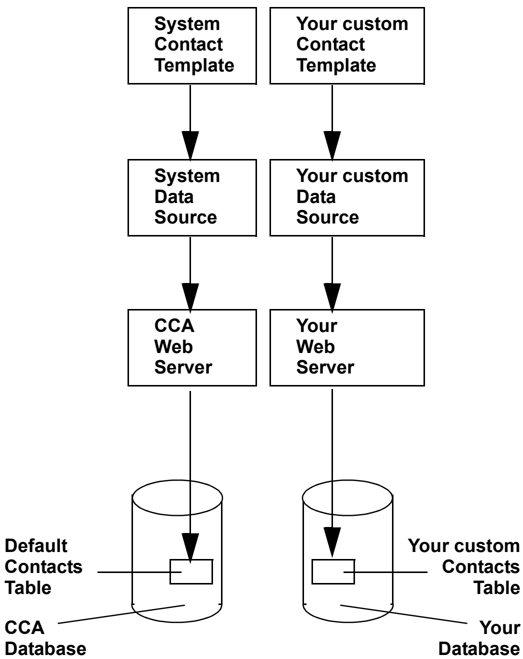

Figure 4-19 Configuration 6: Storing Your Contact Records

In this configuration:

- You can store some or all of your contact records in the new table that you create in your database.
- You can manage the connection pool to your new database with your own Web server.
- When agents and supervisors login, they will see the System Contact List and your new Custom Contact List (the name of your Contact Template). However, both lists will be **different** (compare this to Configuration 2).

  For example, if you have 50 contact records in the System Contact List, none of them will appear when the agent selects your new Custom Contact List.

The fact that system contact records exist in one table and your other contact records are in another table is completely transparent to agents and supervisors.

To install configuration 6

1. Configure your Web server.
   a. Create a connection pool in your Web server for your database.
   b. Install the CCA Contact Component on your Web server.
   c. Verify that your Web server has a JDBC driver that can connect to your database.
   d. Install JVM 1.4.2_03 on your Web server.
2. Verify that your new database supports JDBC.
3. Create a new Contact table in your database:
   a. Your contact data must be in a single table or a view.
   b. The primary key for your contact table must consist of a single column.
   c. The columns in your contact table must use a data type of integer or string.
4. Create a new Data Source:
   a. Click **Libraries** > **Data Source** > **Add** button. The Add Data Source screen opens.
   b. In the **Name** tab, type a unique name for the data source.
   c. In the **Data Source** tab:
      i. Under the Data Format, click **User Defined**. A new box appears (Figure 4-16 on page 4-29).
      ii. Click the plus icon. Row headings appear (Figure 4-16 on page 4-29).

iii. Type the Table Name, Field Name, Field Type, and Max Length of the first column in your custom Contact table.

You only need to enter the columns that you want agents and supervisors to see when they login. If you have a column in your new Contacts table that you do not need agents and supervisors to see, you do not need to add it in the Data Format screen.

Even if you do add a column here, you can always hide it from users later when you create your custom Contact Display Template.

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iv. Under Database Pool Name, click **User Defined** and type the name of the database that you entered in your web.xml file.

v. Under URL, click **User Defined** and type the URL of your Web server.

vi. Click **OK** (or **Apply**) to save your changes.

5. Create a new Contact template:

(See “Creating New Display Templates” on page 4-38 for complete information.)

a. Click **Libraries** > **Display Templates** > **Add** button. The Add Display Templates screen opens.

b. In the **Name** tab:

i. In the Label Name column, type a unique name for your new Contact Template.

ii. From the **Data Source** drop-down menu, select the name of the new Data Source you created in the previous step.

c. Click the **Layout** and **List Header** tabs, and make any changes.

d. Click **OK** (or **Apply**) to save your changes.

6. You can assign your custom template to a project. When an agent logs in, your new template is not selected by default. However, when CCA routes a call to that project, the system searches your new data source in an attempt to make the contact assignment.

Creating New Display Templates

Administration Manager provides three default display templates:

- The **System Contact Template**.

  You cannot delete the System Contact Template but you can create a new System Contact Template.

  By default, contact records are stored in the CCA database. You can customize the storage of your contact records by using Data Sources. See “Types of Customization” on page 4-20 for more information.

- The **System Directory Template**.

  You can use this template as is or you can customize it, changing the way agents and supervisors view and search in the **Company Directory** dialog box in Interaction Manager.

  You can customize this template, but you cannot create new Directory Templates.

- The **System Transfer Template**.

  You can use this template as is or you can customize it, changing the way agents and supervisors view and search in the **Transfer** dialog box in Interaction Manager.

  You can customize this template, but you cannot create new Transfer Templates.

Contact Templates

A contact is anyone who has called, emailed, or started a Web chat with a call center. Agents and supervisors use the Contact tab in IM to create contact records and associate the record with a phone number or email address. The contact record usually contains information (such as name, address, phone number, email address, and so on), but can also contain agent notes.

When a customer reaches the call center, IM automatically shows the customer's contact record to the agent.

Using **Contact Templates** you can customize the way supervisors and agents view, add, and edit contact information. AM comes with a default template for contacts (the System Contact Template). You cannot modify or delete this template but you can create your own.

To create a new Contact Template

1. Click **Libraries** > **Display Templates > Add** button. The Add Display Templates screen (Figure 4-20) opens.

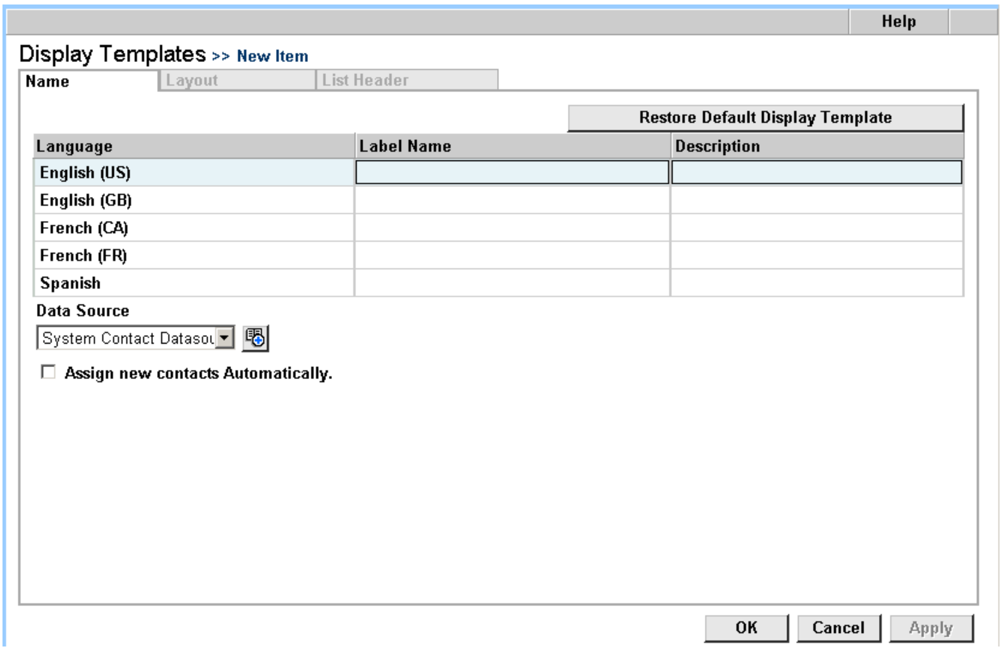


Figure 4-20 Add Display Templates: Name Tab

2. Using the information in Table 4-7, complete the **Name** tab.

Table 4-7. Name Tab Fields and Descriptions

Item	Description
Label Name	The label name appears in the list of templates after clicking the Contact Templates link in AM. The label name also appears to agents and supervisors when they log into IM. (Contacts tab > Contact Information). For example: • Enter the string “Contacts Sud Californiens” as a French Label Name. • When an agent logs into IM, the agent chooses French as the language. Then, when agent clicks the Contact Information drop-down menu (in the Contacts tab), the string “Contacts Sud Californiens” appears as a menu item.
Description	The description appears in the list of templates after clicking Contact Templates in IM.
Data Source	The location where information is stored. (AM provides a default System Data Source already configured for use.)
Assign New Contacts Automatically	Check this box so that an agent or supervisor can create a new contact record during a current interaction, and CCA will automatically assign it to the current interaction.

3. Click **Apply**.

4. Click the **Layout** tab (Figure 4-21) to customize the screen that agents and supervisors see when they add and view contacts.

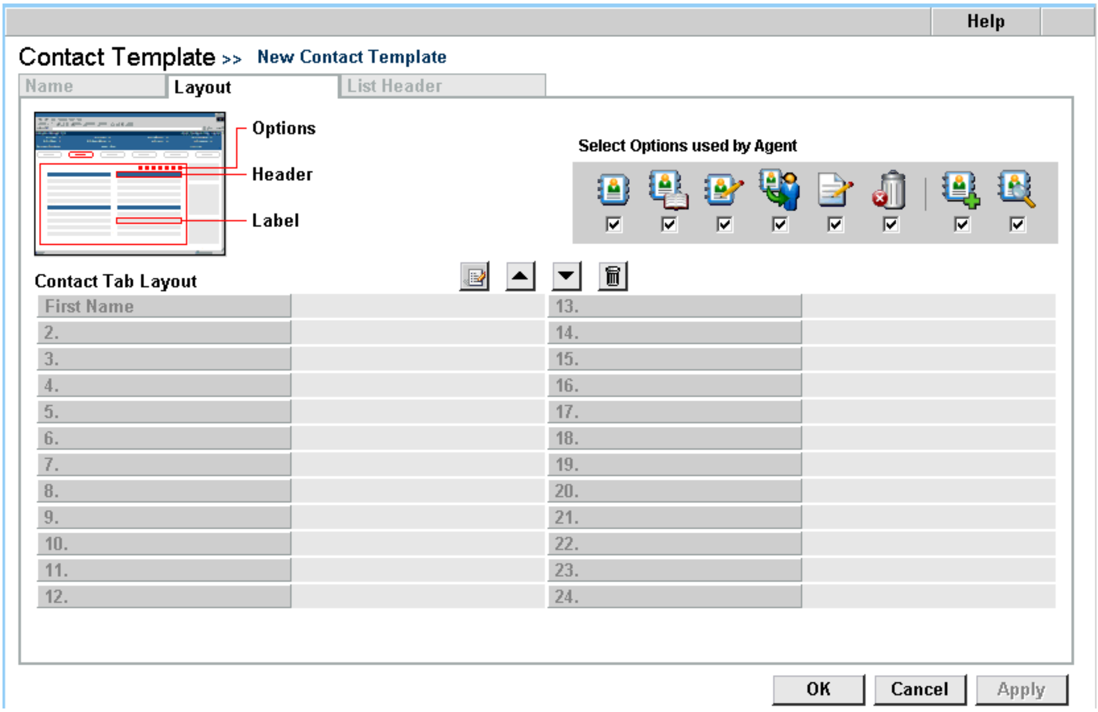
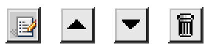


Figure 4-21 Contact Template: Layout Tab

The **Label** field holds some information about a contact (such as the first name, last name, phone number, and so on). Agents and supervisors complete these fields when adding or editing contact information.

A **Header**, like a column heading, serves as a title for several fields (such as "Contact Information" or "Additional Phone Numbers").

Use the **Options Used by Agent** to control how much access agents and supervisors have to contact information. (Table 4-8, "Agent Options," on page 4-43.)

Use the four buttons in the center of the tab  to add or delete labels and headers, and change their position. In addition, you can click on a label or header and drag it to a new location.

It may be easier to create a Contact Template when running two Web browsers:

1. In the first browser, login to AM.
2. In the second browser, login to IM as an agent and select the **Contact** tab.

With two browsers open, you can view your new Contact Template in IM. However, you must log out of IM and log back in each time you make a change to the template in AM.

To create a sample Contact Template

The following steps describe how to create a sample Contact Template.

1. Click **Libraries** > **Display Templates** > **Add** button. The Add Display Templates screen opens.

2. Select the **Layout** tab. The Contact - Layout screen (Figure 4-21 on page 4-41) opens.

3. Under **Select Options used by Agent**, click each option you would like available to agents. (Refer to Table 4-8 for a description of each option.)

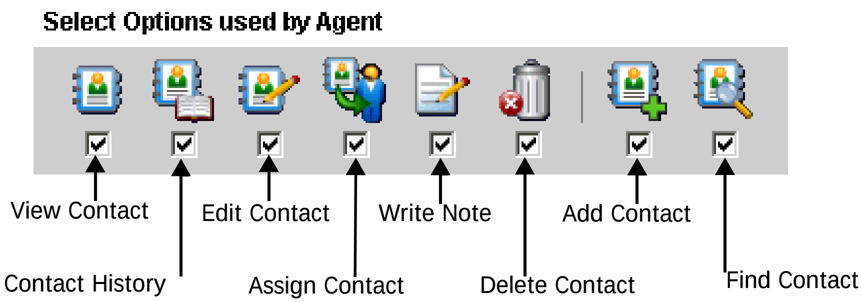


Figure 4-22 Select Options Used by Agents

Table 4-8. Agent Options

Agent Option	Meaning
View Contact	Agents and supervisors can view current interactions for the contact.
Contact History	Agents and supervisors can select a contact and view all interactions for that contact.
Edit Contact	The agent can change or delete the information in the contact record.
Assign Contact	Agents and supervisors can assign a contact to a customer.
Write Note	Agents and supervisors can attach a note to a contact. **Note**: Each contact can have multiple notes using a maximum of 1024 characters for each. (Agents and supervisors view notes from the Contact tab > View Contact button > History tab.)
Delete Contact	Agents and supervisors can delete the contact from the list. **Note**: CCA does not permanently remove deleted contacts from the data source and only flags them as deleted. However, only a user with direct access to the data source can change the deletion flag and restore the contact information. You cannot do this from AM.
Add Contact	Agents and supervisors can add contacts.
Find Contact	Agents and supervisors can access a contact search screen.

4. Edit the Labels and Headers for the Contact Template:

   a. Under Contact Tab Layout, double-click the first position ("**1.**") (You can also click the **Edit** icon.)

      The Edit Label/Header - Label dialog box (Figure 4-23) appears.

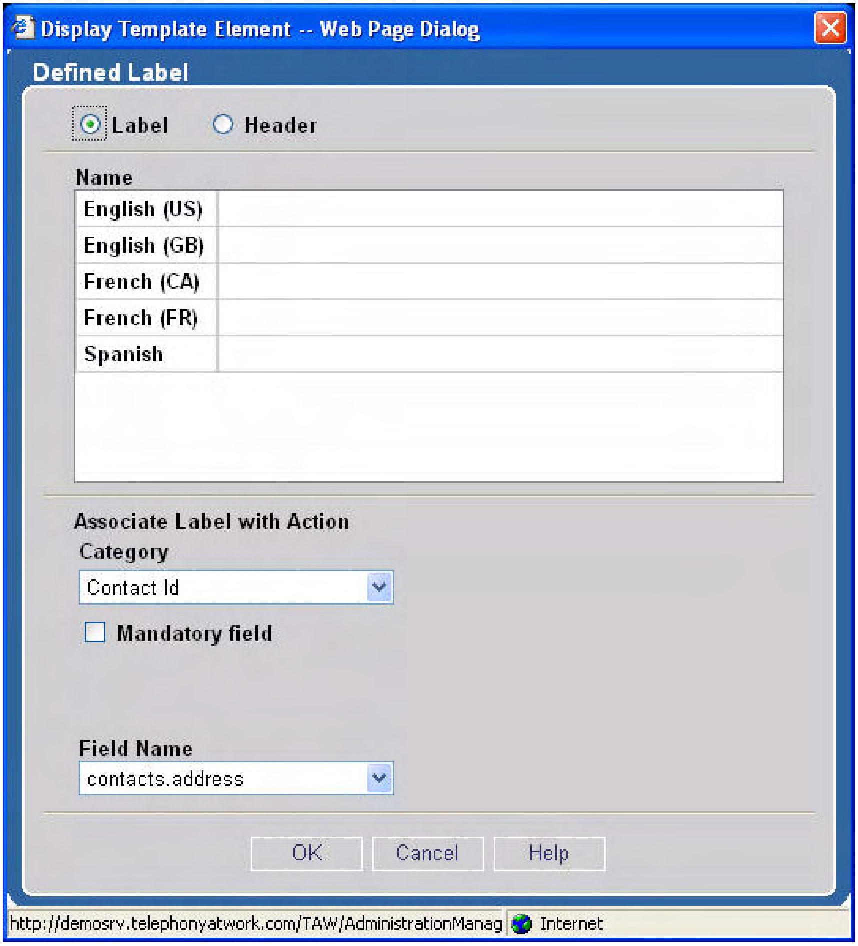


Figure 4-23 Edit Label/Header Dialog Box: Label

b. Click **Header**. The Defined Label - Header dialog box (Figure 4-24) opens.

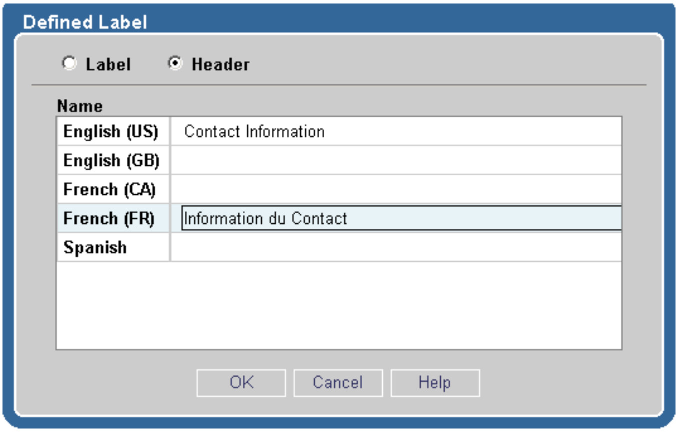


Figure 4-24 Edit Label/Header Dialog Box: Header Selected

5. In the second column, type a name for the corresponding header, such as **Contact Information** next to English (US).

   Type a name in every possible language agents might select when logging into IM. If you do not have a specific language preference, you can either leave it blank or just copy the name from your most commonly used language.

6. Click **OK** to save your new Header. The Add Display Templates screen (Figure 4-20 on page 4-39) reappears.

7. Double-click field number **2.**

8. Select **Label**. The Edit Label/Header Dialog Box: Label (Figure 4-23 on page 4-44) appears.

9. Using the information in Table 4-9, complete this dialog box.

Table 4-9. Label Box Fields and Descriptions

Field	Description
Name	Type a name in several different languages. In AM, this name appears in the Contact Template > Layout tab. In IM, this name appears when an agent or supervisor click the Contact tab.

Table 4-9. Label Box Fields and Descriptions

Field	Description
	Here's an example: English: **Home Address** French: **Adresse personnelle** German: **Heimadresse** If an agent selects French language when logging into IM, then CCA displays a field called "Adresse personnelle" when the agent views, edits, or searches for contacts. If an agent selects English when logging into IM, then CCA displays a field called "Home Address."
Associate Label with Action Category	From the drop-down menu, select an action to associate with this label. (Table 4-10 on page 4-50 provides a complete list of actions to associate with a label.) For example, to associate the "Email" label with an action to open an new email message using the contact's email address, follow these steps: 1. Enter **Email** as the **Label Name**. 2. Select **Email** from the **Associate Label with Action** list box. 3. Select **contacts.email** from the **Field Name** list box. Now, when an agent or supervisor views a contact in IM, the contact's email address appears as a hyperlink. When the agent clicks the hyperlink, IM opens a new mail message (using the agent's mail program) with the contact's email address in the "To" line. **Note**: If you select **Other**, the label will not be associated with an action.
Mandatory field	Click this box to make the associated action (identified in the previous field) mandatory.

Table 4-9. Label Box Fields and Descriptions

Field	Description
Country Code Field Name	This field appears in the Edit Label/Header dialog box only if you select one of the following from the **Associate Label with Action** drop-down menu: • Phone • Fax • Pager For these menu items, select **contacts.country** from the Country Code Field Name drop-down menu. Thus, when the agent views a contact in IM, the **contacts.country** field appears as a drop-down menu of country codes.
Field Name	Field names correspond to locations in the data source (such as a column in a database table or view) where information is stored. **Note**: When using the default system data source, CCA creates a set of fields. When using a custom data source, you must create the fields yourself.

10. For this example, use this information:

    Label Name: **First Name**
    Action: **Other**
    Field Name: **contacts.firstname**

11. Click **OK** to save your new label. The Add Display Templates screen reappears, showing the new field in the contact tab layout.

12. Follow these instructions to create 2 more labels:

    Label Name: **Last Name**
    Action: **Other**
    Field Name: **contacts.lastname**

    Label Name: **Home Phone**
    Action: **Phone**
    Field Name: **contacts.homephone**

13. When finished, the Layout tab reappears (Figure 4-25) showing the new information.

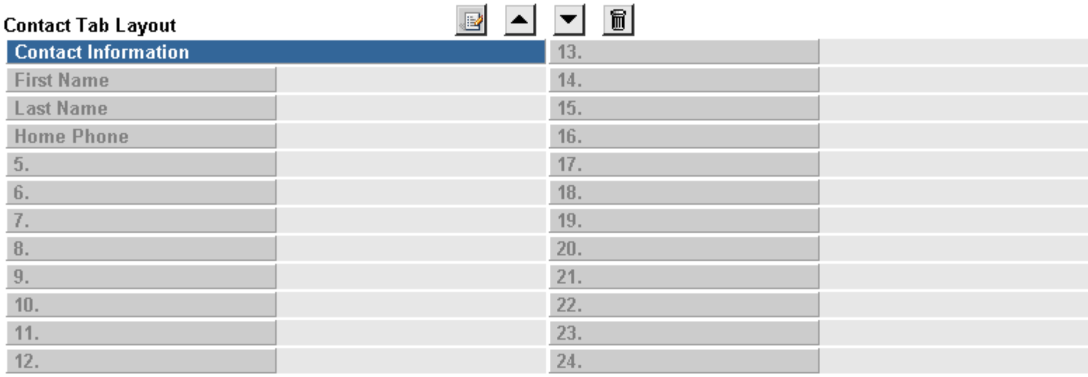


Figure 4-25 Sample Layout: One Header With Three Labels

To delete a label and header

Delete labels and headers by selecting the label or header and clicking the delete button (trash can icon).

To rearrange labels and headers

Rearrange labels and headers by clicking on the up or down arrows, or by clicking on the label or header and dragging it to a new position.

Viewing example complex layouts

The sample in Figure 4-25 shows a very simple layout. However, you can also create layouts that are more complex, such as with two headers in the same column (Figure 4-26) and multiple headers in two columns (Figure 4-27).

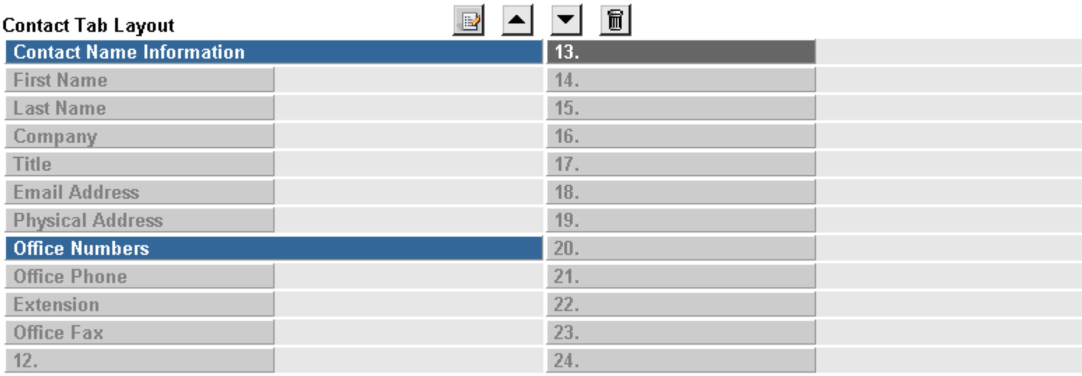


Figure 4-26 Sample Layout: Two Headers in Same Column

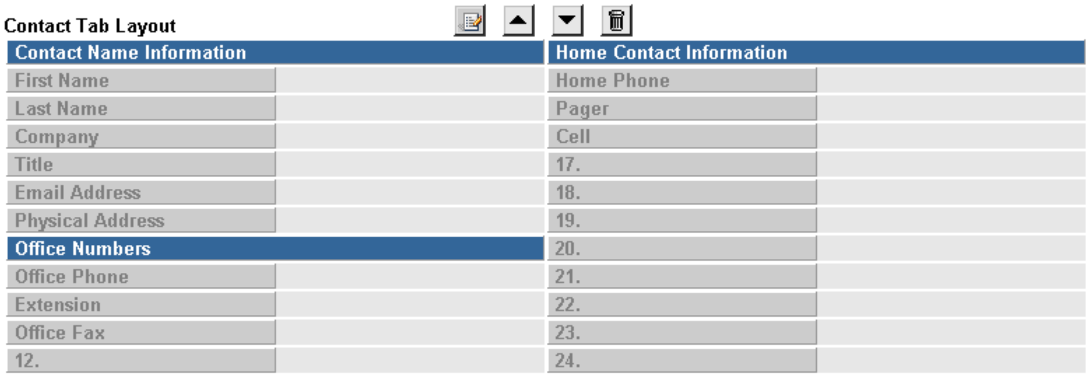


Figure 4-27 Sample Layout: Multiple Headers in Two Columns

Remember that the appearance of your layout is exactly what agents and supervisors see when viewing and editing contacts in IM.

Table 4-10 provides a description of the label action categories available from the “Associate Label with Action - Category” drop-down menu.

Table 4-10. Label Action Categories

List Box Selection	Action That Occurs in Interaction Manager
Email	The contact’s email address appears a hyperlink, so that when the agent clicks the hyperlink, IM opens a new mail message (using the agent’s mail program), with the contact’s email address in the “To” line.
Phone	The contact’s phone number appears as a hyperlink, so that when the agent clicks the hyperlink, IM dials the number.
Fax	The contact’s fax number appears as a hyperlink, so that when the agent clicks the hyperlink, IM dials the number.
Web Site	The Website appears as a hyperlink, so that when the agent clicks the hyperlink, IM launches a browser on the agent’s machine and opens the site.
Pager	The contact’s pager number appears as a hyperlink., so that when the agent clicks the hyperlink, IM dials the number.
External Application	A hyperlink to an external application appears, so that when the agent clicks the hyperlink, IM launches the application.

To select the columns the agent sees when viewing a list of contacts

1. In the Add Display Templates screen, click the **List Header** tab.

   The Add Display Templates - List Header screen (Figure 4-28) appears.

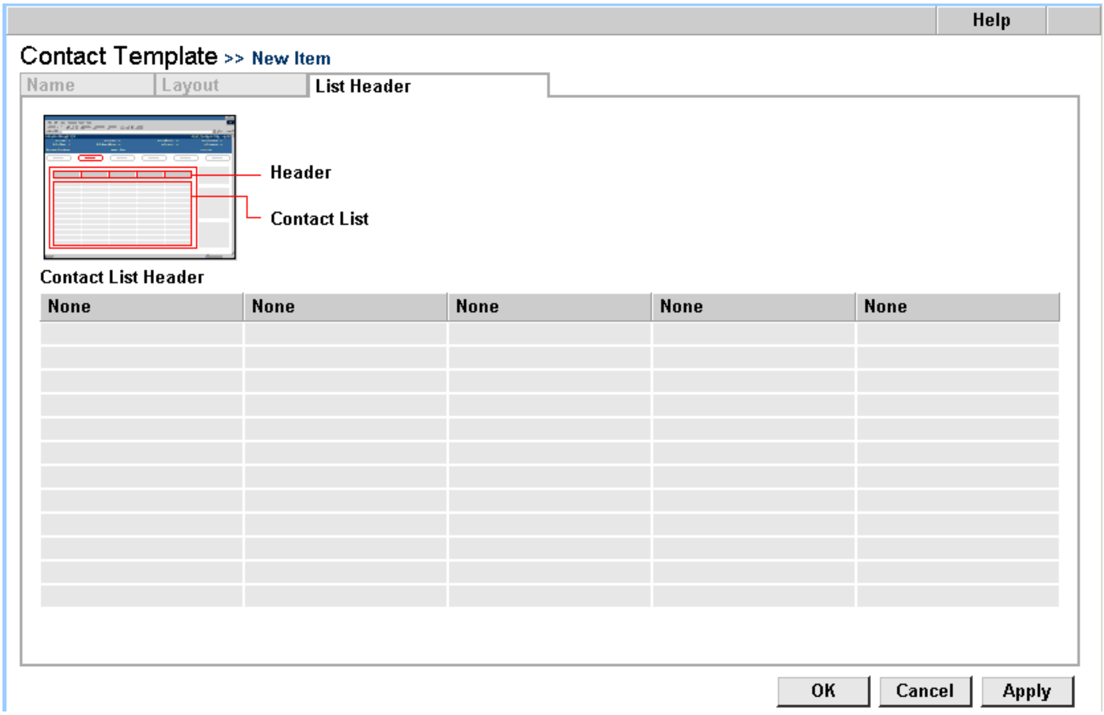


Figure 4-28 Add Display Templates - List Header Tab

2. Click any column heading (**None**).

   A list box appears (Figure 4-29) showing all of the labels you created in the Layout tab.

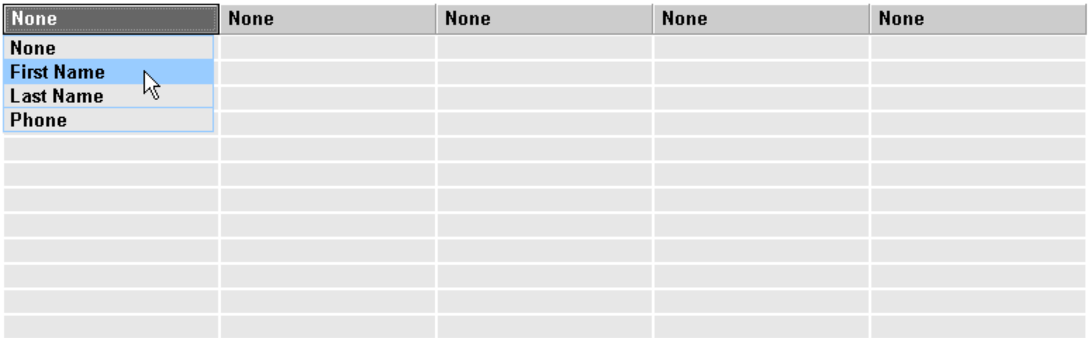


Figure 4-29 Example List Box With Your Labels

3. Select an item from the menu, which becomes the column heading. For example, select **First Name** from the pop-up list box. First Name appears as the first column heading.

4. Do the same for columns 2 and 3, selecting **Last Name** and **Phone Number**, respectively.

   When finished, the List Header tab displays the new column headings, as shown in Figure 4-30.

First Name	Last Name	Phone Number	None	None

Figure 4-30 Example List Header Tab

5. Click **OK** (or **Apply**) to save your changes.

Agents and supervisors must log out and log back into IM before they can see the changes.

Deleting a Custom Contact Template

You cannot delete System Templates, however you can delete **Contact Templates** that you have created.

To delete a custom contact template

1. Click **Libraries > Display Templates**. The Display Templates main screen (Figure 4-31) opens.

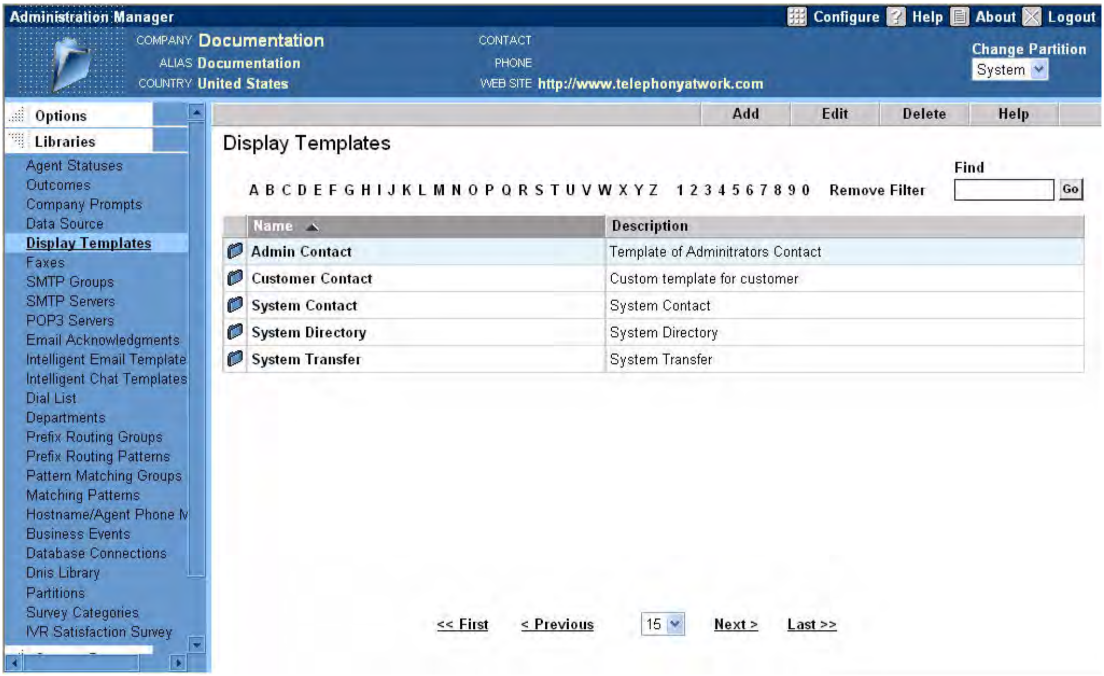


Figure 4-31 Display Templates Main Screen

2. Select the Contact Template you created and then click the **Delete** button. (You can also right-click on a Contact Template and select **Delete**.)

   A confirmation message (Figure 4-32) appears.

Figure 4-32 Delete Confirmation Message

3. Click **OK** to confirm the deletion.

Editing a Custom Contact Template

You cannot edit the default System Contact Template, but you can edit a contact template you made. Also, you cannot delete the default System Contact Template.

To edit your custom Contact Template

1. Click **Libraries > Display Templates**. The Display Templates main menu (Figure 4-31 on page 4-53) opens.

2. Select the template to change and click **Edit**. (You can also right-click on the template and select **Edit** or double-click the template.) The Edit Display Templates screen (Figure 4-33) opens.

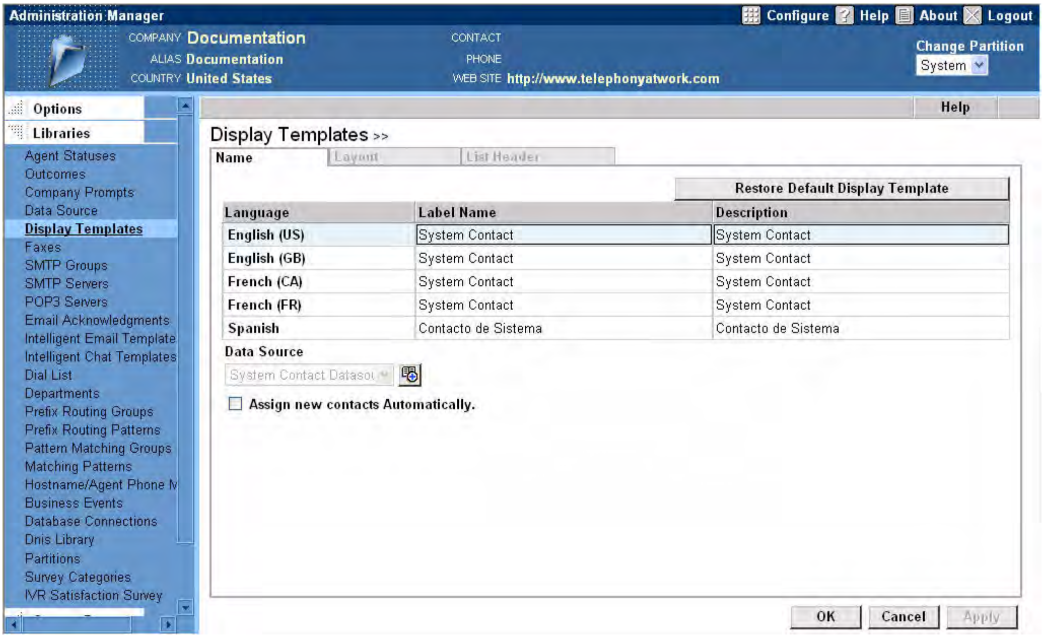


Figure 4-33 Edit Display Templates Screen

3. In the **Name** tab, modify the name and description of your custom Contact Template in different languages.

   This name is what agents and supervisors see after selecting a Contact Template in IM. See “Label Name” on page 4-40 for more information.

4. Click the **Layout** tab, where you can:

   - Change the options agents use.

See Table 4-8 on page 4-43 for information about customizing Agent access to contact information.

   - Create, delete, and edit labels and headers.

   - Rearrange labels and headers to organize the System Contact Template differently.

     A **Label** holds some information about a contact (such as first name, last name, phone number, and so on). Agents and supervisors complete these fields when adding or editing contact information.

     A **Header** (like a column header in a table) serves as a title for several fields (such as Contact Information or Additional Phone Numbers).

Instructions for changing Labels and Headers begins with Step 4 on page 4-43.

---

5. Click the **List Header** tab, so select the columns that agents see when viewing a list of contacts.

Instructions for changing the List Header starts in Step 1 on page 4-50.

---

6. Click **OK** or **Apply** to save your changes.

Agents and supervisors must log out and log back into IM before they can see any changes.

Editing the System Directory Template

The **System Directory Template** controls the layout and content of the **Company Directory** dialog box in IM. Agents and supervisors see this layout when viewing or searching in the Company Directory.

To edit the System Directory Template

1. Click **Libraries > Display Templates**. The Display Templates main menu (Figure 4-31 on page 4-53) opens.

2. Select the **System Directory Template** and click the **Edit** button. (You can also right-click on the **System Directory Template** and select **Edit**.) The Edit Display Templates screen (Figure 4-34) opens.

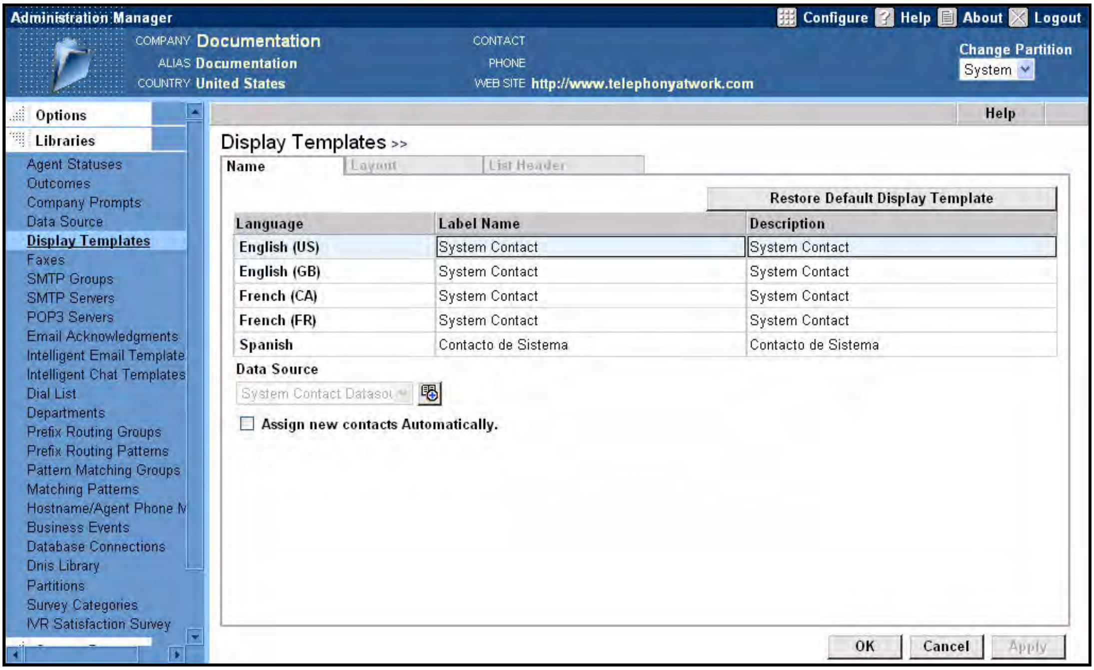


Figure 4-34 Edit Display Template Screen

3. Click the **Layout** tab, where you can:

- Change the options agents use. See the table Table 4-8 on page page 4-43 for information about customizing agent access to contact information.

- Create, delete, and edit labels and headers.

- Rearrange labels and headers to organize the System Directory Template differently.

  A **Label** holds some information about a contact (such as first name, last name, phone number, and so on). Agents and supervisors complete these fields when adding or editing contact information.

  A **Header** (like a column header in a table) serves as a title for several fields (such as Contact Information or Additional Phone Numbers).

Instructions for changing labels and headers begins with Step 4 on page 4-43.

---

4. Click **OK** (or **Apply**) to save the changes.

Editing the System Transfer Template

The **System Transfer Template** controls the layout and content of the **Transfer** dialog box in IM. Agents and supervisors see this layout when viewing or searching in the Transfer dialog box.

To edit the System Transfer Template

1. Click **Libraries > Display Templates**. The Display Templates main menu (Figure 4-31 on page 4-53) appears.

2. Select the **System Transfer Template** and click the **Edit** button. (You can also right-click **System Transfer Template** and select **Edit**.)

3. Click the **Layout** tab, where you can:

   - Change the options agents use. See the table Table 4-8 on page page 4-43 for information about customizing agent access to contact information.

- Create, delete, and edit labels and headers.

- Rearrange labels and headers to organize the System Transfer Template differently.

  A **Label** holds some information about a contact (such as first name, last name, phone number, and so on). Agents and supervisors complete these fields when adding or editing contact information.

  A **Header** (like a column header in a table) serves as a title for several fields (such as Contact Information or Additional Phone Numbers).

Instructions for changing labels and headers begins with Step 4 on page 4-43.

---

4. Click the **List Header** tab, where you can select the columns the agent sees when viewing a list of contacts.

If you click on any column heading **None**, a list box appears showing all of the labels you created in the Layout tab.

Instructions for changing the list header begins with Step 1 on page 4-50.

---

5. Click **OK** (or **Apply**) to save your changes.

Restoring a System Template

After making changes to any System Template, you can restore all default settings.

To restore a System Template

1. Click **Libraries > Display Templates**. The Display Templates main menu (Figure 4-31 on page 4-53) opens.

2. Select the **System Template** and click the **Edit** button.

3. In the **Name** tab, click the **Restore Default Contact Template** button.

Agents and supervisors must log out and log back into IM before they can see the changes.

Creating a Fax Library

With CCA, you can compile a library of pre-developed fax responses that agents can use to send to customers. The fax library ensures that your agents provide accurate and consistent responses to all customers.

You must store CCA fax responses as Tagged Image File Format (TIFF) files in the Fax Library. When saving your fax responses, select ***Class F*** with ***CCITT Group 3 1D*** compression to ensure compatibility with CCA and your telephony hardware.

To create a library of faxes

1. Click **Libraries** > **Faxes** > **Add** button.

   The Add Fax screen (Figure 4-35) opens.

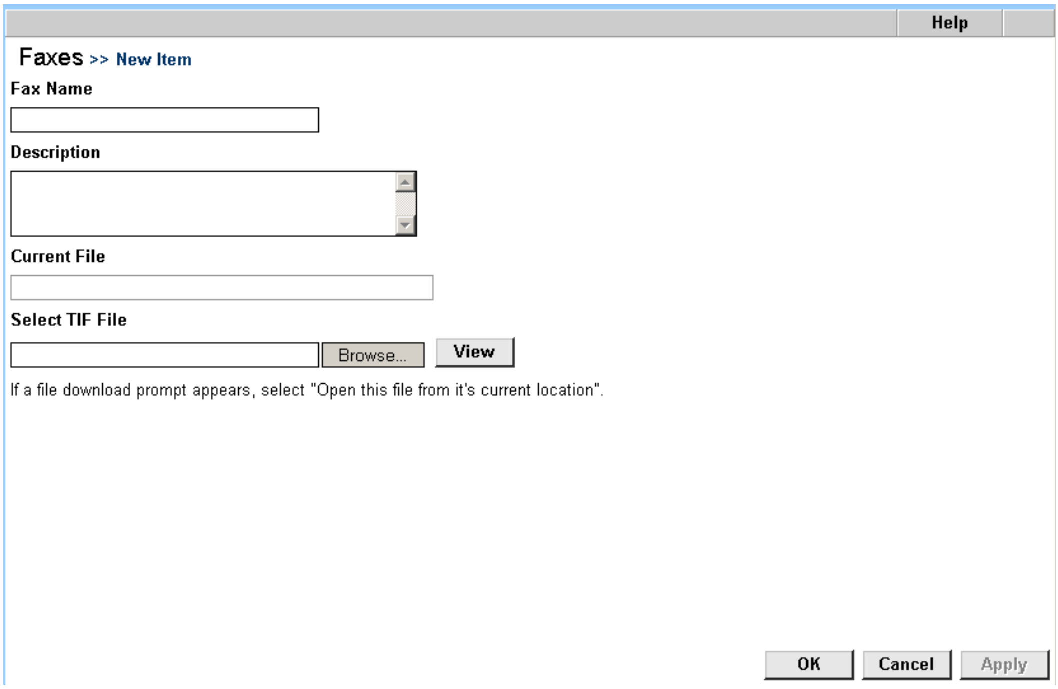


Figure 4-35 Add Fax Screen

2. In the FAX Name field, type a name for the fax.

3. In the Description text box, type a description for, purpose of, or contents of the fax.

The Current File box displays the filename of a previously entered fax.

---

4. In the Select TIF file text box, enter the filename and path to the image file to fax to the customer (or click **Browse** to locate the file on your computer or network.)

5. Click **View** to display the fax to verify that it is the one you want.

6. Click **OK**.

7. Repeat steps 1 through 7 to enter additional faxes.

Creating an SMTP Server Library

With CCA, you can compile a library of SMTP Server definitions for sending email traffic from agents to customers. From this library, specify multiple SMTP (outgoing) email servers for call center email functions.

CCA automatically balances email traffic loads by using servers in a round-robin (rotating) fashion. That is, if one server is busy handling email traffic, CCA uses the next server in the list of servers you supply.

To create a library of SMTP Servers

1. Click **Libraries** > **SMTP Servers** > **Add** button. The SMTP Server screen (Figure 4-36) opens.

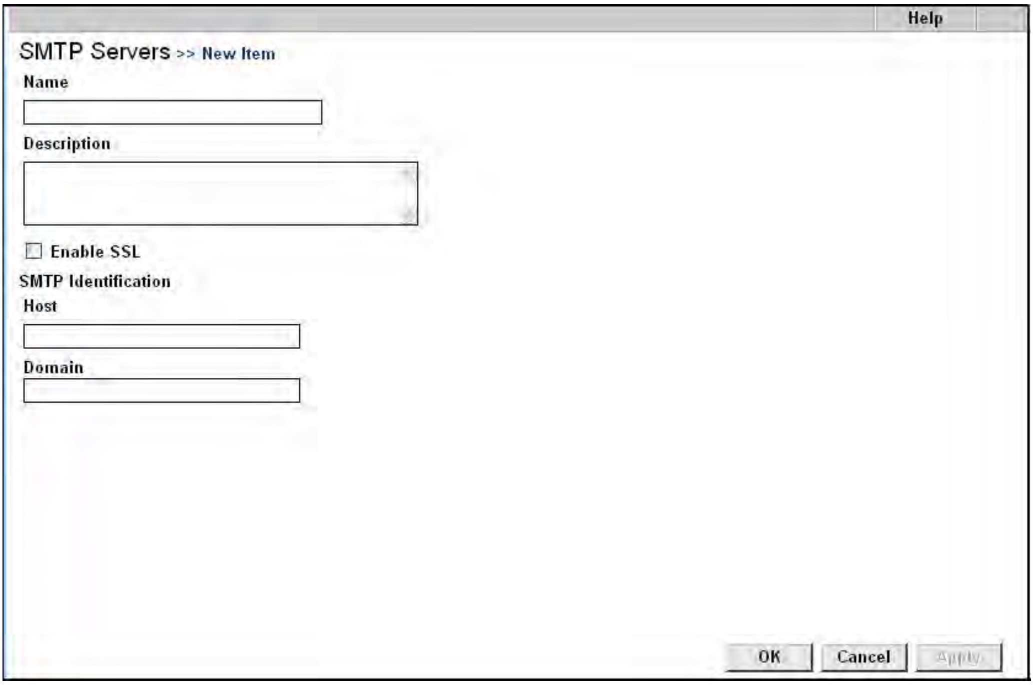


Figure 4-36 SMTP Servers Screen

2. In the Name text box, type a name for the SMTP server.

3. In the Description text box, type a description of this SMTP server.

4. Check the **Enable SSL** box to use a Secure Sockets Layer protocol for transmitting sensitive or confidential information securely over the Internet. The following must also exist:

   - The SMTP port is 25.

   - CA certificate location is <CCA installation directory>\tmp\cacert.pem

---

Support for secure SMTP connections to Mail Servers (using secure POP3) is supported for Win32 and Solairs applications only.

---

5. In the Host text box, type the name of the computer hosting the server.

6. In the Domain text box, type the network domain where this server resides.

Depending on the type of SMTP server, if authentication is turned off on the SMTP server and you do not enter anything in the Domain text box, a connection error may occur that will prevent CCA from sending any emails, faxes, or voicemails. In this case, all emails, faxes, and voicemails end up in the Mail Manager. See your Network Manager for more information.

---

7. Click **OK**.

8. Repeat steps 1 through 7 to enter additional SMTP servers.

Creating an SMTP Server Group Library

Create an SMTP Server Group Library with definitions, which CCA can use to identify the SMTP email servers when delivering email for email projects.

CCA automatically balances email traffic loads by using SMTP servers in a round-robin (rotating) method. That is, if one server is busy handling email traffic, CCA uses the next server in your group.

You must add SMTP Servers to CCA ***before*** creating a group of SMTP Servers. If you have not created an SMTP Server Library, see “Creating an SMTP Server Library” on page 4-62 before creating an SMTP Server Group.

To create a library of SMTP server groups

1. Click **Libraries** > **SMTP Groups** > **Add** button. The Add SMTP Groups screen (Figure 4-37) appears.

2. In the Name text box, type a name for the group of SMTP servers you are creating.

3. In the Description text box, type a description about this group of SMTP servers.

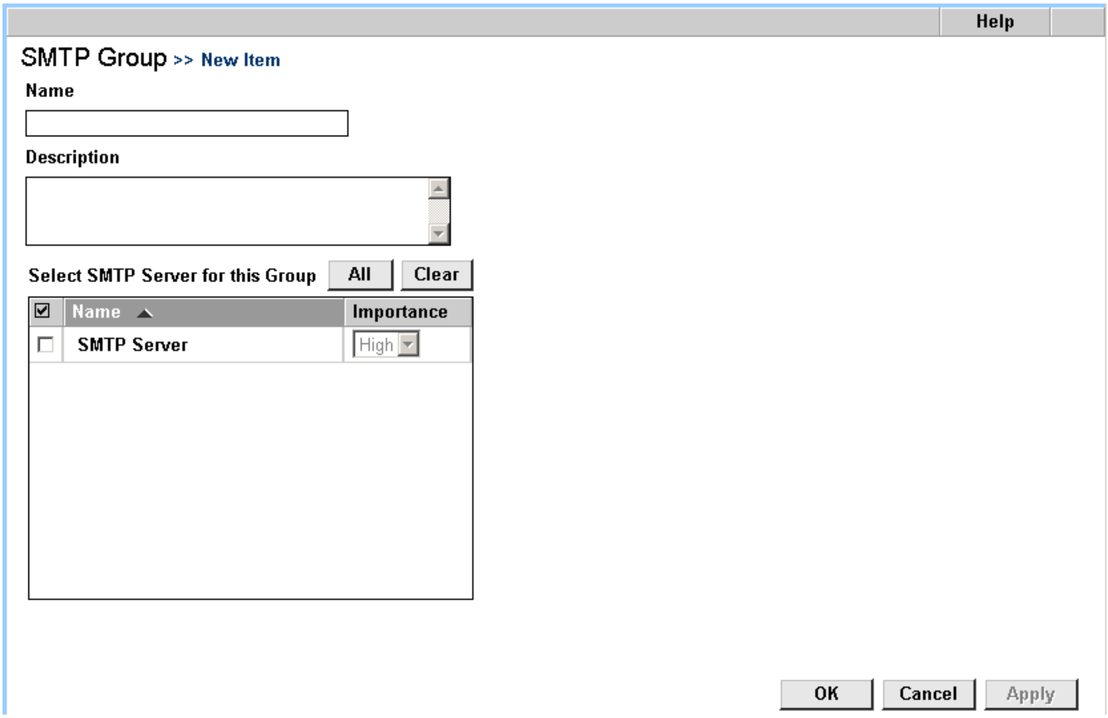


Figure 4-37 SMTP Group Screen

4. Check the servers to include in the group.

   a. From the Importance drop-down menu (next to each selected server):

      i. Choose **High** to use the server to handle email transactions under normal conditions.

      ii. Choose **Low** to use the server only if all other servers of High importance are unavailable.

5. Click **OK**.

6. Repeat steps 1 through 5 for all SMTP Server Groups required to handle outgoing email for the email Projects.

Creating a POP3 Server Library

Create a library of POP3 Server definitions, which CCA uses to receive email traffic from customers. Use the library to specify multiple POP3 (incoming) email servers for call center email functions.

> CCA automatically balances email traffic loads by using servers in a round-robin (rotating) method. If one server is busy handling email traffic, CCA uses the next server in the your list of servers. For example, if an email project identifies POP1, POP2, and POP3 and POP2 is busy or not responding, the email distributor checks POP1 first, then POP2, and then POP3. When the distributor finds POP2 to be not responding, the distributor sends an email to alarm and then checks POP3. This cycle continues, except when the distributor finds that POP2 is not responding a second time. In this case, the distributor does not send any emails to alarm.

Select more than one POP3 server only when sending email to the email address of the project. This way the email server for the account evenly distributes the email to different POP3 accounts on different hosts to ensure load balancing.

When you specify only one POP3 server, then email address of the project should also specify that POP3 account. This way, if a customer replies to the agent's email, which uses the email address specified in the project, the email goes to the correct POP3 account.

To create a library of POP3 servers

1. Click **Libraries** > **POP3 Servers** > **Add** button. The Add POP3 Servers screen (Figure 4-38) appears.
2. In the Name text box, type the name of the POP3 server.
3. In the Description text box, type a description of this POP3 server.
4. Check the **Enable SSL** box to use a Secure Sockets Layer protocol for transmitting sensitive or confidential information securely over the Internet. The following must also exist:
    - The POP3 secure port is 995.
    - CA certificate location is <CCA installation directory>\tmp\cacert.pem

Support for secure POP3 connections to Mail Servers (using secure POP3) is supported for Win32 and Solairs applications only.

5. In the Host text box, type the name of the computer hosting the server.

6. In the User text box, type a unique user name for CCA to use when logging into this POP3 server.

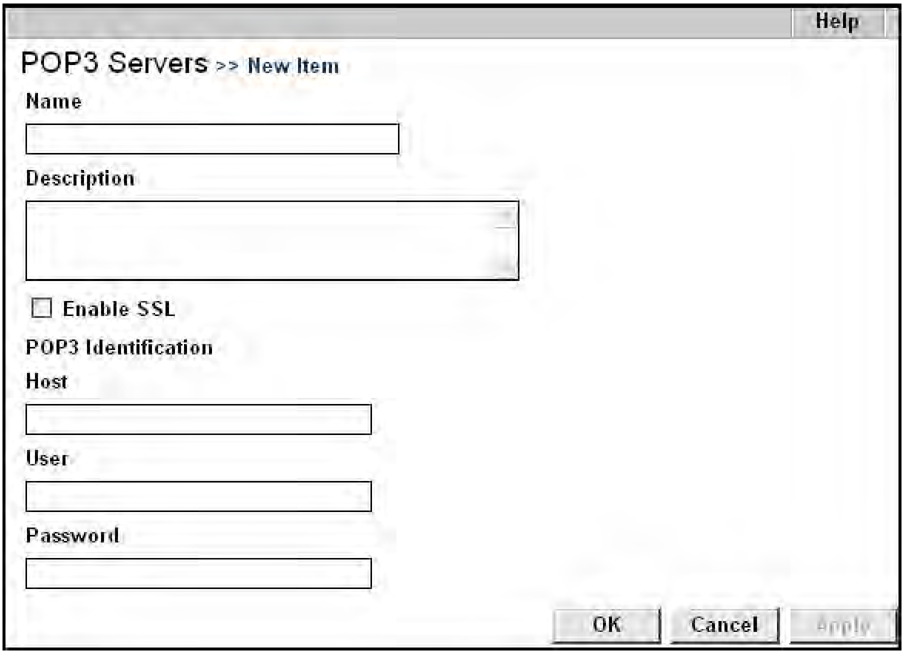


Figure 4-38 POP3 Servers Screen

7. In the Password text box, type a password for the user name provided in step 6.

8. Click **OK**.

9. Repeat steps 1 through 8 for all of the POP3 servers.

Creating an Email Acknowledgment Library

Compile a library of email responses, which CCA sends automatically in response to a customer who emailed the call center.

To create a library of email acknowledgments

1. From AM, click **Libraries** > **Email Acknowledgements > Add** button. The Add Email Acknowledgements screen (Figure 4-39) appears.

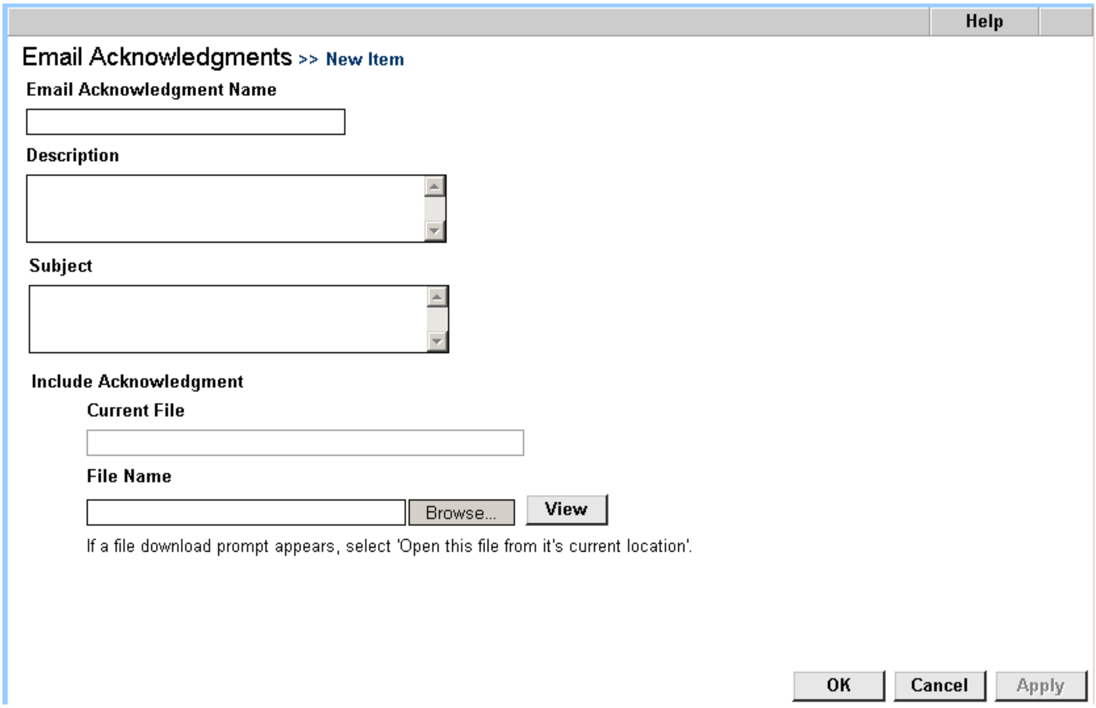


Figure 4-39 Email Acknowledgements Screen

2. In the Email Acknowledgement Name text box, type a name for this email response.

3. In the Description text box, type a description (or describe the purpose or contents) of this email response.

4. In the Subject text box, type a subject line for this response.

a. If the customer's original email subject line was blank, CCA uses the information in this text box for the subject line of the email.

b. If the customer's original email message contains a subject, CCA uses the customer's subject content.

5. In the File Name text box, type the name of the text file that contains the text to place into the body of this response email message.

6. Click the **Browse...** button to locate a file to use on your computer or network.

7. Click the **View** button to preview the file you have selected.

The file must be a text file (.txt) or a web file (.html).

---

8. Click **OK**.

9. Repeat steps 1 through 8 for all of email acknowledgments.

Creating an Intelligent Email Template Library

CCA uses Intelligent Email templates to scan incoming email interactions for specific key words and then sends automatic responses or provides suggested responses to agents.

When agents receive an email interaction, they can view a list of Intelligent Email templates along with the confidence score of each template (based on CCA's analysis of the content of the customer's email). The agent can then send the reply associated with the highest scoring template.

Intelligent Email templates are collections of logical "statements" consisting of combinations of words, which CCA searches when scanning incoming email interactions.

Compile a library to specify which Intelligent Email templates to use in your email projects. The templates identify the actions to take based on the content of customer's email inquiries.

To create a library of Intelligent Email Templates

1. Click **Libraries** > **Intelligent Email Templates** > **Add** button. The Add Intelligent Email Templates screen (Figure 4-40) appears.

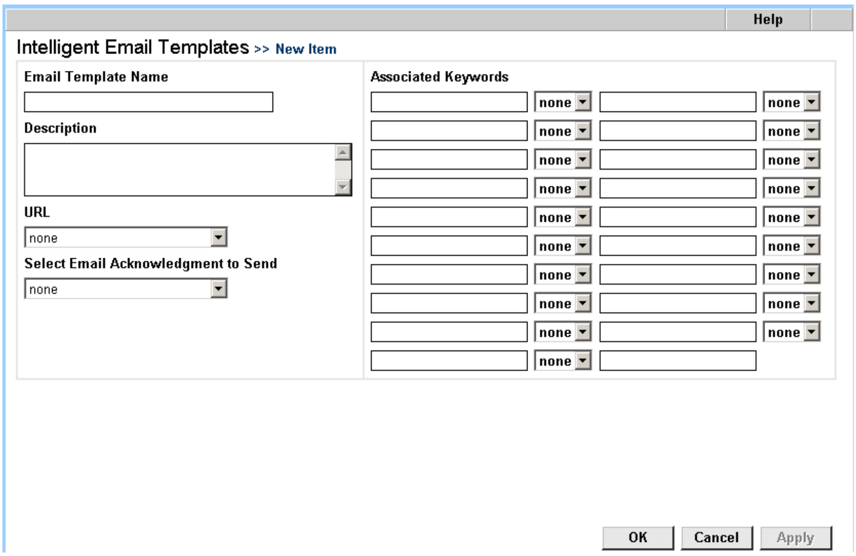


Figure 4-40 Intelligent Email Templates Screen

2. In the Email Template Name text box, type a name for the first Intelligent Email template.

3. In the Description text box, type a description of the template's purpose.

4. From the URL drop-down menu, choose the URL containing the email text for agents who receive an email from a customer where the customer's inquiries match the words or phrases in this template.

If there are no entries in the drop-down menu, then refer to **Intelligent Email** under "Creating a URL Library" on page 4-4.

---

5. From the Select Email Acknowledgment to Send drop-down menu, choose a response to automatically email to the customer (provided the email project is configured to send auto responses).

Also see "Creating an SMTP Server Library" on page 4-62 and "Adding Email Interactions to a Project" on page 10-66.

---

6. In the Associated Keywords boxes, type the search words for CCA to use when scanning the subject line and body of the customer's email message.

   a. For CCA to search using multiple words or phrases, you must connect the words using selections from the adjacent drop-down menu, where:

      i. **and** = email must contain all words
      ii. **or** = email must contain at least one of the words.
      iii. **none** = separates each logical statement.

Refer to "Example Intelligent Template Example" on page 4-72 for an explanation of how CCA uses this template when scanning an incoming email interaction.

---

7. Click **OK** and repeat steps 1 through 7 for all the necessary Intelligent Email Templates for the email projects.

To learn how to attach your Intelligent Email Templates to an Email Project, see "Email Tab - Select Intelligent Email Templates Subtab" on page 10-71.

Example Intelligent Template Example

When comparing the contents of a customer's incoming email or chat messages against the logical statements in your templates, CCA calculates an accuracy level or "score" between 0 (no statements are true) and 100 (all statements are true) for each template.

Consider the two Intelligent Email templates in Table 4-11:

Table 4-11. Example Two Intelligent Email Templates

Template A:	`red AND blue OR green NONE` `purple NONE`	(statement 1) (statement 2)
Template B:	`red AND blue OR yellow NONE` `purple NONE`	(statement 1) (statement 2)

The CCA Email Project, which uses the templates in Table 4-11, receives an email containing the following text:

"Hello: Please send me information about your GREEN unicycles."

CCA assigns Template A a score of 50 because the email contents contained a word appearing in 50% of the template statements. The first statement ("red AND blue OR green") was true, but the second statement ("purple") was false.

The score for Template B is 0 because the email contained no words in either the first statement ("red AND blue OR yellow") or the second statement ("purple"). You can:

- Configure CCA to send a reply to the customer automatically if one of your Intelligent Email Templates exceeds a specified score.
- Configure CCA to suggest email responses to your agents based on the Intelligent Email Template scores.

Also see "Adding Email Interactions to a Project" on page 10-66.

Creating an Intelligent Chat Template Library

CCA can use Intelligent Chat Templates to scan the content of incoming chat interactions for specific key words and then provide suggested responses to agents.

Upon receiving the chat interaction, agents can then view the list of Intelligent Chat Templates and the confidence score CCA assigns each template (based on analysis of the content of the customer's chat text).

The highest scoring template is appears first. However, the agent can send a reply associated with any of the matching templates.

Intelligent Chat Templates are collections of logical "statements" consisting of combinations of words that CCA searches for when scanning the content of incoming chat interactions.

Once you compile a library, you can choose which Intelligent Chat Templates to use in chat projects. You can also associate one or more Intelligent Chat Templates with a specific chat project, to control which responses to suggest to agents handling chat customers.

To create a library of Intelligent Chat Templates

1. Click **Libraries** > **Intelligent Chat Templates** > **Add** button.

   The Add Intelligent Chat Templates screen (Figure 4-41) appears.

2. In the Chat Template Name text box, type a name for the first Intelligent Chat Template.

3. In the Description text box, type a description of the template's purpose.

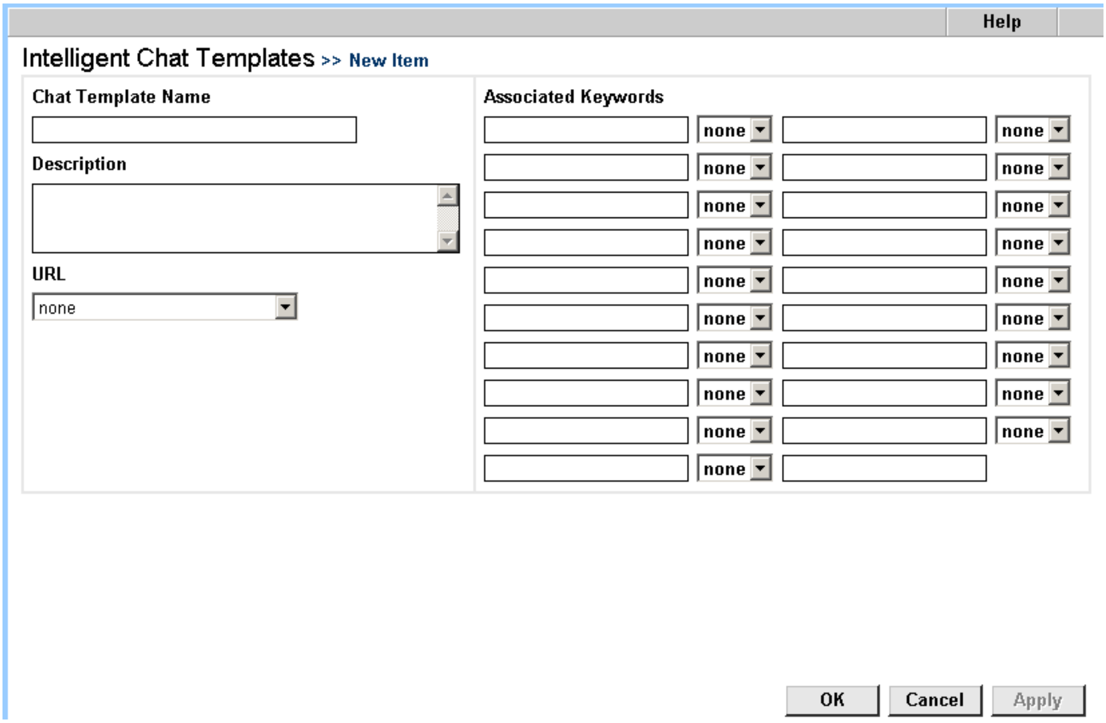


Figure 4-41 Intelligent Chat Templates Screen

4. From the URL drop-down menu, choose the Intelligent Chat URL entry to recommend to agents who receive a chat interaction from customers whose inquiries match the words or phrases in this template.

5. In the Associated Keywords boxes, type the search words for CCA to use when scanning the subject line and body of the customer's email message.

a. For CCA to search using multiple words or phrases, you must connect the words using selections from the adjacent drop-down menu, where:

   i. **and** = email must contain all words

   ii. **or** = email must contain at least one of the words.

   iii. **none** = separates each logical statement.

Refer to “Example Intelligent Template Example” on page 4-72 for an explanation of how CCA uses this template when scanning an incoming email interaction.

---

6. Click **Apply**.

7. Repeat steps 1 through 6 to enter all necessary the Intelligent Chat Templates for all Chat Projects.

8. Click **OK**.

To learn how to add your Intelligent Chat Templates to a Chat Project, see page 10-58.

Creating a Department Library

Create a library of Departments to represent the various business departments in which the company's agents work. Though CCA does not consider departments when routing interactions, department assignments make agents easier to locate using the Company Directory in IM.

For example, when agents handling customers in the IM need to transfer a call to another agent or transfer to an agent dialog box, the Department Library identifies the department in which each agent works. This additional search category makes it easier for agents to locate other agents in the company.

To create a library of departments

1. Click **Libraries** > **Departments** > **Add** button.

   The New Departments screen (Figure 4-42) appears.

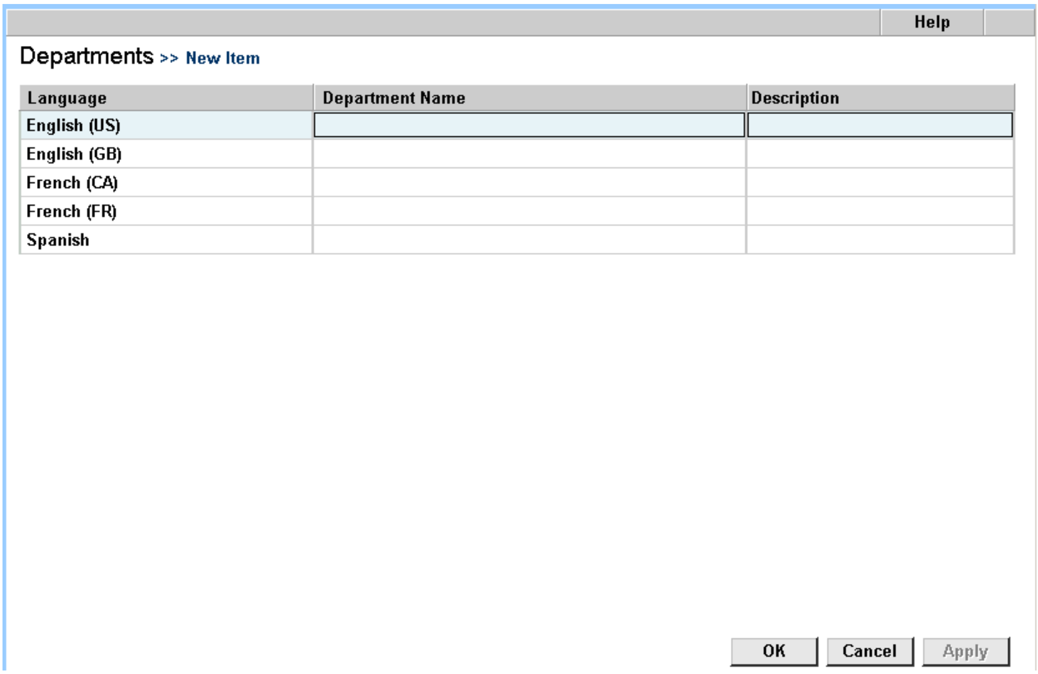


Figure 4-42 New Departments Screen

2. In the Department Name and Description columns, type a department name and description for each language the call center supports.

3. Click **OK**.

4. Repeat steps 2 through 3 to add a definition for all the departments in your company.

For information on specifying the department to which agents and supervisors belong, see “Creating Administrator, Agent, and Supervisor Accounts” on page 6-1.

Creating an Prefix Routing Pattern Library

Prefix Routing Groups:

- Predictive Projects uses prefix routing to call only selected phone numbers in a Dialer List.

See “Examples of Predictive Dialing Schedules” on page 10-28 for more information.

- Allow CCA to route phone customers to specific call center areas, based on the number from which the customer is calling. By creating a custom routing strategy based on the customer’s phone number, you can provide services that are tailored to the needs of customers from specific regions or locales.

  For example:

  Consider a Phone Project that takes callers from every state in the US. Callers from all states, except New York for example, must be routed to your standard agent pool for normal processing. Callers from New York, however, require handling by agents specially trained to process orders from New York customers.

To meet these routing requirements, you can define Prefix Routing Patterns (such as '212*') to match all calls originating from New York numbers. The Phone Project routes callers from numbers that do not match the New York number pattern to the standard agent pool and re-routes New York callers to another Project, which implements a custom routing strategy to send these callers to the appropriate agents.

To create a Prefix Routing Pattern Library

1. Click **Libraries** > **Prefix Routing** > **Add** button.

   The New Prefix Routing Patterns screen (Figure 4-43) appears.

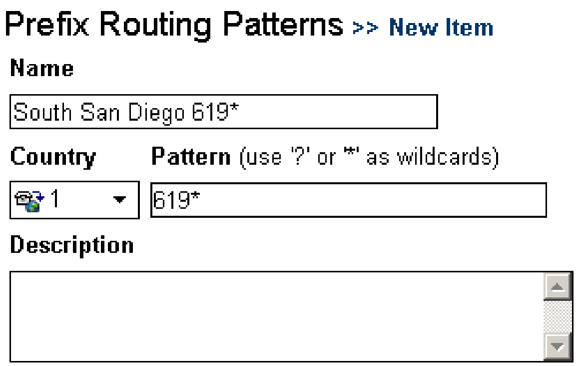


Figure 4-43 Prefix Routing Patterns Screen

2. Use the information in Table 4-12 to complete the Prefix Routing Patterns screen.

Table 4-12. Prefix Routing Patterns Fields and Descriptions

Field	Description
Name	Type a name for this pattern. Create a name that reflects the geographical region of numbers you expect to match the pattern, or a name that reflects the purpose of the pattern.
Country	From the drop-down menu, select a country code to match. CCA flags calls made from this country for re-routing to another project.

Table 4-12. Prefix Routing Patterns Fields and Descriptions

Field	Description
Pattern	Type a phone number pattern. Use the '*' wildcard character to match all digits in zero or more positions of the number. For example, enter **9*** to match all numbers beginning with **9**, including '900-123-4567,' '988-765-4321,' '999-123-4567,' and so on. **Note**: This pattern does not match calls from '888-854-4224' or any other number that does not begin with **9**. Use the **?** wildcard character to match all digits in a single position of the number. For example, enter **90?1234567** to match the phone number '123-4567' in all area codes beginning with **90**, including '901,' '902,' '903,' up to '909.' **Note**: This pattern does not match the number '910-123-4567' or any other number that does not begin with **90**.
Description	Type a description for the pattern to help identify it quickly in the pattern library.

3. Click **OK**.

Creating a Prefix Routing Group Library

A **Prefix Routing Group** is a collection of Prefix Routing Patterns. With Prefix Routing Groups, you can quickly implement strategies to route calls originating from different geographic regions to Projects created specifically for handling callers from those regions.

You cannot create a Prefix Routing Group until you have created at least one Prefix Routing Pattern. See “Creating an Prefix Routing Pattern Library” on page 4-77 for more information.

To create a Prefix Routing Group Library

1. Click **Libraries** > **Prefix Routing Groups** > **Add** button.

   The Add Prefix Routing Groups screen (Figure 4-44) appears.

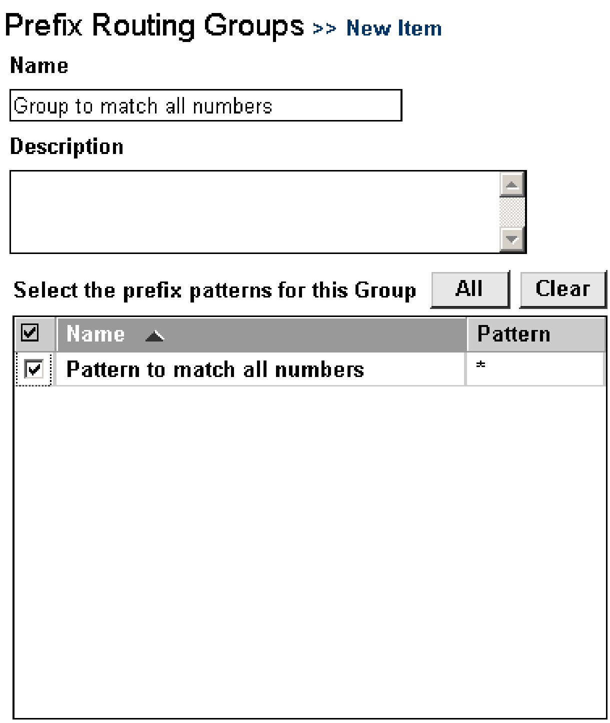


Figure 4-44 Prefix Routing Groups Screen

2. Use the information in Table 4-13 to complete the **Prefix Routing Groups** screen.

Table 4-13. Prefix Routing Groups Fields and Descriptions

Field	Description
Name	Type a name for this Prefix Routing Group. Create a name that reflects the geographic region represented by the Prefix Routing Patterns you plan to include in this group.
Description	Type a description for this Prefix Routing Group to help quickly identify it in the Prefix Routing Group Library.
Select the prefix patterns for this Group	Check the Prefix Routing Patterns to match against the caller's phone number. If the customer's number matches one of the checked patterns, CCA re-routes the call to the specified Project (see "Routing Phone Interactions Based on the Caller's Number" on page 10-13.

3. Click **OK**.

4. Repeat steps 2 through 3 to create all the Prefix Routing Groups necessary to meet the call center's custom routing needs.

Creating a Matching Patterns Library

Matching Patterns support features like Predictive Dialing, where you want to call only selected customers in a Dialer List.

For example, to call customers where a string column in the Dialer List (City, State, Time Zone, and so on) matches a specific pattern, use a Matching Pattern. See “Examples of Predictive Dialing Schedules” on page 10-28 for more information.

To create a Matching Patterns Library

1. From AM, click **Libraries** > **Matching Patterns** > **Add** button. The Add Matching Patters screen (Figure 4-45) appears.

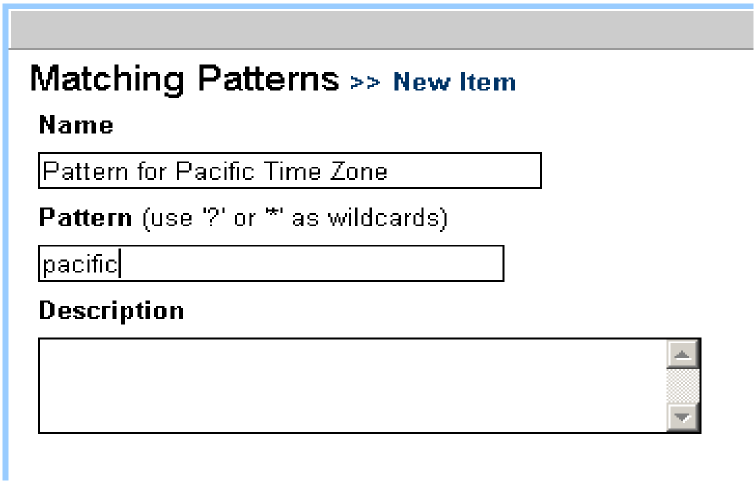


Figure 4-45 Matching Patterns Screen

2. Use the information in Table 4-14 to complete the **Matching Patterns** screen.

Table 4-14. Matching Patterns Fields and Descriptions

Field	Description
Name	Type a name that reflects the purpose of this pattern.

Table 4-14. Matching Patterns Fields and Descriptions

Field	Description
Pattern	Type a string pattern. Use the * (wildcard) character to match all characters in zero or more positions of the number.
Description	Type a description for this pattern to help quickly identify it in the Matching Patterns Library.

3. Click **OK**.

4. Repeat steps 2 through 3 to create all the Matching Patterns the call center needs.

Creating a Pattern Matching Group Library

A Pattern Matching Group is a collection of ***Matching Patterns***. See "Examples of Predictive Dialing Schedules" on page 10-28 for more information.

You cannot create a Pattern Matching Group until you create at least one Matching Pattern. See "Creating a Matching Patterns Library" on page 4-82 for more information.

To create a Pattern Matching Group Library

1. Click **Libraries** > **Pattern Matching Groups** > **Add** button. The Add Pattern Matching Groups screen (Figure 4-46) appears.

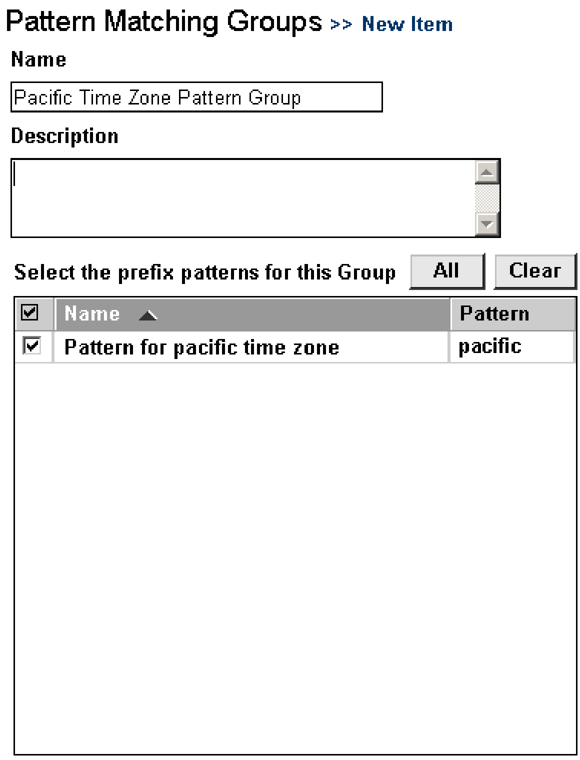


Figure 4-46 Pattern Matching Groups Screen

2. Using the information in Table 4-15, complete the **Pattern Matching Groups** screen.

Table 4-15. Pattern Matching Groups Fields and Descriptions

Field	Description
Name	Type a name for this Pattern Matching Group.
Description	Type a description for this Pattern Matching Group to help quickly identify it in the library.
Select the prefix patterns for this Group	Check the Matching Patterns that to include in this group.

3. Click **OK**.

4. Repeat steps 2 through 3 to create all the Pattern Matching Groups the call center needs.

Hostname/Agent Phone Mapping

To connect a call to an agent, CCA must know:

- Which computer the agent is using.
- What phone is associated with that computer.

Usually CCA gets this information when:

- The agent logs into IM. During login, CCA sends the agent's name and computer hostname to the server.
- The agent uses the Configuration dialog box in IM **or** the Administrator uses the **Options** > **Agents** > **Phone** screen to tell the server which phone the agent is using.

This process works well in call centers where agents use the same computer and phone every day. But in some call centers, agents may move from one computer and phone to another. In this case, every time the agent logs in, they must go to the Configuration dialog box and identify their phone number to the application, or an Admin must do this for them (using AM). It also assumes that the agent or Admin knows the IP addresses and extension, address, or ID of every phone and computer.

To make life easier in this type of call center, AM provides a Hostname/Agent Phone Mapping feature. With Hostname/Agent Phone mapping, you can associate a computer with a phone so that, when an agent logs into IM on a machine, the server:

- Retrieves the agent's name and the computer hostname when the agent logs into IM.
- Performs a lookup to determine which phone is associated with the computer that the agent is using.

This is all the information that the server needs. By associating a phone with a computer, CCA can gather this information no matter which computer the agent is using.

To create a hostname/agent phone mapping

1. Click **Libraries** > **Hostname/Agent Phone Mapping** > **Add** button.

   The New Hostname/Agent Phone Mapping screen (Figure 4-47) appears.

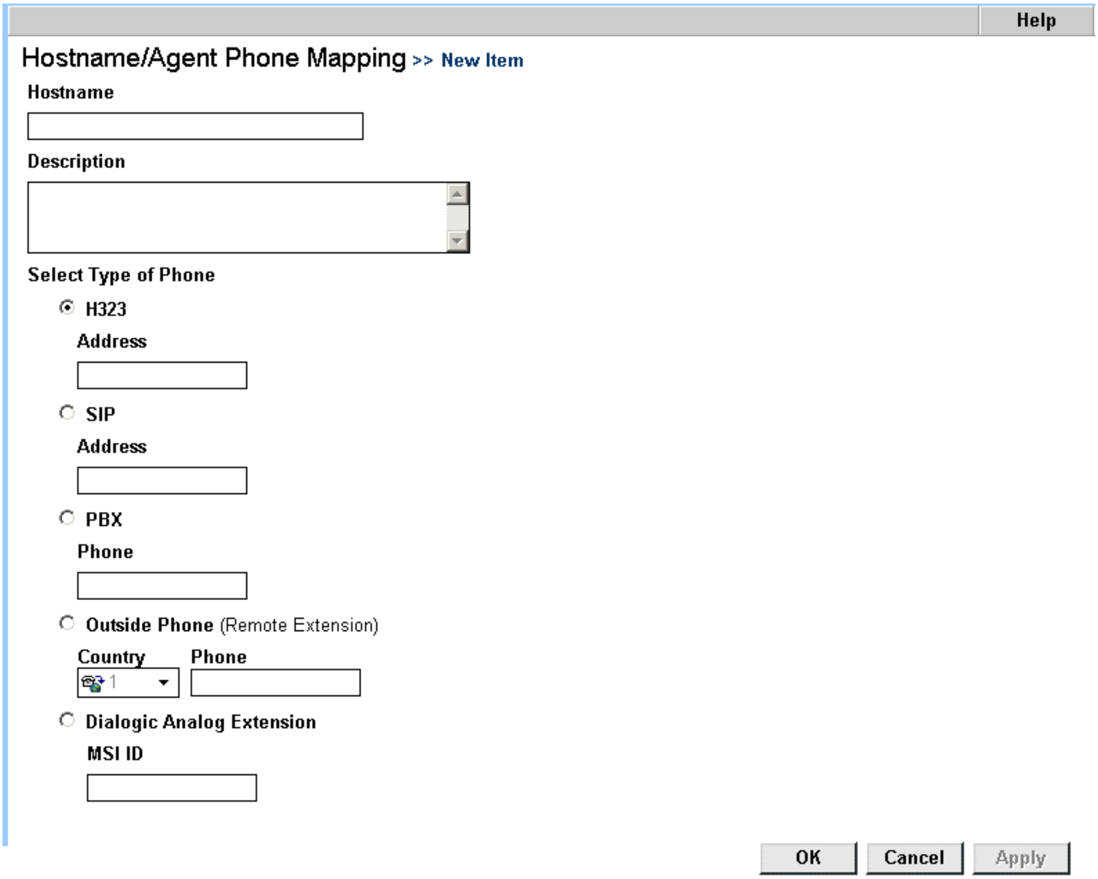


Figure 4-47 Hostname/Agent Phone Mapping Screen

2. Using the information in Table 4-16, complete the **Pattern Matching Groups** screen.

Table 4-16. Pattern Matching Groups Fields and Descriptions

Field	Description
Hostname	Type the hostname of an agent's computer.
Description	Type a description for the mapping.
H323	Click if the agent uses an H323 system and then type the IP address in Address box.

Table 4-16. Pattern Matching Groups Fields and Descriptions

Field	Description
SIP	Click if the agent uses a SIP system and then type the IP address in Address box
PBX	Click if the agent is a member of a Public Branch Exchange system and then type the agent's PBX extension number in the Phone box.
Outside phone	Click if the agent works remotely and then type the agent's country code and telephone number in the Country and Phone boxes, respectively.
Dialogic Analog Extension	Click if the agent is a member of a MSI system and then type their MSI ID number in the MSI ID box. **Note**: Users may select to have their MSI extensions to work Off Hook. There is no dial tone and beeps play for an incoming call. With Off Hook, users can also have ACD calls auto-accepted without having to answer their headset per call.

3. Click **OK**.
4. Repeat steps 2 through 3 to create all the Hostname/Agent Phone Mappings the call center needs.

Customizing Prompts

Create your own custom greetings and prompts for the touch-tone menus callers use to navigate your call center. You can also customize the prompts CCA provides to match your business practices.

This chapter describes how to:

- Record, save, and implement prompt files
- Customize the system greetings and messages CCA provides

What are Prompts?

Prompts are sound recordings (in .wav file format) that CCA plays to greet and inform callers dialing into your company. CCA uses two types of prompts:

- System Prompts
- Custom Company Prompts

System Prompts are prompts CCA supplies to support core CCA features. **Custom Company Prompts** are prompts you create to support call center features that are unique to your company (such as touch-tone menus or workgroup greetings).

Each prompt type also has rules CCA uses to determine which prompt to play in different situations.

System Prompts Overview

System prompts are general purpose prompts, which are not necessarily unique to a specific call center company, project or workgroup.

CCA provides a set of system prompts, which were recorded using a female voice. You can use these supplied system prompts in your call center with no customization. You can also customize any editable system prompt to meet the specific needs of your call center (by using a different voice, changing the wording, and so on).

CCA divides system prompts into the following logical groups based on how CCA uses them:

- Call Center Prompts
- Date and Time Prompts
- Number Prompts
- Agent Voicemail Prompts
- Company Directory Navigation Prompts
- Project Option Prompts
- Workgroup Option Prompts
- Call Blocking Prompts

For a list of prompts in each group, see “Prompts Grouped by Application” on page 5-16.

For a complete list of the supplied system prompts, see “All Prompts by File Name” on page 5-27.

Custom Company Prompts Overview

Custom Company Prompts are prompts you create to greet callers who dial into a project. They describe the touch-tone menus and other options so that callers can navigate the call center. Therefore, a Custom Company Prompt is any prompt that describes a unique characteristic of your call center, including:

- Greetings identifying the company name or the workgroup name
- Menus for navigating to workgroups in the company
- Menus for navigating to specific agents in the company

Before you can use Custom Prompts in CCA, you must record the prompts and save them in the Prompt Library.

Instructions for adding the prompts to the Company Prompt Library are in “Creating a Company Prompt Library” on page 4-16.

Creating a Custom Prompt

Custom Prompts can replace a supplied System Prompt or you can add them to the Company Prompt Library. You can then use any Custom Prompt from the library with any customized CCA features (such as touch-tone menus, workgroup greetings, and so on).

To create a custom prompt for your call center, you must:

- Plan the Prompt
- Record the Prompt
- Save the Prompt

Plan the Prompt

Before recording the prompt, make sure you understand how CCA uses it in the call center. Make sure you know:

- If your prompt replaces a CCA System Prompt. (See “Customizing System Prompts” on page 5-9.)

or

- If your prompt supports options and touch-tone menus created specifically for the call center’s projects and workgroups. (See “Creating a Company Prompt Library” on page 4-16.)

- The name for the prompt as it appears in the CCA Company Prompt Library or in the CCA System Prompts.

- The key-presses (tones) the caller can enter in response to the prompt, if the prompt describes a touch-tone menu. (See “To create a Standard Menu” on page 8-11.)

- The action CCA takes in response to each tone

- The text for the prompt, including the text describing both the key-press and the action (such as “Press one to reach Sales”).
- The name of the prompt file.

Record the Prompt

Use a high quality sound recording software package (Adobe Audition™, GoldWave Inc.’s GoldWave™, and so on) when recording new prompts. Use a high quality microphone and sound card to produce the highest quality recordings.

Save the Prompt

To ensure compatibility with CCA, save your prompt recording to a file on your hard disk or network with the following characteristics:

Soft switch Installation:

Format: CCITT uLAW
Sampling Rate: 8,000 Khz (800 Mhz)
Resolution: 8 bits
Channels: 1 (mono)

Dialogic Installation:

Format: Windows PCM
Sampling Rate: 8 Khz
Resolution: 8 bits
Channels: 1 (mono)

In Solaris, the MP3 Server converts the Mulaw files to PCM before converting .wav files to MP3.

Setting Up a Music Broadcast

Customers can be put on hold in different ways, and while a customer is waiting on hold you can configure the system to play audio to them:

- A customer can be on hold while they wait in a Workgroup queue. While they wait, you can play a hold prompt. See “Select Prompts for this workgroup” on page 7-17, for more information.

- After a customer has been connected to an Agent, the Agent can put them on hold. While the customer waits, you can play a prompt or streaming audio (music broadcast).

    - See “Play Audio on Hold Using” on page 10-5 to learn how to play a prompt to a customer who has been put on hold by an Agent.

    - Follow the instructions in this section if you want to set up a music broadcast (streaming audio) to a customer who has been put on hold by an Agent.

To play streaming audio (music broadcast)

To play streaming audio for a caller on hold you must have a PC, or some other sound player device that can:

- Play music continuously.

- Make a SIP call to the machine where your music server resource is running.

Use Network Manager to create a Music Server resource. The Music Server receives the audio stream from your player device and re-broadcasts it.

1. Start Network Manager and view by host.

2. Add a new resource. The New Server dialog box (Figure 5-1) appears.

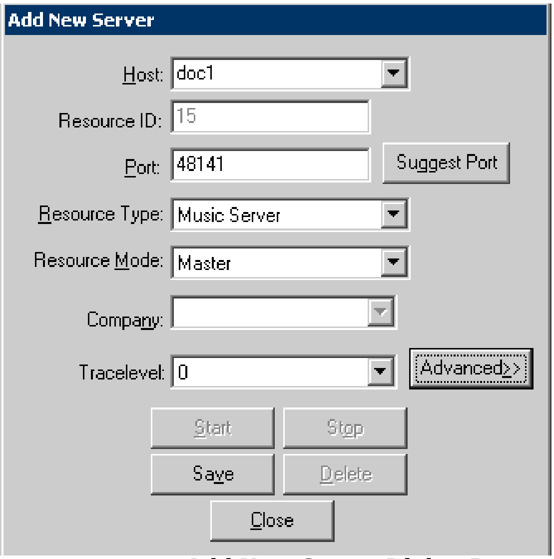


Figure 5-1 Add New Server Dialog Box

3. Complete the fields in the Add New Server dialog box.

4. Click the **Advanced** button. The Music Server dialog box (Figure 5-2) appears.

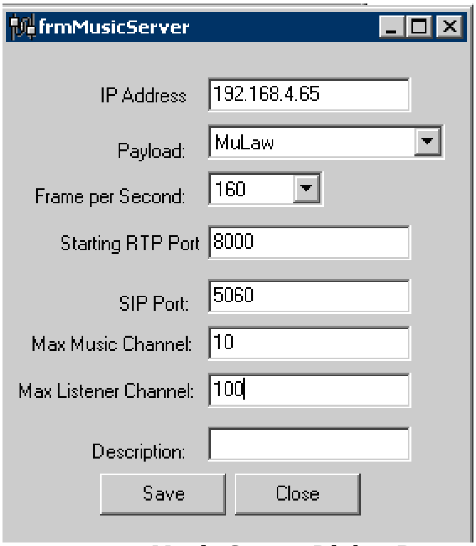


Figure 5-2 Music Server Dialog Box

5. Complete the fields in the Music Server dialog box.

> In this example, we configured the Music Server to receive and broadcast 10 different audio streams (Max Music Channel). For example, use one channel for Jazz, another for Pop Music, and so on.

6. Configure the sound player device. If you use a PC as the audio streaming device, you can put a CD of music in the machine, and run an audio player software in “repeat” mode.

   You also must configure your PC so that it makes a SIP call to the Music Server resource you created in the previous step. A simple way is to install a “software phone” on your PC. For this example, use SJPhone (Figure 5-3).

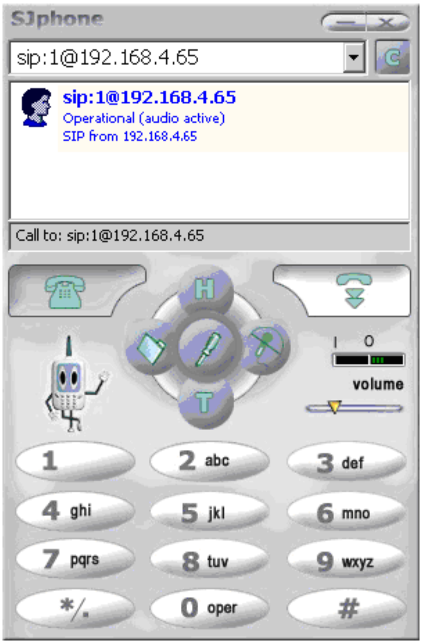


Figure 5-3 SJPhone Dialog Box

a. The syntax of the SIP call is:

sip:<***Channel Number***>@<***IP address*** you entered in the Music Server dialog box>

For example:

SIP:1@192.168.4.65

b. You can enter any number as the Channel Number, as long as you do not use that Channel Number for any other audio stream.

In this example, we configured the Music Server resource for a max of 10 audio streams. So, theoretically we could set up 10 boxes that make 10 SIP calls, with 10 unique Channel Numbers, that would send our Music Server 10 different audio streams.

7. Configure Administration Manager:

a. Login to Administration Manager as a **Netadmin**.

b. View the list of companies.

c. In the Go To... menu, select **Music Broadcast**, then click the **Add** button.

d. In the Music Broadcast screen, enter a Name, Description and a SIP URL. The name and description can be anything, but the SIP URL must use this syntax:

sip:CH<***channel number from SIP phone***>@<***IP address*** you entered in the Music Server dialog box>

For example:
sip:CH1@192.168.4.65

i. The Channel Number matches what we entered in our SJPhone.

ii. The **CH** must be ***uppercase***.

iii. The IP address is what you entered in the Music Server dialog box in Network Manager.

e. Now, go back to the list of companies (**Go To..** > List of Companies) and select a company.

f. Go to **Options** > **Projects** > **General** tab > “**Play Audio on Hold Using**” and select the **Music Broadcast** button. In the list box, the Music Broadcast entry that you just created appears.

You can also select a Music Broadcast in a campaign.

Customizing System Prompts

Customize the CCA System Prompts to meet the call center needs by modifying the voice, language, or text.

To customize a System Prompt

1. Plan, record, and save the prompt file to replace the system prompt. (See “Creating a Custom Prompt” on page 5-3).

2. Click **System Prompts** and then click the group to customize.

To view a list of prompts in each group, see “Prompts Grouped by Application” on page 5-16.

For example, to customize a prompt in the Agent Voicemail group, click **System Prompts** > **Agent Voicemail** CCA displays the list of prompts for the group you chose.

3. From the list of prompts, click the prompt to customize, and then click **Edit**. The Edit (customize) System Prompt screen (Figure 5-4) appears.

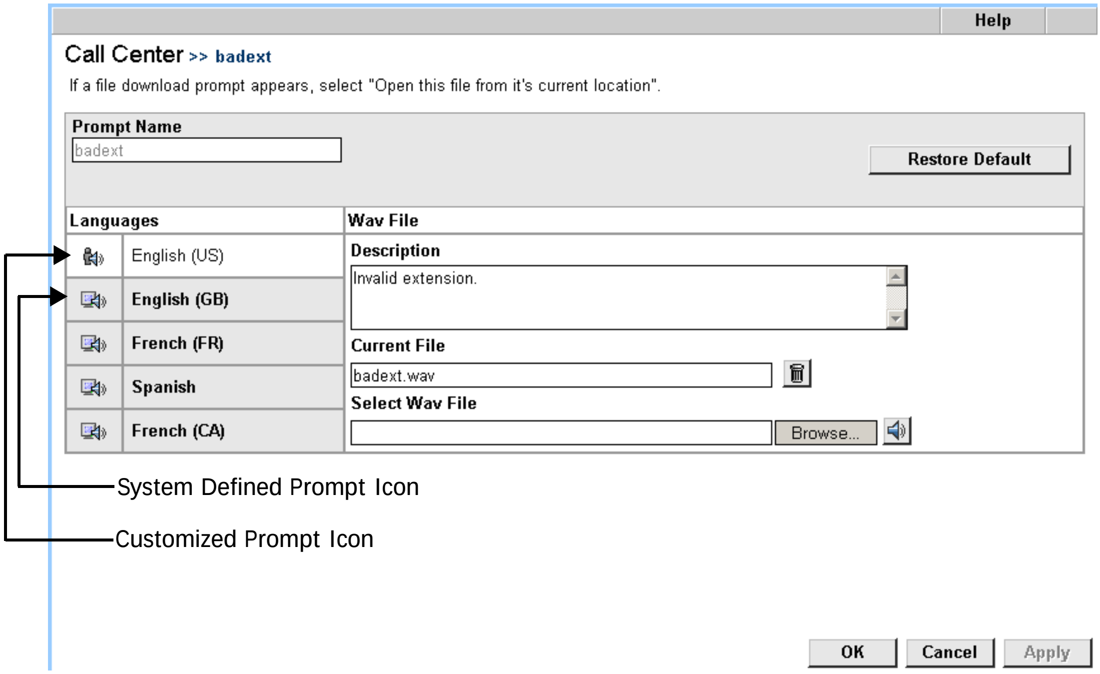


Figure 5-4 Editing (Customize) System Prompt Screen

4. Click the language in which you recorded your prompt.

5. In the Description text box, type a description of the prompt. This description appears in the prompt list after setting AM to the language supported by this prompt.

6. Enter the file name and path to the prompt in step 1 (or click **Browse...** to choose the file from your computer or network).

7. Click to listen to the recording to verify that it is correct (or click to cancel all changes and return to the Prompt list).

8. Repeat steps 4 through 7 for each language for which you recorded a prompt.

9. Click **OK**.

   CCA stores the new prompt in the CCA database and plays it for callers (or agents), as necessary.

If you modify only one or a few of the system prompts, but leave the others in their default condition (female, business-friendly voice), your customers might hear “mixed” prompts.

For consistency across all prompts, consider customizing all system prompts in each language using the same speaker or using the system prompts as provided with CCA.

Example: Jay’s Unicycle Company

In this example, the CCA Administrator for “Jay’s Unicycle Company” creates a project called “Sales,” which contains two workgroups, “English” and “Spanish” for handling English-speaking customers and Spanish-speaking customers, respectively.

The following sections describe the steps an Administrator must perform to create or customize prompts to route callers to the appropriate workgroup.

For illustration, some of the steps in this example refer to AM features discussed in later chapters of this manual. These chapters discuss how to set up projects and workgroups that make use of prompts recorded earlier using the procedures discussed in this chapter.

To create a Company Prompt for routing to a workgroup

As callers dial into Jay’s Unicycle Sales Phone Project, the Administrator wants to play a prompt giving the caller the option to be routed to either the Spanish-speaking workgroup or to the English (U.S.)-speaking workgroup. The Administrator performs the following steps to accomplish this routing task:

1. Records and saves the following prompt, describing the caller’s language choices, to the local hard disk. (See “Creating a Custom Prompt” on page 5-3.)

```
“Thank you for calling Jay’s Unicycles Sales Department!
Press one for English. Presione el dos para español.”
```

2. Adds the prompt file to the Company Prompt Library under the name “Choose Workgroup.” (See “Creating a Company Prompt Library” on page 4-16).

   Because this prompt determines the language of the caller, the Administrator must place this prompt in the default language for the Project, which in this example is English (U.S.).

3. Creates a touch-tone menu that plays the “Choose Workgroup” prompt recorded in Step 1 and defines the actions to take when the caller presses one or two. (See “To create a Standard Menu” on page 8-11.)

4. Creates a Phone Project (Figure 5-5) to route the caller to the “Choose Workgroup” menu defined in step 3. (See “Adding Phone Interactions to a Project” on page 10-5.)

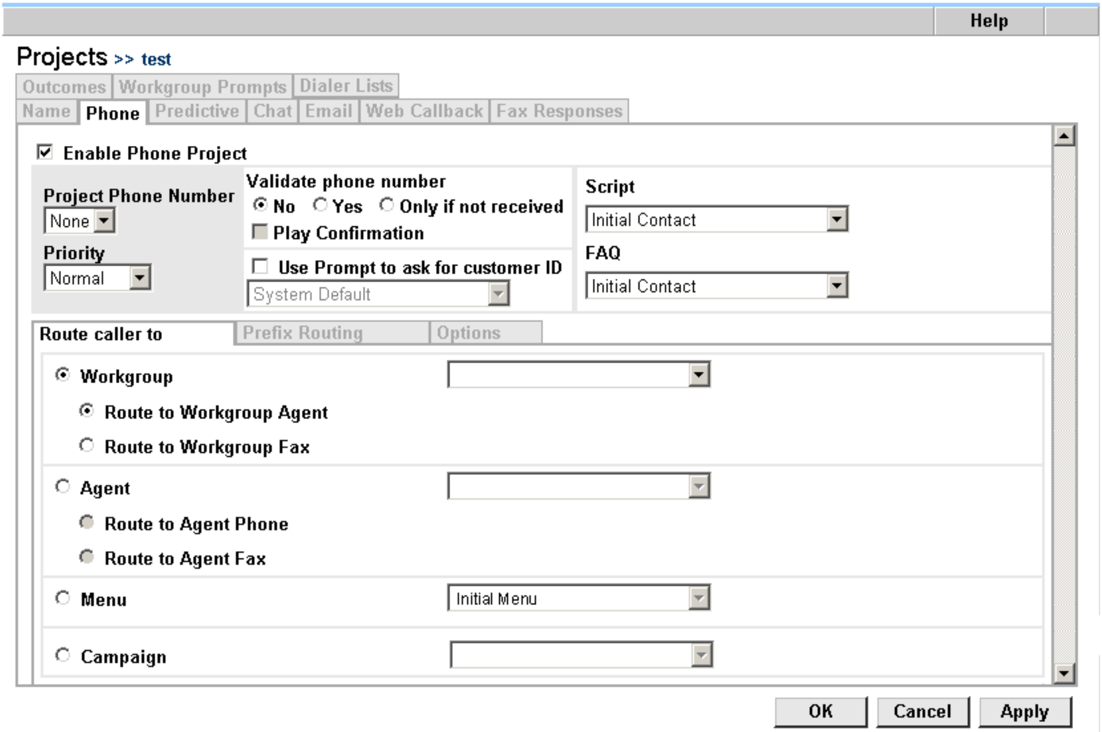


Figure 5-5 Setting up a Phone Project to Route Callers to a Menu

In this case, each response routes the caller to a second menu, which plays another prompt describing the menu choices for routing to a specific agent within that workgroup. (See "To create a prompt for routing to a specific agent within a workgroup" below).

To create a prompt for routing to a specific agent within a workgroup

In this example, assume the caller reaching the Project described above selects option **1** (English-speaking Workgroup) from the "Choose Workgroup" menu. The project would route the caller directly to the English (US) Workgroup, where the caller would wait in a queue for the next available agent in the workgroup.

For our example, assume the Administrator wants to allow the caller to reach a specific agent in the workgroup. To do this, the Administrator must route the caller to a second menu that describes the direct-to-agent routing options within the English (US) workgroup. The caller can choose from this menu to be connected to a specific agent in the workgroup.

The Administrator performs the following steps to accomplish this routing task:

1. Records and saves the following prompt to their local hard disk. (See "Creating a Custom Prompt" on page 5-3.)

`"You've reached Jay's Unicycles Sales Department. Press one for Ashley. Press two for Fred. Press three for Tom. Press four for Scott. Press nine to repeat this menu."`

2. Adds the prompt file to the Company Prompt Library under the name "Choose Agent." (See "Creating a Company Prompt Library" on page 4-16).

   Because the caller selected English as their language, the Administrator need only specify a wave file recorded in U.S. English for the "Choose Agent" prompt. If, however, the Administrator wishes to create a menu that allows Spanish speaking callers to choose to be routed to a specific agent, the Administrator must specify a wave file recorded in Spanish for the "Choose Agent" prompt.

3. Creates a touch-tone menu that plays the "Choose Agent" prompt recorded in Step 1 and defines the actions to take (Figure 5-6) when the caller presses each valid key. (See "To create a Standard Menu" on page 8-11.)

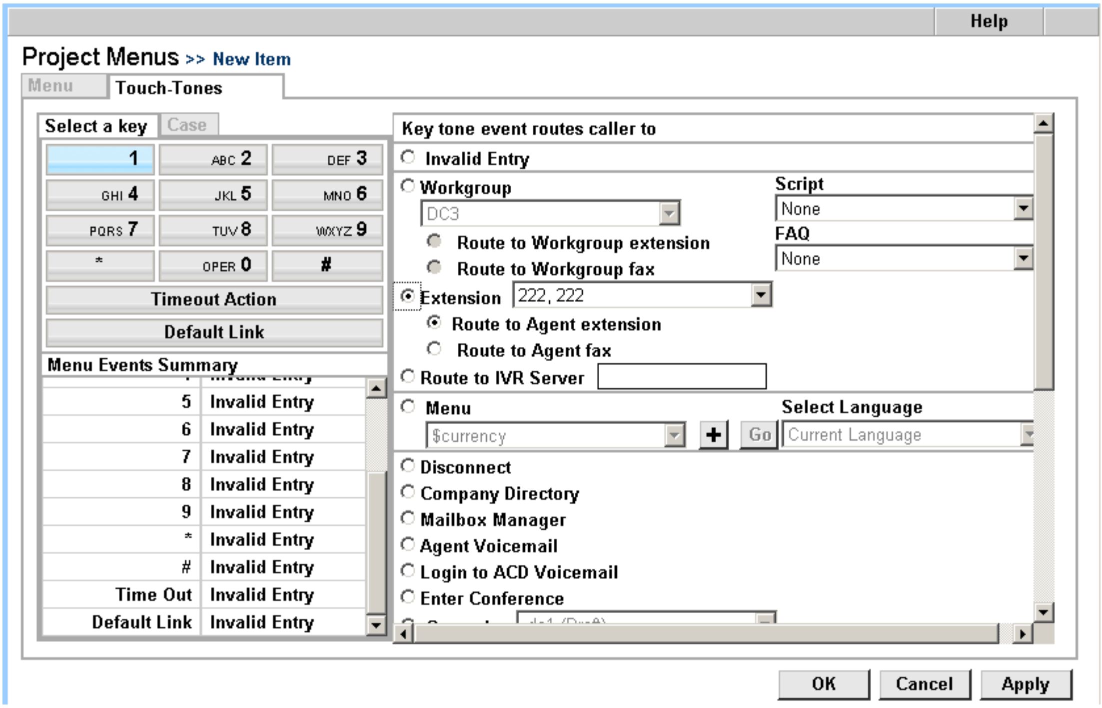


Figure 5-6 Press 1 to Route Caller to Specific Agent in a Workgroup

To customize a System Prompt

When CCA routes callers to a workgroup, the caller hears the System Workgroup Option Prompts. (For a list of these prompts, see "Workgroup Option Prompts" on page 5-22.)

If the Administrator does not customize these prompts, the caller hears CCA's default recording (business-friendly female voice) in the default language for the project.

In this example, assume the Administrator wants to change the default Workgroup Option Prompts to match the voice used to create the menu prompts in the Company Prompt Library. The first prompt customized is the **Play Estimated Wait Time** prompt. (See "Play estimated wait time" on page 7-15.)

The Administrator changes the Play Estimated Wait Time prompt from a female voice speaking the default text "*your estimated wait time is...*", to a male voice speaking slightly different text to match the conventions used in their company.

The Administrator performs the following steps to customize the prompt:

1. Records and saves the following prompt to their local hard disk or network. (See “Creating a Custom Prompt” on page 5-3.)

“A representative will be available in approximately...”

2. Replaces the English (U.S.) version of the “Estimated Wait Time” Workgroup Option System prompt with the new prompt created in Step 1. (See “Customizing System Prompts” on page 5-9.)

CCA now plays the customized prompt for all callers reaching the workgroup.

Restoring System Prompts

After customizing a System Prompt, you can restore it to the original prompt later, if conditions change.

To restore a System Prompt

1. Click the **System Prompt** group containing the prompt to restore. For example, to restore a prompt in the Agent Voicemail group, click **Agent Voicemail**.

   CCA displays the list of prompts for the group you chose. Prompts that are available to restore are identifiable by the absence of a bullet in the **System Defined** column of the list.

2. Select the prompt to restore and click **Edit**.

3. Click the **Restore Defaults** button.

CCA restores the original system prompt in all languages, indicated by a bullet in the **System Defined** column of the prompt list.

Prompts Grouped by Application

The following sections provide all the CCA prompts within the call center environment, grouped by application or purpose.

Call Center Prompts

Call Center Prompts (Table 5-1) are sounds or messages CCA plays to callers or agents attempting to make calls to or from the system.

Table 5-1 Call Center Prompts

File Name (.wav)	Default Recording	Default Application
badext	“Invalid extension”	Plays for customers who dial an unassigned extension number.
errmsg	“If you would like to make a call, please hang up and try again. If you need help, hang up and then dial your operator.”	Plays for agent if the phone is off hook and no keys are pressed.
invalidext	“Invalid extension, please hang up and try your call again”	Played for agents who dial an invalid extension when attempting to call another agent.
remoteagent	“This call has been forwarded from the call center. To accept this call, press one.”	Agent option **Play announcement to agent.** (See “Play announcement to agent” on page 6-15 for information on when CCA plays this prompt for agents.)

Date and Time Prompts

CCA uses Date and Time Prompts (Table 5-2) to build messages requiring a date or a time stamp (such as those CCA plays for agents retrieving their voicemail messages).

Table 5-2. Date and Time Prompts

File Name (.wav)	Default Recording	Default Application
am	“a.m.”	Message time stamp.
april	“April”	Message time stamp.
august	“August”	Message time stamp.
day01 - day31	“First” through “Thirty-first”	Message time stamp.
december	“December”	Message time stamp.
february	“February”	Message time stamp.
january	“January”	Message time stamp.
july	“July”	Message time stamp.
june	“June”	Message time stamp.
march	“March”	Message time stamp.
may	“May”	Message time stamp.
november	“November”	Message time stamp.
october	“October”	Message time stamp.
pm	“p.m.”	Message time stamp.
september	“September”	Message time stamp.

Number Prompts

CCA uses Number Prompts (Table 5-3), the digits from 0 (pronounced as “oh”) through 99 (pronounced as “ninety-nine”) to build any greeting or message requiring a number.

Table 5-3. Number Prompts

0 - 99	“oh” through “ninety-nine”

Agent Voicemail Prompts

CCA plays Agent Voicemail Prompts (Table 5-4) for agents when are setting up or retrieving their voicemail messages. With the exception of **goodafternoon**, **goodevening**, and **goodmorning**, callers do not hear these prompts.

Table 5-4 Agent Voicemail Prompts (Part 1 of 2)

File Name (.wav)	Default Recording	Default Application
at	"at"	Agent Voicemail retrieval
entermailbox	"Please enter your mailbox number, followed by the pound key."	Agent Voicemail retrieval
enterpassword	"Please enter your password, followed by the pound key."	Agent Voicemail retrieval
goodafternoon	"Good Afternoon."	Agent Voicemail retrieval
goodevening	"Good Evening"	Agent Voicemail retrieval
goodmorning	"Good Morning"	Agent Voicemail retrieval
heardnewmsg	"You have heard all of your new messages."	Agent Voicemail retrieval
heardsavedmsg	"You have heard all of your saved messages."	Agent Voicemail retrieval
hundred	"hundred"	Agent Voicemail Retrieval
invalidmp	"The password you entered does not match the mailbox you selected"	Agent Voicemail retrieval
listennewarcvm	"Press 1 to listen to your new voicemail messages, press 2 to listen to your saved voicemail messages, press star to return to the main menu"	Agent Voicemail retrieval
mailboxmainmenu	"Press 1 to retrieve your voicemail messages, faxes and emails, press 2 to record or rerecord your voicemail greeting, press 9 to repeat these choices"	Agent Voicemail retrieval
mailserverdown	"The system is unable to connect you to the mail server, you may continue into the system and do anything you would ordinarily do except receive voicemail messages."	Agent Voicemail retrieval
msgdeleted	"Message deleted"	Agent Voicemail Retrieval
msgreceivedon	"Message received on"	Agent Voicemail Retrieval

Table 5-4 Agent Voicemail Prompts (Part 2 of 2)

File Name (.wav)	Default Recording	Default Application
msgsaved	“Message saved”	Agent Voicemail Retrieval
msgsent	“Message sent”	Agent Voicemail Retrieval
newmessage	“New message”	Agent Voicemail retrieval
newmessages	“New messages”	Agent Voicemail retrieval
nomessages	“You have no messages in your mail box”	Agent Voicemail retrieval
nonewmessages	“You have no new messages”	Agent Voicemail retrieval
nosavedmessages	“You have no saved messages”	Agent Voicemail retrieval
pleasehold	“Please hold while we connect you to the Mail Server.”	Agent Voicemail retrieval
replymailmenu	“To repeat this message, press two. To save this message, press three. To delete this message, press four. To return to the main menu, press star. To repeat these choices, press nine.”	Agent Voicemail retrieval
savedmessage	“Saved message.”	Agent Voicemail retrieval
savedmessages	“Saved messages.”	Agent Voicemail retrieval
selectgreeting	“To listen to your busy message press one, to record or rerecord your busy message press 2, to listen to your recorded name press 7, to record or rerecord your recorded name press 8, To repeat these choices press 9, to return to the main menu press star”	Agent Voicemail setup
thousand	“Thousand”	Agent Voicemail Retrieval.
unknowndate	“The system is not able to retrieve the date and time of this message.”	Agent Voicemail retrieval
youhave	“You have”	Agent Voicemail retrieval

Company Directory Navigation Prompts

CCA plays Company Directory Navigation Prompts (Table 5-5) for callers who reach a project which has a menu option allowing the caller to reach an agent by choosing from a company directory. (For instructions on creating this menu, see “Company Directory” on page 8-16.)

Table 5-5. Company Directory Prompts

File Name (.wav)	Default Recording
entername	“Please enter the last name of the person you wish to reach using your touch-tone telephone keypad. For the letter “Q”, use the number seven. For the letter “Z”, use the number nine.”
extnumber	“Extension number.”
nopeople	“There are no names that match your selection”
select	“Press any key when you hear the name of the person you wish to reach.”
selectdir	“People matching your selection.”
thereare	“There are “
transferto	“Please hold while I transfer you to “

Project Option Prompts

CCA plays Project Option Prompts (Table 5-6) only if the caller reaches a project with the following options:

- Follow Me Forwarding (see page 10-12)
- Ask for Customer ID (see page 10-8)
- Validate Phone Number (see page 10-7)

Table 5-6 Project Option Prompts (Part 1 of 2)

File Name (.wav)	Default Recording	Project Option
customeridentered	“The customer id number you entered is”	**Ask for customer ID**

Table 5-6 Project Option Prompts (Part 2 of 2)

File Name (.wav)	Default Recording	Project Option
customeridnum	"Please enter your customer id number followed by the pound key" (see "Use Prompt to ask for customer ID" on page 10-8 for information on replacing this prompt with a prompt from your Prompt Library)	**Ask for customer ID**
_welcome	"Hello, and thank you for calling."	**Ask for customer ID** and **Validate Phone Number**
anotherlocation	"To try to reach this person at another location, press one. To send this person a voicemail message, press two." See "Enable Follow Me" on page 10-12.	**Follow Me** (played for *Customer* if Agent does not answer primary extension and **Follow Me** is enabled)
clientnumconfirm	"If this is correct, press one. If this is not correct, press two."	**Validate Phone Number**
entertelno	"Please enter your area code and telephone number followed by the pound key."	**Validate phone number**
goodbye	"Goodbye, and thank you for calling."	**Validate phone number**, **Use Prompt to ask for customer ID**, Workgroup option **Allow customer to leave a voicemail**, and after input failure to Agent voicemail menus.
thankyou	"Thank you."	**Validate Phone Number** and **Ask for Customer ID**
verification	"If this is correct, press 1, if this is not correct, press 2."	**Ask for Customer ID**

Workgroup Option Prompts

CCA plays Workgroup Option Prompts (Table 5-7) for those callers that have entered or are waiting in a workgroup queue for the next available agent.

If a workgroup option is listed for a prompt, then CCA plays that prompt *only* if the indicated workgroup option is enabled in the AM Workgroups screen. (See “Creating a Workgroup” on page 7-3.)

Table 5-7. Workgroup Option Prompts (Part 1 of 3)

File Name (.wav)	Default	Workgroup Option
acdcallback	“Press two to enter your telephone number and receive a call back. Your priority status in the queue will be preserved”	See “Allow customer to request a callback” on page 7-15.
acdentercountrycode	“Please enter your country code followed by the pound key.”	Workgroup: Allow callers to request a callback. See “Allow customer to request a callback” on page 7-15.
acdentertelno	“Please enter your area code and telephone number followed by the pound key.”	Workgroup: Allow callers to request a callback. See “Allow customer to request a callback” on page 7-15.
acdgoodbye	“You will receive a call back as soon as a representative has become available. Please make sure your telephone line is free to receive the call. Thank you, and goodbye.”	“Allow customer to request a callback” on page 7-15.

Table 5-7. Workgroup Option Prompts (Part 2 of 3)

File Name (.wav)	Default	Workgroup Option
acdintro	"All Agents are currently busy with other callers. Please continue to hold to maintain your priority sequence. This call may be monitored for quality assurance purposes."	See **Intro** under the "Select Prompts for this workgroup" control on page 7-17 for information on replacing this prompt with a prompt from your Prompt Library.
acdmenu	"At any time while you are on hold, you may choose among the following options, or, continue to hold for the next available Agent."	See "Allow customer to request a callback" and "Allow customer to leave a voicemail" on page 7-16.
acdnewmenu	"for more options, press 3"	See "Route to Project Menu" on page 7-14.
acdrepeat	"Your call is very important to us. Please hold for the next available Agent. All calls are answered in the order in which they are received."	See **Hold** under the "Select Prompts for this workgroup" control on page 7-17 for information on replacing this prompt with a prompt from your Prompt Library.
acdrepeatmenu	"Press nine to repeat this menu."	Played if either of **Allow customer to request a callback** or **Allow customer to leave a Voice Mail** is checked (see page 7-15).
acdring	Two minutes and nineteen seconds of ringing (25 rings)	See **Ring** under the "Select Prompts for this workgroup" control on page 7-17 for information on replacing this prompt with a prompt from your Prompt Library.
acdvoicemail	"Press one to leave a voicemail message"	See "Allow customer to leave a voicemail" on page 7-16.

Table 5-7. Workgroup Option Prompts (Part 3 of 3)

File Name (.wav)	Default	Workgroup Option
acdwaitestimate	"Your estimated wait time is"	See "Play estimated wait time" on page 7-15.
acdwaitminute	"minute"	
acdwaitminutes	"minutes"	
countrycodeenter	"The country code you entered is "	Workgroup Option. See "Allow customer to request a callback" on page 7-15.
invalid	"Invalid entry"	
music	Fifty-six seconds of pre-recorded music.	See **Music** under the "Select Prompts for this workgroup" control on page 7-17 for information on replacing this prompt with a prompt from your Prompt Library.
numconfirm	"If this is correct, press one. To re-enter, press two. To cancel and continue to hold, press three."	See "Allow customer to request a callback" on page 7-15.
numenter	"The number you entered is"	See "Allow customer to request a callback" on page 7-15.
recordmenu	"To re-record your message, press one. To listen to your message, press two. To send your message, press three. To cancel and continue, press seven."	Workgroup option **Allow Customer to leave a Voicemail**.
recordmsg	"Please record your message at the tone. When you are finished, press the pound key."	Workgroup option **Allow Customer to leave a Voicemail**.

The Order of Workgroup Prompts

The order in which CCA plays workgroup prompts can be affected by these features:

- Allow customer to leave a voicemail
- Allow customer to request a callback

Both features and the process of selecting workgroup prompts, are described beginning on page 7-14.

Order of workgroup prompts when not using leave voicemail or request callback

If you are **not** using either of the above features and you are using the default system prompts, CCA plays workgroup prompts in the order shown in Table 5-8.

Table 5-8. Order of Workgroup Prompts When Not Using Voicemail or Request Callback

Prompt	Default File
Intro Prompt	acdintro
Music Prompt	music
Hold Prompt	acdrepeat

After CCA plays the hold prompt, the customer hears a music prompt/hold prompt loop until an agent becomes available or until the customer hangs up.

Order of workgroup prompts when using leave voicemail or request callback

If you **are** using either of the above features, CCA plays workgroup prompts play in the order shown in Table 5-9.

Table 5-9. Order of Workgroup Prompts When Using Voicemail or Request Callback

Prompt	Default File
Intro Prompt	acdintro
Music Prompt	music
ACD Menu Prompt	acdmenu

Table 5-9. Order of Workgroup Prompts When Using Voicemail or Request Callback

Prompt	Default File
ACD Voicemail Prompt (If you enabled “Allow customer to leave a voicemail”)	acdvoicemail
ACD Callback Prompt (If you enabled “Allow customer to request a callback”)	acdcallback
ACD Repeat Menu	acdrepeatmenu
Music Prompt	music
Hold Prompt	acdrepeat

After playing the Hold prompt, CCA loops (starting with the music) until an agent becomes available or until the customer hangs up.

Call Blocking Prompts

CCA plays the Call Blocking prompts (Table 5-10) when a customer or agent attempts to enter a number that matches a number pattern labeled as blocked. (See “Creating a Call Blocking List” on page 14-2.)

For example, if a customer requesting a callback enters a blocked number, CCA plays a prompt notifying them that the callback cannot be completed.

or

If an agent attempts to transfer a call to a number identified as blocked, CCA plays a prompt to notify them that the transfer cannot be completed.

Table 5-10. Call Blocking Prompts

File Name (.wav)	Default Recording	Default Application
countryblocked	“We’re sorry, the country code you entered cannot be dialed from our system.”	Call blocking

Table 5-10. Call Blocking Prompts

File Name (.wav)	Default Recording	Default Application
numberblocked	“We’re sorry, the number you entered cannot be dialed from our system.”	Call blocking

All Prompts by File Name

Table 5-11 lists all supplied CCA prompts, sorted by file name.

Table 5-11 CCA System Prompts Sorted by File Name (Part 1 of 9)

File Name (.wav)	Default Recording	Default Application
0 - 99	“oh” through “ninety-nine”	Project option **Ask for customer ID**, workgroup option **Play Estimated Wait Time**, **Validate Phone Number**, and Company Directory Navigation
_welcome	“Hello, and thank you for calling.”	Project options **Ask for customer ID** and **Validate Phone Number**
acdcallback	“Press two to enter your telephone number and receive a call back. Your priority status in the queue will be preserved”	Workgroup: **Allow customer to request a callback** option
acdentercountrycode	“Please enter your country code followed by the pound key.”	Workgroup: Allow callers to request a callback. See “Allow customer to request a callback” on page 7-15.
acdentertelno	“Please enter your area code and telephone number followed by the pound key.”	Workgroup: Allow callers to request a callback. See “Allow customer to request a callback” on page 7-15.

Table 5-11 CCA System Prompts Sorted by File Name (Part 2 of 9)

File Name (.wav)	Default Recording	Default Application
acdgoodbye	"You will receive a call back as soon as a representative has become available. Please make sure your telephone line is free to receive the call. Thank you, and goodbye."	Workgroup: **Allow customer to request a callback** option
acdintro	"All Agents are currently busy with other callers. Please continue to hold to maintain your priority sequence. This call may be monitored for quality assurance purposes."	Workgroup option: See **Intro** under the "Select Prompts for this workgroup" control on page 7-17 for information on replacing this prompt with a prompt from your Prompt Library.
acdmenu	"At any time while you are on hold, you may choose among the following options, or, continue to hold for the next available Agent."	Workgroup options **Allow customer to leave a voicemail**, **Allow customer to request a callback**, and **Allow customer to leave a voicemail.**
acdrepeat	"Your call is very important to us. Please hold for the next available Agent. All calls are answered in the order in which they are received."	Workgroup option: **Hold** prompt.
acdrepeatmenu	"Press nine to repeat this menu."	Workgroup options **Allow customer to request a callback** or **Allow customer to leave a Voice Mail** (see page 7-15).
acdring	Two minutes and nineteen seconds of ringing (25 rings)	Workgroup option: See **Ring** under the "Select Prompts for this workgroup" control on page 7-17 for information on replacing this prompt with a prompt from your Prompt Library.
acdvoicemail	"Press one to leave a voicemail message."	Workgroup: **Allow customer to leave a voicemail** option
acdwaitestimate	"Your estimated wait time is "	Workgroup option **Play Estimated Wait Time**

Table 5-11 CCA System Prompts Sorted by File Name (Part 3 of 9)

File Name (.wav)	Default Recording	Default Application
acdwaitminute	"Minute."	Workgroup option **Play Estimated Wait Time**
acdwaitminutes	"Minutes."	Workgroup option **Play Estimated Wait Time**
am	"a.m."	Date/Time
anotherlocation	"To try to reach this person at another location, press one. To send this person a voicemail message, press two." See "Enable Follow Me" on page 10-12.	Project Option **Follow Me** (played for *Customer* if agent does not answer primary extension and **Follow Me** is enabled)
april	"April"	Date/Time
at	"at"	Agent voicemail retrieval
august	"August"	Date/Time
badext	"Invalid extension"	Played for customers who dial an extension that has not been assigned.
busytone	Eight seconds of busy tone (eight tones)	Played for agents to indicate a busy line. **Note**: You cannot modify or delete this prompt using the Administration Manager.
clientnumconfirm	"If this is correct, press one. If this is not correct, press two."	Project option **Validate Phone Number**
confminutes	"Using your touchtone telephone keypad, please enter a number between 1 and 300 to indicate the number of minutes you wish to extend this conference."	Played to the agent who scheduled the conference.
confextend	"The conference will be ending soon. To extend this conference, press 1. To rejoin the conference without extending the time, press pound (#)."	Played to conference participants.
countryblocked	"We're sorry, the country code you entered cannot be dialed from our system."	Call blocking

Table 5-11 CCA System Prompts Sorted by File Name (Part 4 of 9)

File Name (.wav)	Default Recording	Default Application
countrycodeenter	"The country code you entered is "	Workgroup option. See "Allow customer to request a callback" on page 7-15
customeridentered	"The customer id number you entered is"	Project option **Ask for customer ID**
customeridnum	"Please enter your customer id number followed by the pound key"	Project option **Ask for customer ID**
day01 - day31	"First" through "Thirty-first"	Date/Time
december	"December"	Date/Time
devicenotdefined	"This MSI station id is not available. Please select another MSI station id or contact your network administrator."	Played upon picking up an MSI agent extension that has not been configured. **Note**: You cannot modify or delete this prompt using the Administration Manager.
entermailbox	"Please enter your mailbox number, followed by the pound key."	Agent voicemail retrieval
entername	"Please enter the last name of the person you wish to reach using your touch-tone telephone keypad. For the letter "Q", use the number seven. For the letter "Z", use the number nine."	Company Directory Navigation
enterpassword	"Please enter your password, followed by the pound key."	Agent voicemail retrieval
entertelno	"Please enter your area code and telephone number followed by the pound key."	Project option **Validate Phone Number**
errmsg	"If you would like to make a call, please hang up and try again. If you need help, hang up and then dial your operator."	Call Center prompt. Played for agent if phone is left off hook and no keys are pressed.
extnumber	"Extension number."	Company Directory Navigation
february	"February"	Date/Time
goodafternoon	"Good Afternoon."	Agent voicemail retrieval

Table 5-11 CCA System Prompts Sorted by File Name (Part 5 of 9)

File Name (.wav)	Default Recording	Default Application
goodbye	“Goodbye, and thank you for calling.”	**Validate phone number**, **Use Prompt to ask for customer ID**, Workgroup option **Allow customer to leave a voicemail**, and after input failure to Agent voicemail menus.
goodevening	“Good Evening”	Agent voicemail retrieval
goodmorning	“Good Morning”	Agent voicemail retrieval
heardnewmsg	“You have heard all of your new messages.”	Agent voicemail retrieval
heardsavedmsg	“You have heard all of your saved messages.”	Agent voicemail retrieval
hundred	“hundred”	Agent voicemail retrieval, workgroup option **Estimated Wait Time**
invalid	“Invalid entry”	Invalid Menu Entry
invalidext	“Invalid extension, please hang up and try your call again”	Played for agents who dial an invalid extension when attempting to call another agent.
invalidmp	“The password you entered does not match the mailbox you selected”	Agent voicemail retrieval
january	“January”	Date/Time
july	“July”	Date/Time
june	“June”	Date/Time
licensesnotavailable	“The number you have dialed is temporarily unavailable due to excessive traffic. Please try your call again later.”	Played for callers who reach the call center while the maximum Interactions licensing limit has been met. **Note**: You cannot modify or delete this prompt using the Administration Manager.
listennewarcvm	“Press 1 to listen to your new voicemail messages, press 2 to listen to your saved voicemail messages, press star to return to the main menu”	Agent voicemail retrieval

Table 5-11 CCA System Prompts Sorted by File Name (Part 6 of 9)

File Name (.wav)	Default Recording	Default Application
mailboxmainmenu	"Press 1 to retrieve your voicemail messages, faxes and emails, press 2 to record or rerecord your voicemail greeting, press 9 to repeat these choices"	Agent voicemail retrieval
mailserverdown	"The system is unable to connect you to the mail server, you may continue into the system and do anything you would ordinarily do except receive voicemail messages."	Agent voicemail retrieval
march	"March"	Date/Time
may	"May"	Date/Time
msgdeleted	"Message deleted"	Agent voicemail Retrieval
msgreceived	"Message received on"	Agent voicemail Retrieval
msgsaved	"Message saved"	Agent voicemail Retrieval
msgsent	"Message sent"	Agent voicemail Retrieval
music	hold music (56 seconds of light jazz)	Workgroup Option: See **Music** under the "Select Prompts for this workgroup" control on page 7-17 for information on replacing this prompt with a prompt from your Prompt Library.
newmessage	"New message"	Agent voicemail retrieval
newmessages	"New messages"	Agent voicemail retrieval
nomessages	"You have no messages in your mail box"	Agent voicemail retrieval
nonewmessages	"You have no new messages"	Agent voicemail retrieval
nopeople	"There are no names that match your selection"	Company Directory Navigation
nosavedmessages	"You have no saved messages"	Agent Voicemail retrieval
november	"November"	Date/Time
numberblocked	"We're sorry, the number you entered cannot be dialed from our system."	Call Blocking

Table 5-11 CCA System Prompts Sorted by File Name (Part 7 of 9)

File Name (.wav)	Default Recording	Default Application
numconfirm	"If this is correct, press one. To re-enter, press two. To cancel and continue to hold, press three."	Workgroup Option (see "Allow customer to request a callback" on page 7-15).
numenter	"The number you entered is "	Workgroup Option. See "Allow customer to request a callback" on page 7-15
october	"October"	Date/Time
pleasehold	"Please hold while we connect you to the Mail Server."	Agent voicemail retrieval
pm	"p.m."	Date/Time
recordmenu	"To re-record your message, press one. To listen to your message, press two. To send your message, press three. To cancel and continue, press seven."	Workgroup option **Allow Customer to leave a Voicemail**
recordmsg	"Please record your message at the tone. When you are finished, press the pound key."	Workgroup option **Allow Customer to leave a Voicemail**
remoteagent	"This call has been forwarded from the call center. To accept this call, press one." See "Play announcement to agent" on page 6-15 for information on when this prompt is played for Agents.	Agent option **Play announcement to agent**.
replymailmenu	"To repeat this message, press two. To save this message, press three. To delete this message, press four. To return to the main menu, press star. To repeat these choices, press nine."	Agent voicemail retrieval
ring	Two minutes and nineteen seconds of ringing (25 rings)	Played for direct-dialed calls to an extension. **Note**: You cannot modify or delete this prompt using the Administration Manager.
savedmessage	"Saved message."	Agent voicemail retrieval
savedmessages	"Saved messages."	Agent voicemail retrieval

Table 5-11 CCA System Prompts Sorted by File Name (Part 8 of 9)

File Name (.wav)	Default Recording	Default Application
select	"Press any key when you hear the name of the person you wish to reach."	Company Directory Navigation
selectdir	"People matching your selection."	Company Directory Navigation
selectgreeting	"To listen to your busy message press one, to record or rerecord your busy message press 2, to listen to your recorded name press 7, to record or rerecord your recorded name press 8, To repeat these choices press 9, to return to the main menu press star"	Agent voicemail setup
september	"September"	Date/Time
servicenotavailable	"The number you have dialed is temporarily unavailable. Please check the number and try your call again later."	Played for callers reaching a phone number for which no CCA Project has been configured. **Note**: You cannot modify or delete this prompt using the Administration Manager.
silence	One second of silence.	Played if no prompt exists for a menu. **Note**: You cannot modify or delete this prompt using the Administration Manager.
thankyou	"Thank you."	Project Options **Validate Phone Number** and **Ask for Customer ID**, and Workgroup Option **Allow customer to request a callback**
thereare	"There are "	Company Directory Navigation
thousand	"Thousand"	Agent Voicemail Retrieval, Workgroup Option **Estimated Wait Time**

Table 5-11 CCA System Prompts Sorted by File Name (Part 9 of 9)

File Name (.wav)	Default Recording	Default Application
tone	(21 seconds of high-pitched dial tone)	Played for agent after pressing ‘9’ for an outside line. **Note**: You cannot modify or delete this prompt using the Administration Manager.
tone2	(21 seconds of low-pitched dial tone)	Played for agent prior to dialing. **Note**: You cannot modify or delete this prompt using the Administration Manager.
transferto	“Please hold while I transfer you to “	Company Directory Navigation
unknowndate	“The system is not able to retrieve the date and time of this message.”	Agent voicemail retrieval
verification	“If this is correct, press 1, if this is not correct, press 2.”	Project option **Ask for Customer ID**
youHave	“You have”	Agent voicemail retrieval

Creating Administrator, Agent, and Supervisor Accounts

Create accounts for three main types of users:

- **Agents** use the Interaction Manager program to handle interactions that enter the call center.
- **Supervisors** monitor agent activities using the Supervision Manager program, but can also log into the Interaction Manager to handle interactions. (Supervisors can have full or limited access to CCA and a Guest Supervisor has limited capabilities.)
- **Administrators** can log into Interaction Manager and Supervision Manager, but mainly use the Administration Manager program to create and configure companies and accounts.

Refer to Table 6-1 for a complete description of user roles and the capabilities of each role.

Table 6-1. User Permissions

User Role	Capabilities
Agents can:	• Login to Interaction Manager. • Accept interactions. • Create contacts. • Transfer customers and participate in conferences. • Use chat features. • Manage tasks. • Participate in predictive calling.

Table 6-1. User Permissions

User Role	Capabilities
Supervisors can:	• Login to Interaction Manager or Supervisor Manager. • Access all agent features. • Supervise agents (Listen, Coach, Join, Hang up, Logout, Broadcast, Chat, and Record). • Set alarms. • Monitor agent statistics, workgroups, and interactions. • Review recordings. • Run any reports Administrators create. • Control and monitor predictive dialing. **Note**: Create Supervisors with both “full” and “limited” permissions. (See “Supervisor Permissions” on page 6-11.
Guest Supervisors can:	• Login to Supervision Manager. • Set alarms. • Listen to and monitor the status of agents that have been assigned to them.
Administrators can:	• Login to Administration Manager, Supervision Manager, and Interaction Manager. • Edit the data, settings, and configurations in their company, which the System Administrator gave them. • Create agents, supervisors, and Guest Supervisors. • Create reports.
System Administrators can:	• Login to Administration Manager. • Access all features available to administrators. • Edit most of the data, settings, and configurations in their company. • Restrict access of Administrators to program features.
Network Administrators can (Service Provider only):	• Login to Administration Manager. • Access all features available to System Administrators. • Create new companies. • Edit all of the data, settings, and configurations in any company. • Create Agents, Supervisors, Guest Supervisors, Administrators, System Administrators, and Network Administrators. **Note**: This account is only available in the Service Provider Edition in the ***ASP Services*** Company.

When creating user accounts, keep the following in mind:

- A **Network Administrator** account can create any account type.
- A **System Administrator** account can create Administrator accounts and below.
- An **Administrator** account can create Supervisor accounts and below.
- A **Supervisor** account can create Agent accounts.
- **Agent** accounts cannot create any accounts.

If you login with a Network Administrator account and create a System Administrator or another Network Administrator, you CANNOT change the access permissions for these accounts later.

> For example, after creating a System Administrator account, you decide to change access permissions to only a Supervisor level. The only way to do this is to delete the System Administrator account and create a new Supervisor account from scratch.

If you login as a Network Administrator or a System Administrator and create an Administrator, Supervisor, Guest Supervisor, or Agent account, you can change the access permissions for these accounts at any time.

> For example, after creating an Agent account, you decide to change access permissions to a Supervisor or Administrator. You can do so at any time.

Creating User Accounts

Before creating accounts for agents and supervisors, you must create **Agent Skills** for your call center. See “Creating an Agent Skills Library” on page 4-2.

To create user accounts

1. Click **Options** > **Agents** > **Add** button. The Add Agents Screen (Figure 6-1) opens to the Profile tab.

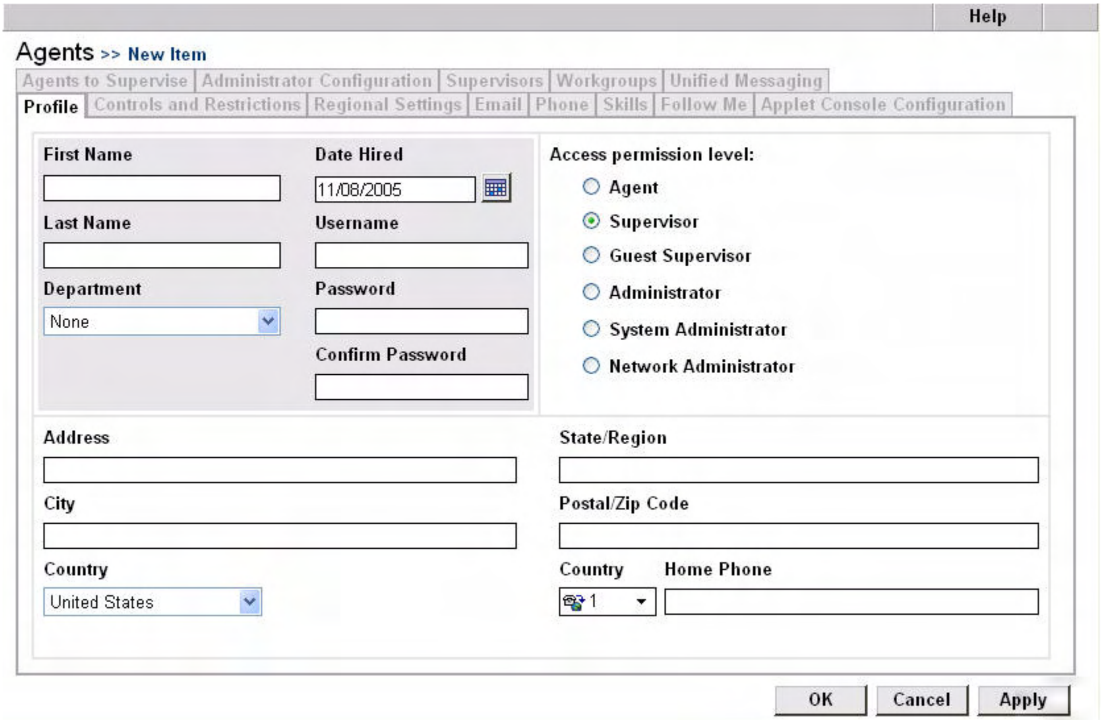


Figure 6-1 Agents Screen: Profile Tab

2. Use the information in Table 6-2 to complete the Agent - Profile fields.

Table 6-2. Agent - Profile Tab Fields and Descriptions

Field	Description
First Name	Type the agent’s first name.
Last Name	The the agent’s last name.
Department	Select the department where this agent works.
Address Fields	Type contact information for the agent into the address fields.
Date Hired	Type the date that this agent was hired to work in the call center. or Click the icon to open a calendar, from which you can choose the agent’s hire date.
Username	Type the username the agent will use to log in to AM. **Note**: For an agent to retrieve voicemail messages from a remote telephone (or to set up voicemail greetings), the agent’s username must contain only digits (no letters).
Password	Type a password for the user. **Notes**: • For an agent or supervisor to retrieve voicemail messages from a remote telephone (or to set up voicemail greetings), the password must be digits only (no letters). • If you are using LDAP authentication, the “Password” and “Confirm Password” fields are disabled. (See page 3-43 for more information on CCA support for LDAP.) When you create a new user (agent, supervisor, and so on) and you are using LDAP, AM sets the user’s TAW password to be the same as their username. This “default” password is never used, as long as you continue to use LDAP. But, if you decide to stop using LDAP and go back to the TAW Security Policy, your users will still be able to login by entering their username as their password. TAW designed this default password mechanism to make it easier to transition back to the TAW Security Policy after using LDAP.

3. Click the **Controls and Restrictions** tab to access the options in the Controls and Restrictions screen (Figure 6-2).

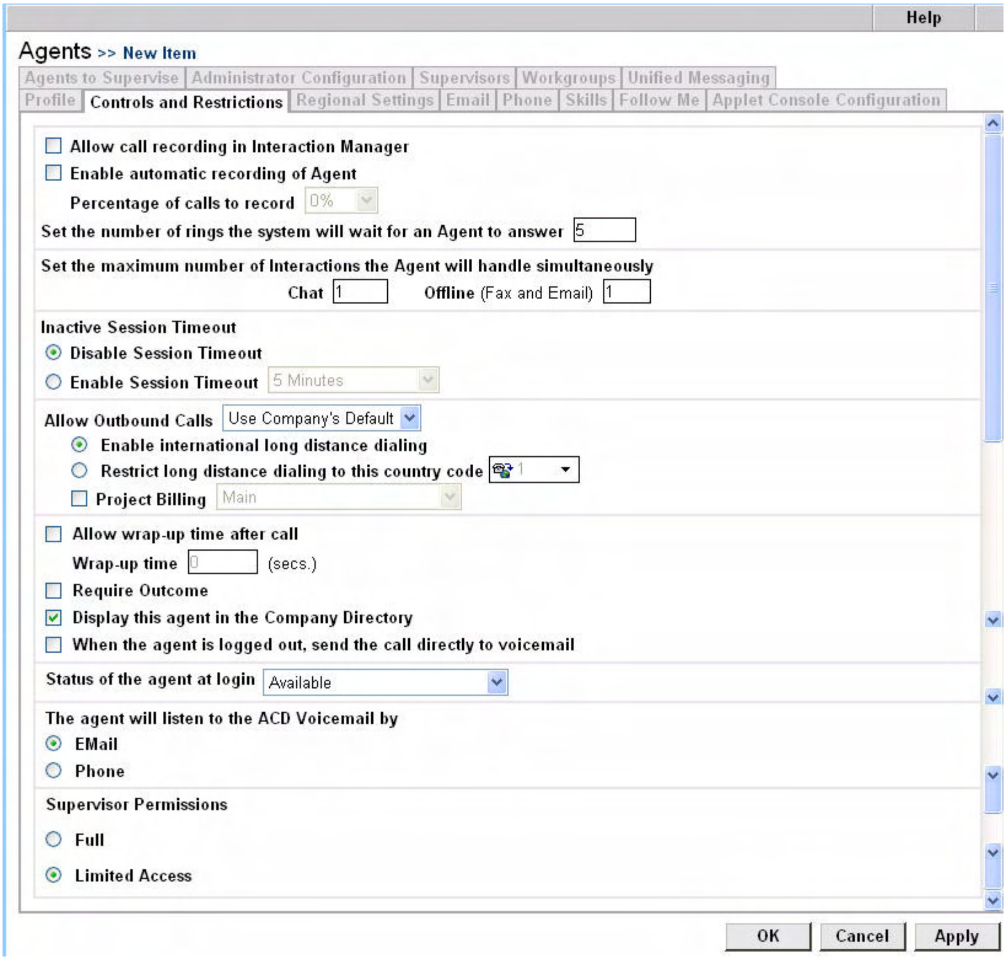


Figure 6-2 Agents Screen: Controls and Restrictions Tab

4. Use the information in Table 6-3 to complete the Agent Controls and Restrictions screen.

Table 6-3. Agent Controls and Restrictions Fields and Descriptions

Field	Description
Allow call recording In Interaction Manager	Check this box so that the agent can record conversations with callers when logged into IM. **Note**: Make sure call recording is allowed by law in the Agent's location.
Enable automatic recording of Agent	Check this box to record this agent at random times for quality monitoring. **Note**: Agent to agent calls (internal extension) are not recorded using this feature. However, all other call types (ACD and direct external number) are recorded.
Percentage of calls to record	Select the percentage of interactions to record automatically when the agent is logged into IM. For example, if you select **20**, then CCA records two of every ten Interactions the agent receives. **Note:** Each time you change this value, CCA resets special counters it uses for "number of calls received by the Agent" and "number of calls recorded for the Agent."
Set the number of rings the system will wait for an Agent to answer	Type the approximate number of times to ring the agent's extension before setting the agent's status to **No Answer** and placing the workgroup call back into the queue. **Note**: The agent and customer may not hear the exact number of rings you specify. CCA plays `ring.wav` for ((***n*** * 4)+6) seconds where ***n*** is the value specified.

Table 6-3. Agent Controls and Restrictions Fields and Descriptions

Field	Description
Set the Maximum Number of Interactions the Agent will Handle Simultaneously	**Chat**: Type the maximum number of simultaneous chat Interactions that the system can route to the agent while they are logged into IM. **Offline**: Type the maximum number of simultaneous offline (fax and email) interactions CCA can route to the agent while the agent is logged into IM. When an agent accepts an interaction, their status automatically changes to **Busy**. If you set the Max Number of Simultaneous Interactions to at least **2**, the agent can click the **Available** button and accept another interaction. When the agent reaches the limit you set here, the agent cannot accept any more interactions, even if the agent clicks the **Available** button. **Note**: This field **only** affects chat and offline (fax and email) interactions. No matter what you set here, agents can always accept an unlimited number of phone interactions. Also see "Managing Mail Interactions (Email and Voicemail)" on page 13-1.

Table 6-3. Agent Controls and Restrictions Fields and Descriptions

Field	Description
Inactive Session Timeout	Use the Inactive Session Timeout to automatically log out an agent or supervisor after a period of inactivity. • Use the Inactive Session Timeout in the Controls and Restrictions tab to set an inactivity timeout for an individual account. • There is also an Inactive Session Timeout that you can apply to the entire company. (Options > Company > Profile tab > Inactive Session Timeout). See page 3-10. **Disable Session Timeout**: CCA will never automatically log out the account. **Enable Session Timeout**: Select a timeout value between 5 minutes and 24 hours.
Allow Outbound Calls	**Use Company's Default**: Check so that the agent can make outbound calls as defined in Options > Company > Company Configuration > Allow Outbound Calls list box. **Disable**: Check so that the agent can never make outbound calls.
Enable international long distance dialing	Choose so that the agent can make long distance calls to any country code from their workstation.
Restrict long distance dialing to this country code	Choose so that the agent can make long distance calls only to the specified country code.
Project Billing	Select the project to use as the default billing project for this agent in IM.
Allow wrap up time after calls	Check so that the agent has time to wrap up a concluded phone Interaction (ACD call, callback, and Web callback). After the Wrap up Time expires, the system changes the agent's status to **Available** and routes interactions to the agent **Note**: Wrap up does not apply to direct inbound or direct outbound calls. As soon as an agent disconnects from a direct inbound or outbound call, CCA changes the agent's status immediately to **Available**.

Table 6-3. Agent Controls and Restrictions Fields and Descriptions

Field	Description
Wrap-up time	Type the number of seconds the agent has to wrap-up a concluded phone interaction.
Require outcome	Check so that the agent can view the Outcome Library at the conclusion of interactions. (Requiring agents to record an outcome after each interaction helps track the results of interactions.) **Notes**: To enable outcomes, you must: • Check this check box for the agent. • Create one or more outcomes (Libraries > Outcomes). • Add required outcomes to your project (Options > Projects > Outcomes tab). In addition, you **must** enable outcomes so that agents can reschedule a Web callback or ACD callback interaction. **Note**: Outcomes are **required** for each agent handling Predictive Projects.
Display this Agent in the Company Directory	Check to add the agent to the Company Directory.
When the Agent is logged out, send the call directly to voicemail	Check to have CCA immediately send all calls routed to the **logged out** agent to voicemail.
Status of the Agent at Login	From the drop-down menu, select a predefined system status (Available, Busy, Last Call, or On Break) to assign the agent when the agent first logs into CCA. After login, the agent's state can change as usual (either manually by the agent or by the system). **Note**: You cannot select a custom status.

Table 6-3. Agent Controls and Restrictions Fields and Descriptions

Field	Description
The agent will listen to the ACD Voicemail by:	Select how the agent uses their email or their phones to access an ACD voicemail. Select **Email** so that the agent can access ACD voicemails by: 1. Accepting the voicemail as an interaction. 2. The system starts the agent's email client. The voicemail appears as an email attachment. 3. The agent opens the sound file attachment and listens. Select **Phone** so that the agent can access ACD voicemails by: 1. Accepting the voicemail as an interaction. 2. The call center will ring the Agent's phone and give the Agent several options, one of which will be to listen to the voicemail.
Supervisor Permissions	If you are creating or editing a supervisor account, give the supervisor either **limited** or **full** permissions. **Limited** access allows the supervisor to access information related to their assigned agents in SM. **Full** access allows the supervisor to access information for all agents, workgroups, and interactions for the entire company. The access level you give to a supervisor affects several screens in SM. (Refer to “Types of Supervisor Accounts” in the Supervision Manager manual for more details.)

5. Click the **Regional Settings** tab to open the Regional Settings screen (Figure 6-3).

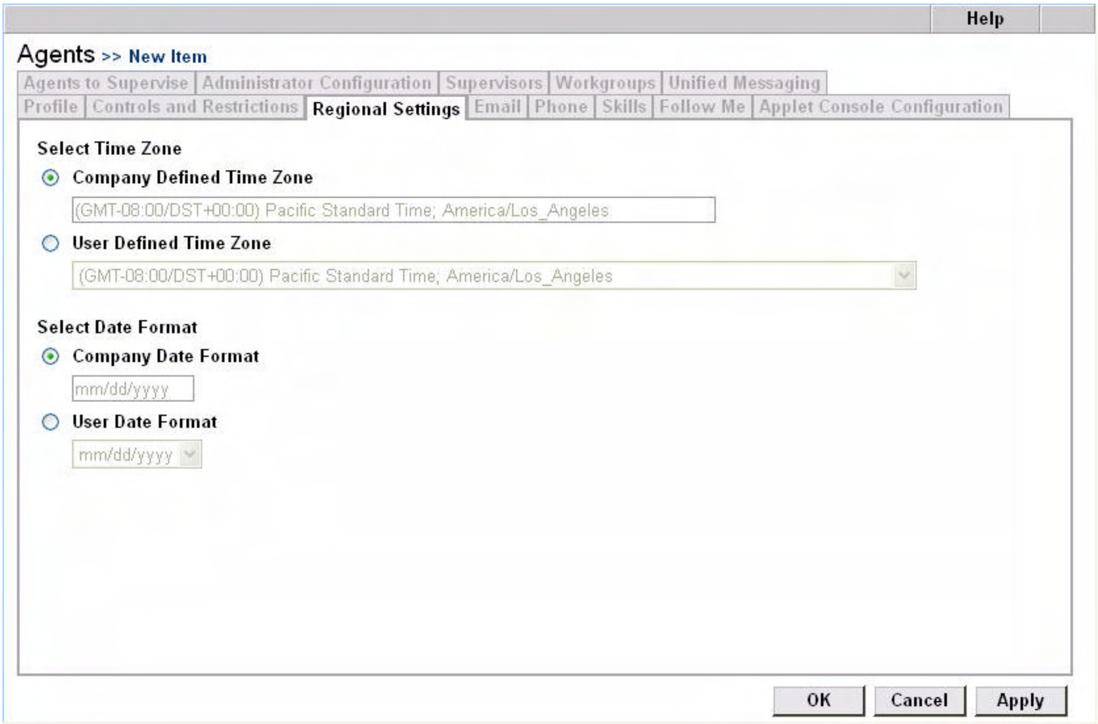


Figure 6-3 Agents Screen: Regional Settings Tab

6. Use the information in Table 6-4 to complete the Agent Regional Settings.

Table 6-4. Agent Regional Settings Fields and Descriptions

Field	Description
Select Time Zone	Choose the time zone in which this agent works. If the agent configures their IM to “User Defined Time Zone” (instead of the Company time zone; see “Configuring Company Time Zone and Date Format” on page 3-19), the time zone you choose here becomes the agent’s default time zone. However the agent can override your selection at their workstation.
Select Date Format	Click the date format for area in which this agent works. The date format you choose here becomes the agent’s default date format. However the agent can override your selection at their workstation to use a date format of their choice.

7. Click the **Email** tab to access the Email screen (Figure 6-4).

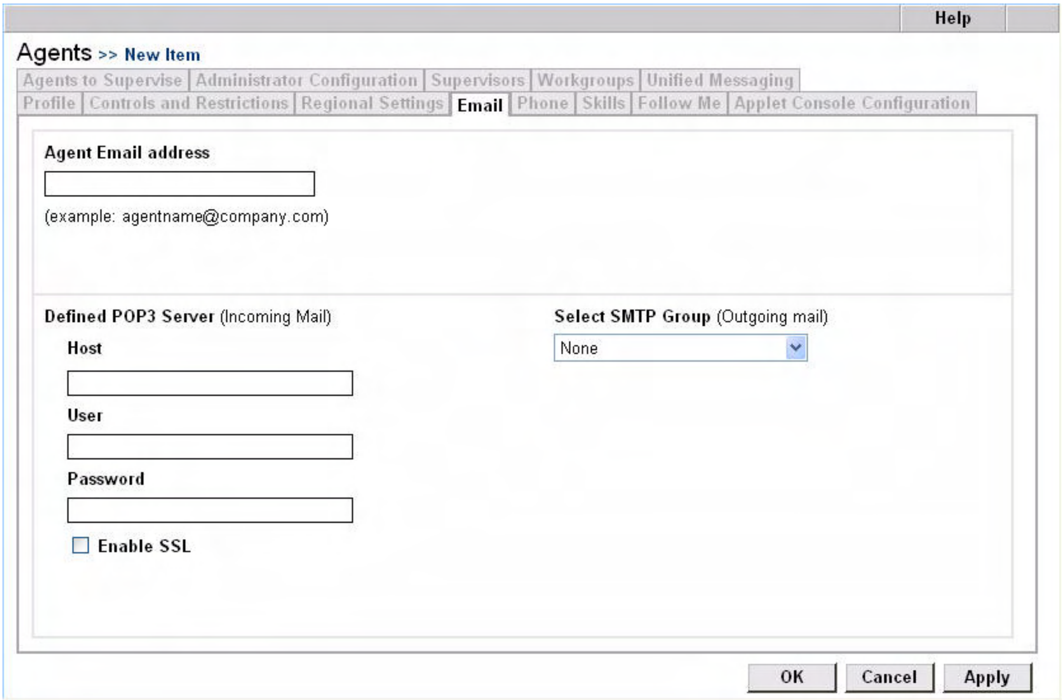


Figure 6-4 Agents Screen: Email Tab

8. Use the information in Table 6-5 to complete the agent's email information.

Table 6-5. Email Fields and Descriptions

Field	Description
Agent Email Address	Type the full email address for CCA to use to route email interactions to the agent.
Host	Type the name of the computer hosting the POP3 Server this agent uses.
User	Type the username for the agent to use when accessing the POP Server.
Password	Type the password for the agent to use when accessing the POP Server.

Table 6-5. Email Fields and Descriptions

Field	Description
Enable SSL	Check to add secure POP3 and SMTP connections to Mail Servers. **Note**: This is supported for Win32 and Solairs applications only.
Select SMTP Group	From the drop-down menu, select the SMTP Server Group for CCA to use when handling mail sent by this agent.

9. Click the **Phone** tab to access the Phone screen (Figure 6-5).

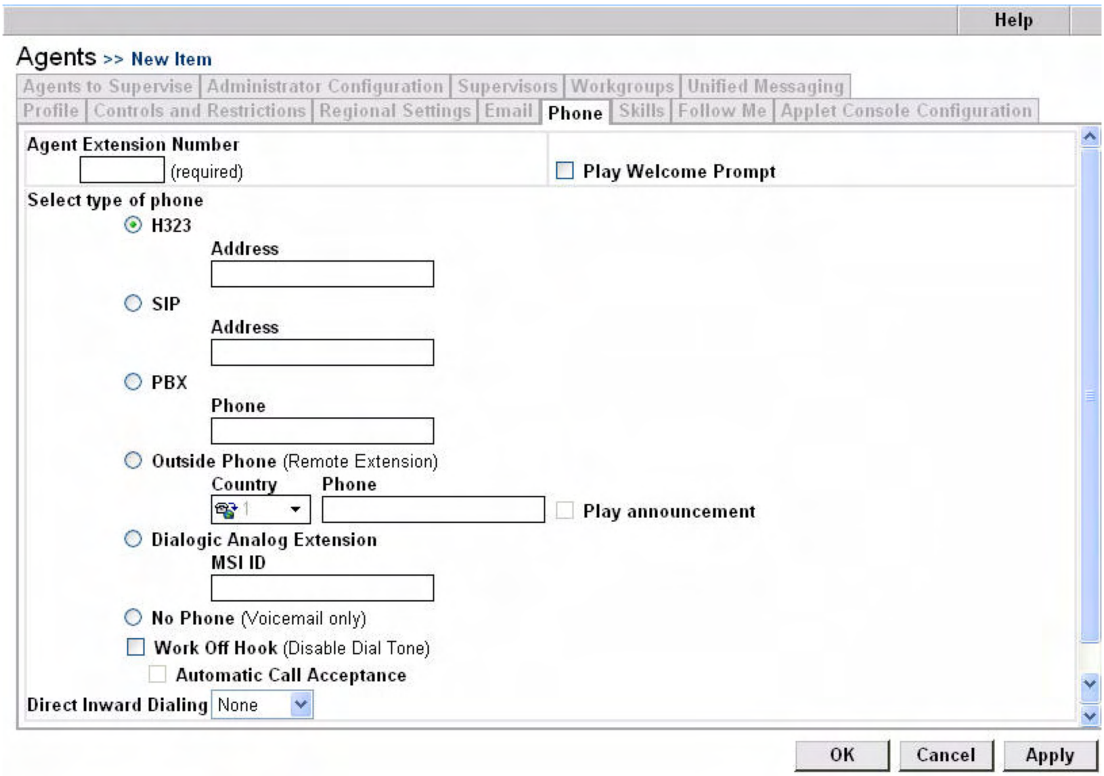


Figure 6-5 Agents Screen: Phone Tab

10. Using the information in Table 6-6, supply an extension number and phone type for the agent.

Table 6-6. Phone Screen Extension Types and Descriptions

Extension Type	Description
Agent Extension Number	This is a required field. Type the extension number for the agent. If you do not know the agent's extension number, contact the Administrator or the provisioning department at the customer site.
H323	Select if the agent uses a H323 system and type the IP address in **Address** box.
SIP	Select if the agent uses a SIP system and type the IP address in **Address** box
PBX	Select if the agent is a member of a Public Branch Exchange system and type the agent's PBX extension number in the **Phone** box.
Outside phone	Select if the agent works remotely. From the drop-down menu, select the agent's country code and then type the telephone number in the **Phone** box.
Play announcement to agent	Check to play the prompt **remoteagent.wav**, which alerts the remote agent that the call is a CCA call, and gives the agent the opportunity to accept or reject the call.
Dialogic Analog Extension	Select if the agent is a member of a MSI system and type their MSI ID number in the **MSI ID** box.
No Phone	Select to send all calls directly to the agent's voicemail.
Work Off Hook	Users may select to have their MSI extensions set to work Off Hook. There is no dial tone and beeps play when a call is incoming. With Off Hook, users can also have ACD calls auto-accepted without having to answer their headset per call.
Automatic Call Acceptance	If you select Work Off Hook, select Automatic all Acceptance so that the ACD all interaction is automatically accepted by the agent.

Table 6-6. Phone Screen Extension Types and Descriptions

Extension Type	Description
Direct Inward Dialing	From the drop-down menu, select a company DNIS number. CCA automatically routes customers who call this number to this agent. The agent's name appears in the Company > DNIS tab > Agent's Direct Inward Dialing Number, identifying that the DNIS is assigned to the agent. **Note**: For calls that are routed directly to an agent to appear in reports (such as Direct Dialing Statistics and Project Key Statistics), you must select a **Billing Project** for the agent (Options > Agents > Controls and Restrictions > Project Billing check box). **Note**: If this box is empty, it means the DNIS library option is disabled. (To enable it, go to **Options** > **Company** > **Options** tab > and check the **DNIS Library** check box.)

11. Click the **Skills** tab to access the Skills screen (Figure 6-6).

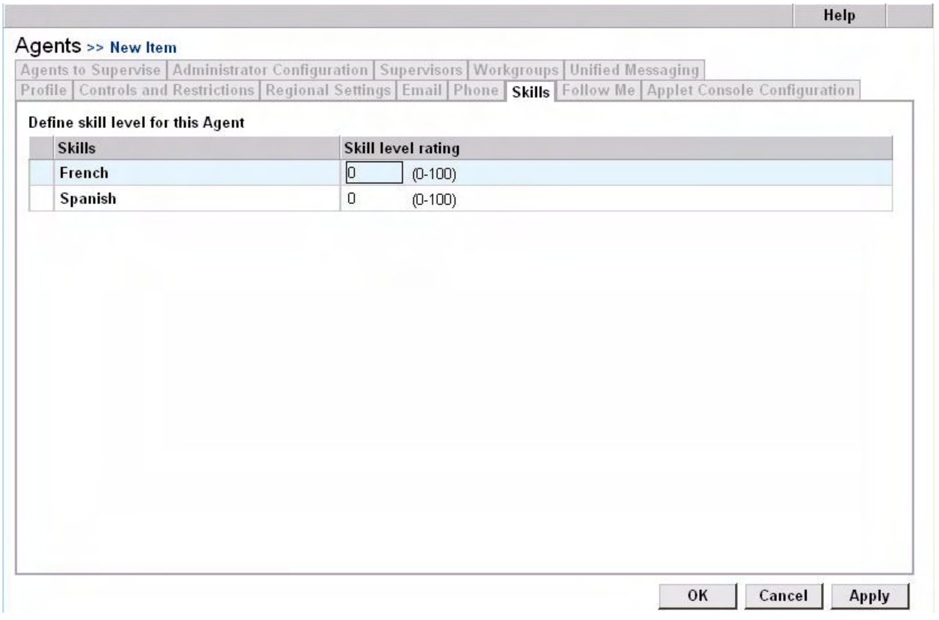


Figure 6-6 Agents Screen: Skills Tab

Agent skills are the abilities that agents possess that allow them to handle interactions coming into the call center. CCA matches the needs of the caller with the skills of all available agents and then routes the interaction to the agent most qualified to handle the interaction.

For example, if your call center agents handle callers who speak Spanish and French in addition to English, you might create two agent skills (“Speaks French” and “Speaks Spanish”). When a caller identifies themselves as a Spanish-speaker, CCA routes the caller to the available agent with the highest score for the “Speaks Spanish” skill.

12. Enter a rating between **1** and **100** for each skill in the Skill level rating column.

    The greater the rating you assign to the skill, the more you increase the likelihood that CCA routes interactions requiring this skill to this agent.

13. Click the **Follow Me** tab to access the Follow Me screen (Figure 6-7).

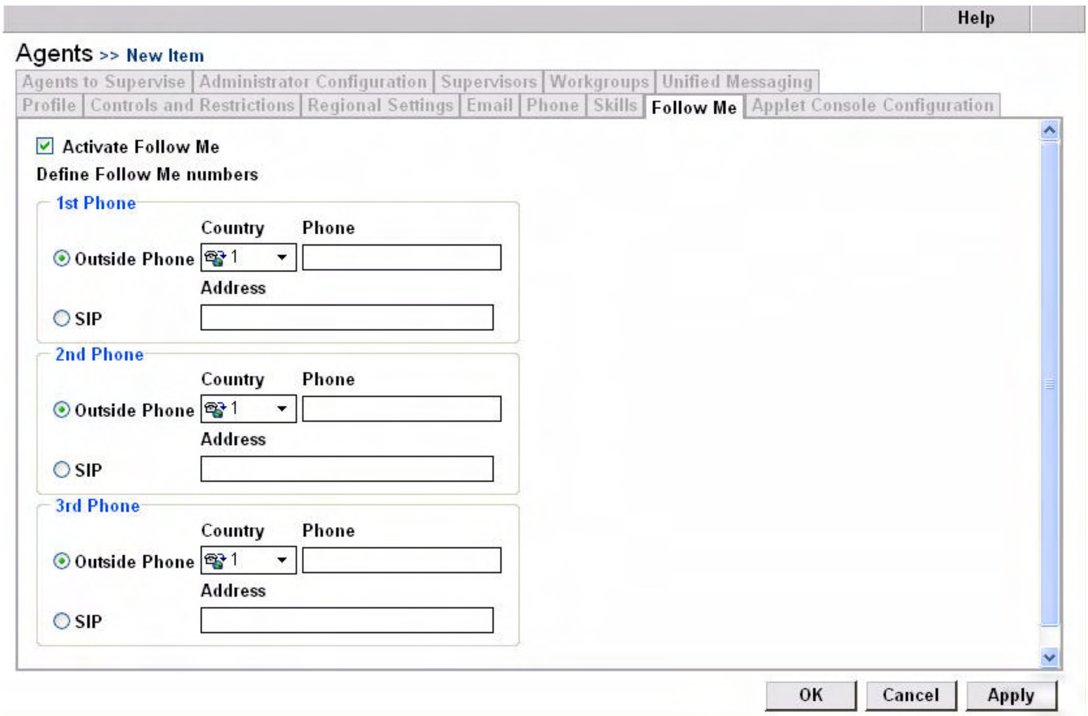


Figure 6-7 Agents Screen: Follow Me Tab

14. Click **Activate Follow Me** and use the information in Table 6-7 to complete the Follow Me options screen.

Table 6-7. Follow Me Fields and Descriptions

Field	Description
Activate Follow Me	When Follow Me is enabled, CCA forwards direct inbound calls (call made directly to an agent) to the Follow Me phone numbers or IP addresses (if the agent does not answer their primary extension). The Follow Me feature does <u>not</u> forward ACD calls (calls routed to an agent through a workgroup). CCA places these calls back into the queue for handling by the next available agent. **Note**: The Follow Me option must be enabled for both the agent and the agent's project for call forwarding to occur. (For information on enabling the Follow Me option for a Phone Project, see "Enable Follow Me" on page 10-12.)
Define follow me numbers	**Outside Phone**: Select a country code from the list box, and enter the number that the system should forward the call to if the Agent does not answer their extension. **SIP**: Enter the IP address that the call should be forwarded to.

15. Click **OK**.

16. If you are logged in as a Network Administrator, then click the **Applet Console Configuration** tab to access the Applet Console Configuration screen (Figure 6-8).

You must login as a Network Administrator to access the Applet Console Configuration tab.

This tab contains settings for advanced troubleshooting. You can establish these settings at the company level (**Options** > **Company** > **Applet Console Configuration**) or for individual agents (**Options** > **Agents** > **Applet Console Configuration**), if you are logged in using a Network Administrator account.

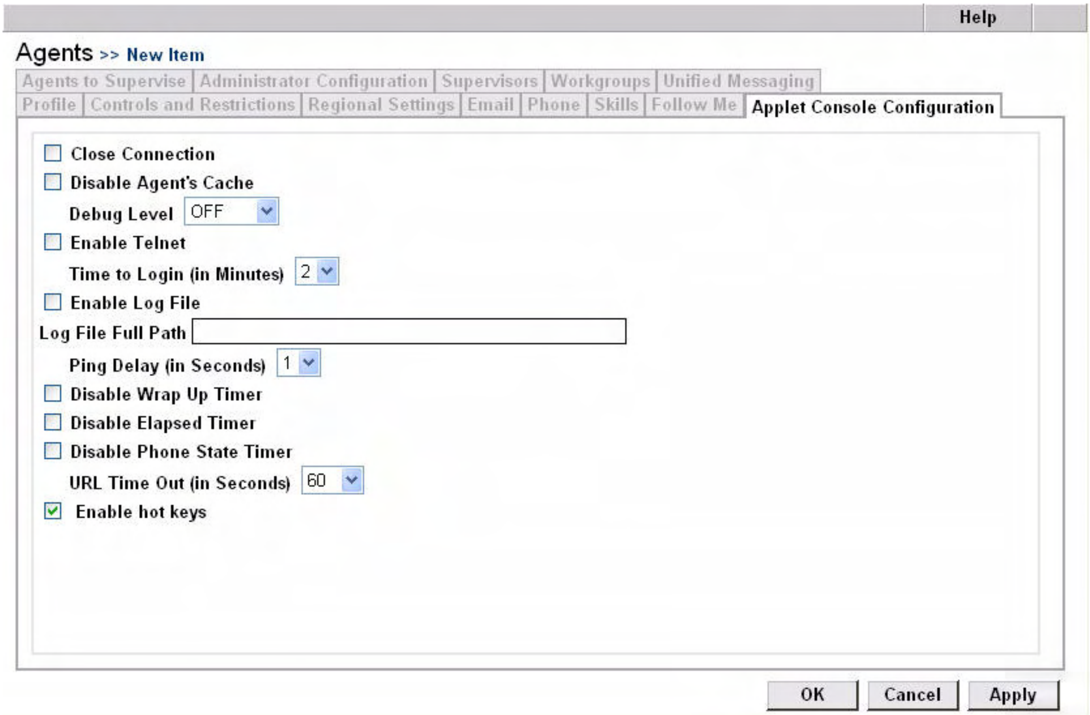


Figure 6-8 Agents Screen: Applet Console Configuration

17. Use the information in Table 6-8 to complete the **Applet Console Configuration** screen.

Table 6-8. Applet Console Configuration Fields and Descriptions

Field	Description
Close Connection	The CCA applications (AM, IM, SM, and so on) occasionally connect to the CCA Web server to determine if any messages (interactions, statistics updates, and so on) exist. If **not** checked, the applications continue to use the same HTTP connection to the Web server forever. If checked, the connection is re-established every 60 requests.

Table 6-8. Applet Console Configuration Fields and Descriptions

Field	Description
Disable Agents Cache	Check this box to change the way CCA normally works (not recommended). When checked, CCA downloads ALL information the application EACH time the user logs in. **Note**: This process can consume major resources on both the server and the user's machine. Unchecked, CCA downloads all information (about status, workgroups, users, URLs, outcomes, and so on) only when a user first logs into IM or SM. Thereafter, CCA keeps this information in memory until the user logs out. Then, CCA writes all the data to temporary files on the user's hard drive. Therefore, the next time the user logs in, CCA only downloads new or changed information (like a new project or outcome) or deleted or edited information, rather than downloading everything.
Debug Level	From the drop-down menu, select how CCA generates different levels of debug information. View debug information in a file, or Telnet window (see below), or the Java Console. • **Off**: CCA will not generate any debug information. • **Debug**: CCA generates most debugging information. • **Info**: CCA generates minimal debug information. • **Error**: CCA generates only error information. • **Fatal**: CCA generates only information about fatal errors. • **All**: CCA generates all debug and error information. **Note**: If you choose to send the information to the Java Console or Telnet, the **All** option will consume most of your memory and CPU.

Table 6-8. Applet Console Configuration Fields and Descriptions

Field	Description
Enable Telnet	Check to view debug information in a Telnet window. • Check the Enable Telnet check box. • Click **OK** (or **Apply**). • Start a Telnet session: “telnet <*hostname*> <*port*>” For <*hostname*>, use the name of the machine where the client application is running. (For example, the name of the machine where Administration Manager is running.) For <*port*>, use: **48000** for Interaction Manager **48001** for Supervisor Manager **48002** for Administration Manager
Time to Login (in minutes)	From the drop-down menu, select how long IM waits before downloading all needed information from the database and logs into the IM server. **Note**: If login takes more than this time, IM automatically logs out.
Enable log file Log File Full Path	Check to allow writing debug information to a file. If checked, enter the log file name and path in the next text box. • The path must include the filename. • Folders are created, if they do not exist. • A debug file writes to this path on every agent’s machine.
Ping Delay in Seconds	From the drop-down menu, select the time CCA applications (AM, IM, SM, and so on) wait before sending the next request to the Web server. Occasionally, CCA applications connect to the CCA Web server to determine if messages (interactions, statistics updates, and so on) exist.
Disable wrap up timer	If checked, agents cannot see the wrap-up timer in IM. This may prevent flicker on some screens.
Disable elapsed (interaction) timer	If checked, the agent cannot see the interaction timer in IM. This may prevent flicker on some screens.

Table 6-8. Applet Console Configuration Fields and Descriptions

Field	Description
Disable Phone State timer	If checked, the agent cannot see the animated phone icon in IM's Information Bar. The agent still sees the on-hook icon. This may prevent flicker on some screens.
Allow Multi ACD Interaction	If checked, CCA allows multiple ACD interactions.
URL Timeout in Seconds	From the drop-down menu, select how long the application (AM, IM, and so on) waits for a response from the Web server before killing the connection and re-sending the request.

18. Click the **Agents to Supervise** tab to access the Agents to Supervise screen (Figure 6-9).

    After creating a supervisor or an administrator account, use this tab to assign existing agents to supervise.

    When a supervisor has an assigned agent, the supervisor can interact (view, monitor, get agent statistics, and so on) with that agent using the SM application.

    Supervisors can only interact with agents assigned to them.

You cannot assign more than 100 agents to the same supervisor.

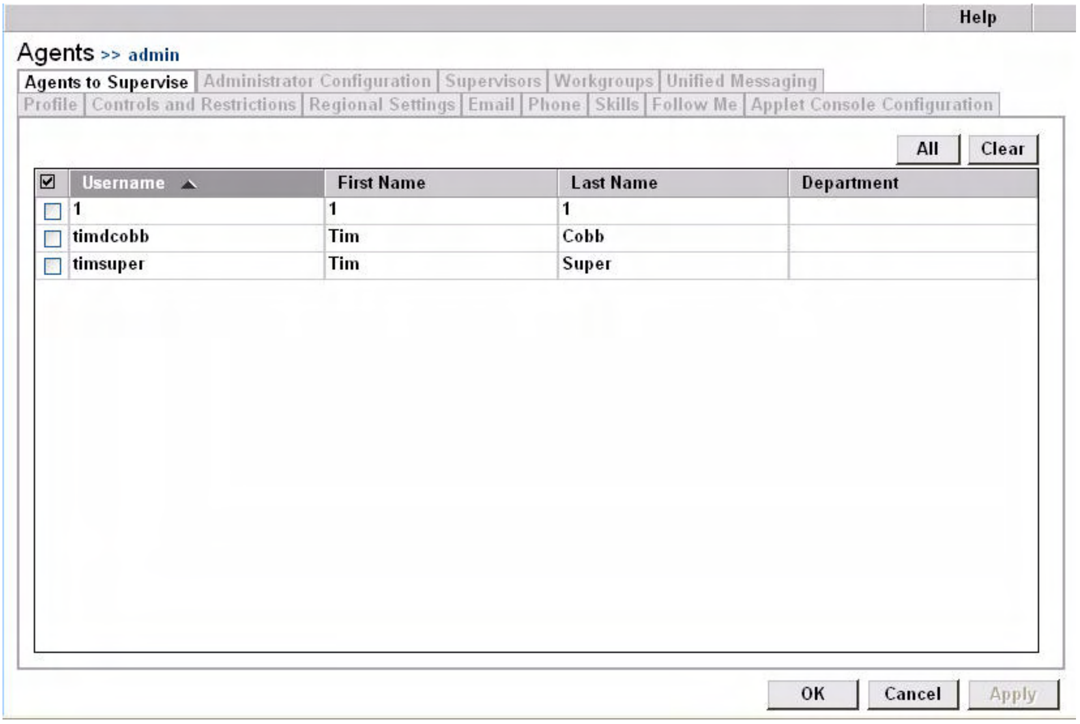


Figure 6-9 Agents Screen: Agents to Supervise

19. Check the box next to each agent to assign to the supervisor.

20. Click the **Administrator Configuration** tab to access the Administrator Configuration screen (Figure 6-10) for limiting admin access to AM features.

    Some changes to this screen are difficult to undo. Please consider changes carefully before you make them.

    - Use this tab only when configuring an administrator.
    - Both Network Administrators and System Administrators can access this tab.
    - The screen lists every navigation bar item in AM. If you uncheck an item, the administrator will not see that item the next time they login.
    - Once an item is unchecked (and applied), you can only restore it by:
        - Direct modification of the database.
        - Deleting the administrator and re-creating the account.

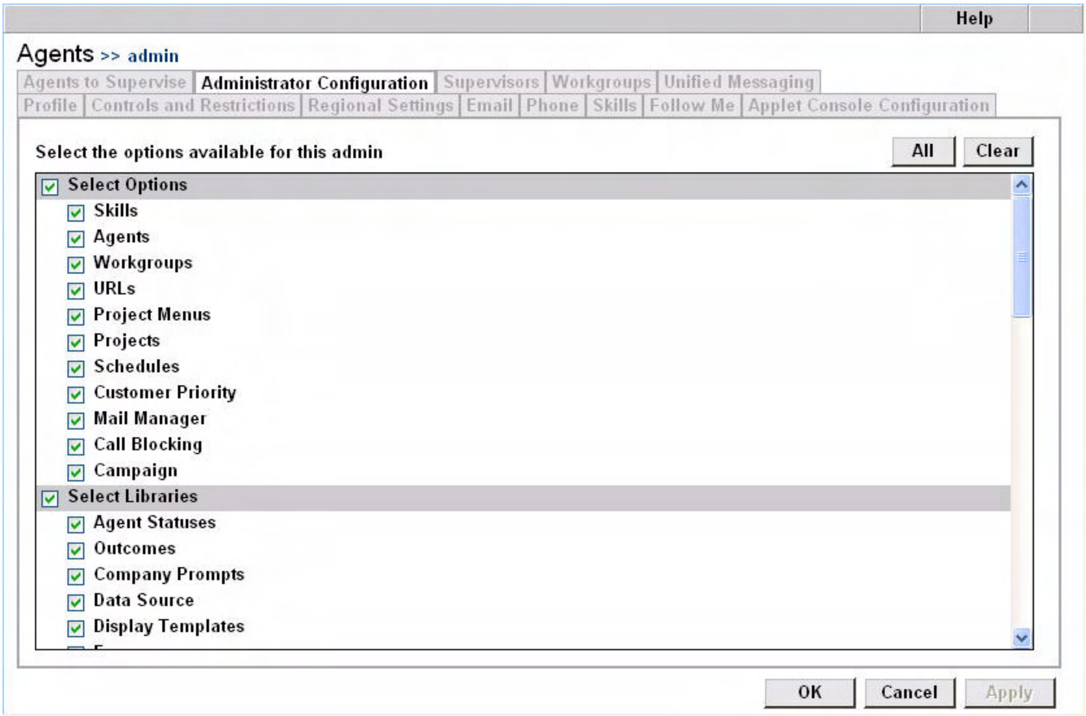


Figure 6-10 Agents Screen: Administrator Configuration

21. Click the **Supervisors** tab to access the Supervisors screen (Figure 6-11).

    After creating an agent account, use this screen to assign them to a supervisor. (You can also assign agents to a supervisor when configuring an existing supervisor account, using the **Agents to Supervise** tab.)

You cannot assign more than 100 agents to the same supervisor.

The Supervisors tab only shows a supervisor if:

- The supervisor has less than 100 agents, or
- The supervisor has 100 agents, but is supervising the agent you are editing.

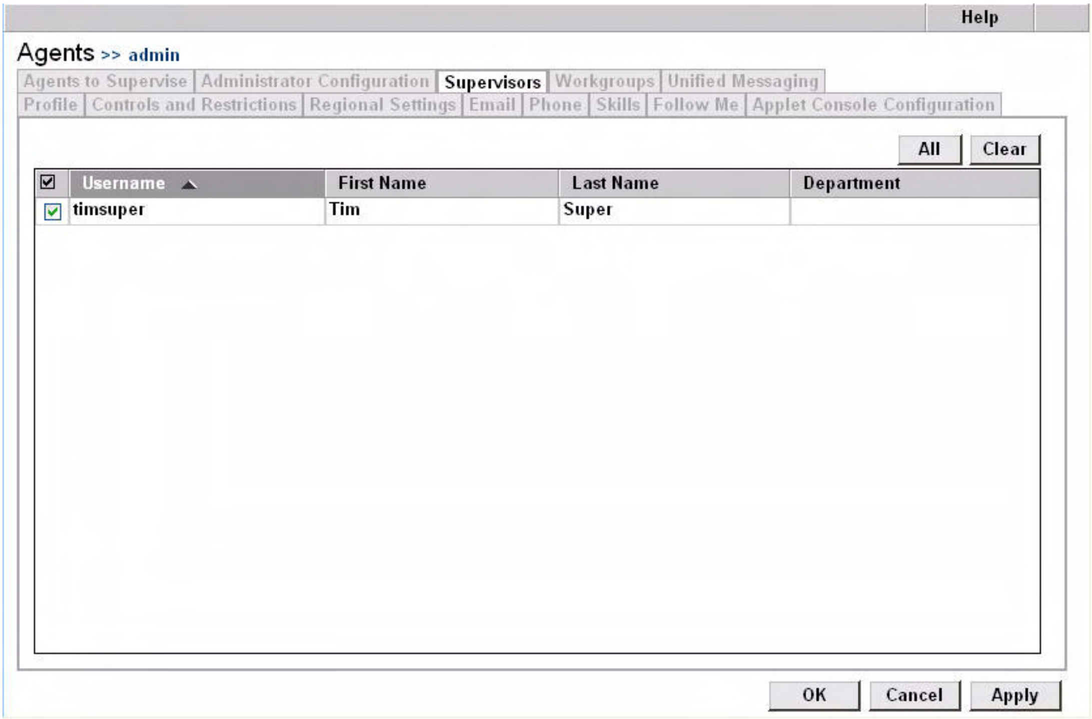


Figure 6-11 Agents Screen: Supervisors

22. Click the check box next to the name of each supervisor who can supervise this agent. (Agents can have multiple supervisors.)

23. Click the **Workgroups** tab to access the Workgroups screen (Figure 6-12).

24. Make the user a member of a specific workgroup by checking the corresponding check box. There is no limit to the number of workgroups to which a user can belong.

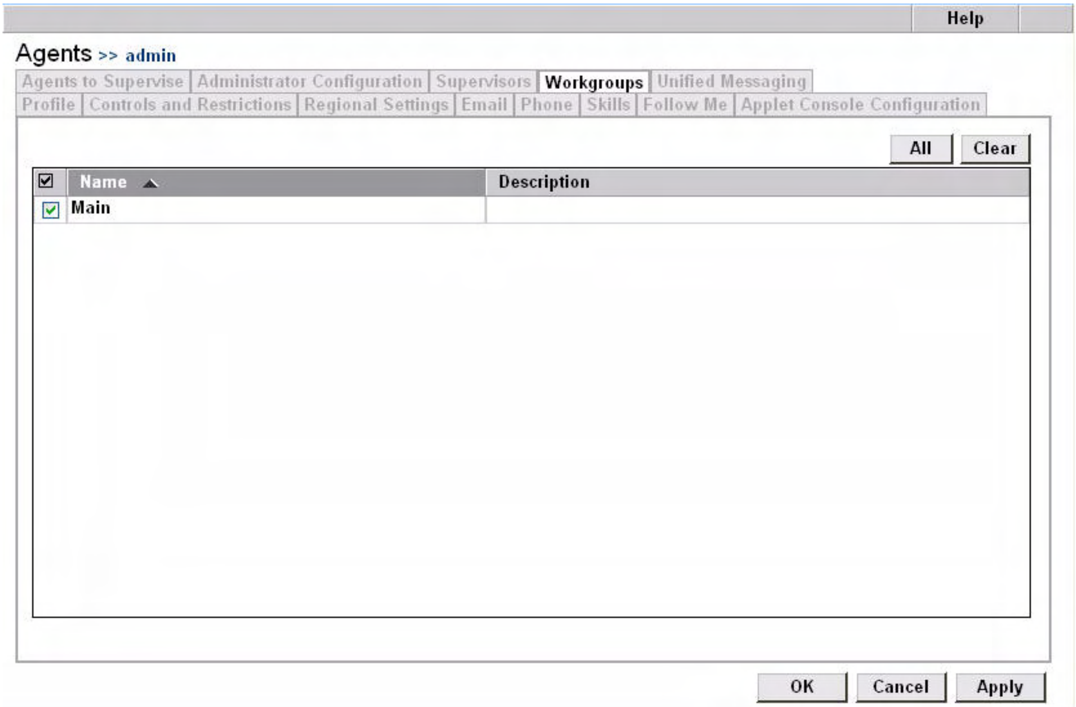


Figure 6-12 Agents Screen: Workgroups

25. Click the **Unified Messaging** tab (Figure 6-13) to identify how to store voicemails.

Storing voicemails as a wave file on the local drive allows fast access to voicemails by phone and provides greater flexibility.

To store on a local drive, CCA uses an FTP Server to store the fields and the database to store the information and status of the voicemail.

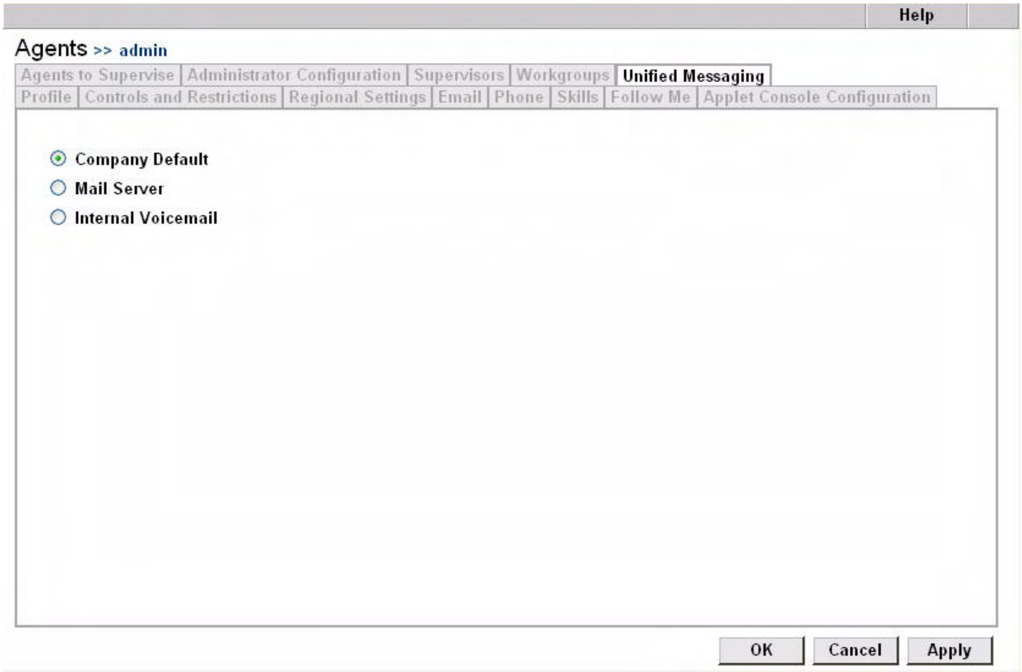


Figure 6-13 Unified Messaging Tab

26. Select one of the following choices:

- **Company Default**: Sets the user to use the company default setting (set in the Unified Messaging tab of the Company screen). For more information, see "Unified Messaging" on page 3-48.

- **Mail Server**: Stores voicemails on the Network Email Server.

- **Internal Voicemail**: Stores voicemails locally.

Finding an Agent

If your company employs many agents, use the agent search tool to quickly locate an agent from a list.

To search for an agent

1. Click **Options** > **Agents**. The Agents main screen (Figure 6-14) appears.

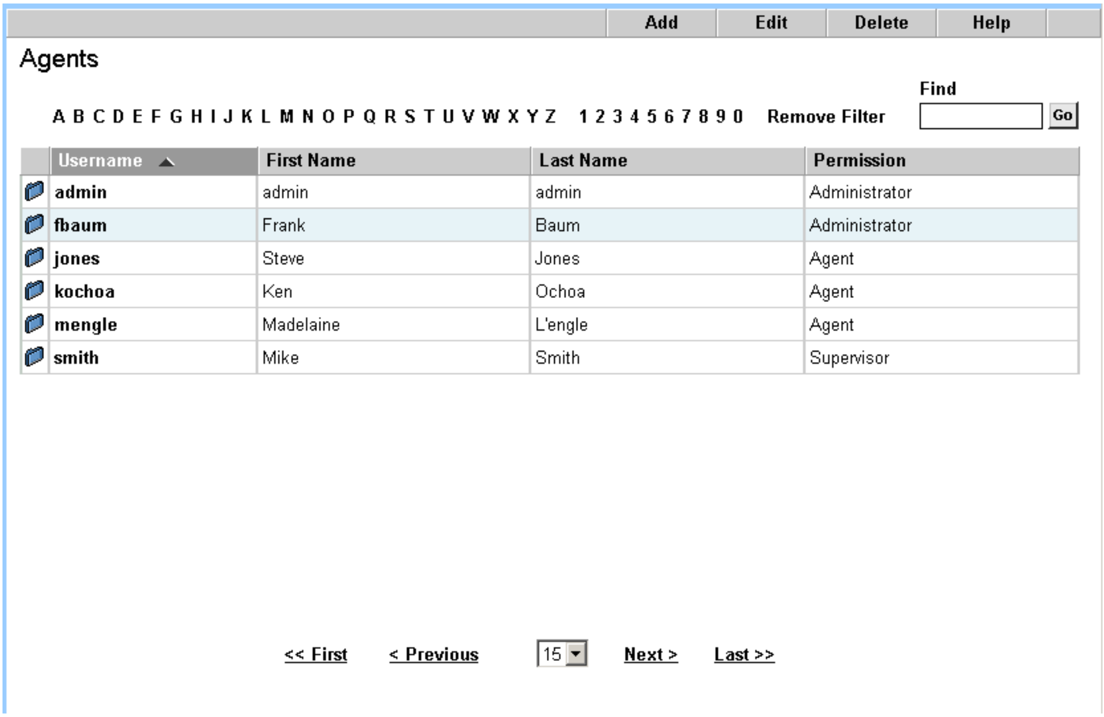


Figure 6-14 Agent List Screen

2. Click a column heading to search for items in that heading.

To see a list of all accounts

1. Make sure the **Find** text box is blank.

2. Click the **Go** button.

3. Sort the agent list by clicking on any column header.

To search on a column

1. Select a column.
2. Click a letter or number (A - Z, 1 - 0).
3. Or select a column, enter a string or substring in the **Find** text box, and click the **Go** button.

To search with a wildcard

1. Select a column.
2. Type **%** (percent) as a wildcard character. Enter a substring and wildcard in the **Find** text box. (For example, type **Rog%**, or **%og%**, or **%er** to match **Roger**.)

You cannot use wildcards when searching on the **Permission** column**.**

Example 1: Display all agents (no supervisors or administrators).

1. Click the **Permission** column heading.
2. In the Find text box, enter **agent**.
3. Click the **Go** button. Only agents appear in the list.

Example 2: List everyone whose last name begins with “R”.

1. Click the **Last Name** column heading.
2. From the alphabet (above the results), click the letter **R**.
3. All agents, supervisors, and administrators whose last name begins with R appears.

If your search returned more than one page of agents, use the controls at the bottom of the list to move from page to page.

Change how many agents to display on each page by clicking the number list box at the bottom of the screen.

Use the information in Table 6-9 to navigate this screen.

Table 6-9. Agent Screen Navigation

Click...	To Display...
<<First	Click to display the beginning of the agent list.
<Previous	Click to display the previous group of agents (based on the maximum number to display).
Next>	Click to display the next group of agents (based on the maximum number to display).
Last>>	Click to display the end of the agent list.

Deleting an Agent Account

Deleting departed or unused agents a frees space in the CCA database and ensures that an invalid agent account will not appear in AM screens.

Before deleting an agent account, ensure that CCA is not using the account by checking the following areas:

- Remove the agent account as the designated voicemail greeting for all workgroups. See the workgroup option: “Go to voicemail, play Agent greeting” on page 7-16.
- Remove the agent account assignment from all supervisors. See “Deleting an Agent Account” on page 6-31.
- Remove the agent account as the routing target for calls reaching a phone project. See the **Agent** option in “Adding Phone Interactions to a Project” on page 10-5.
- Remove the agent account as the routing target for a touch-tone menu selection. See the **Extension** option in “To create a Standard Menu” on page 8-11.

To delete an agent

1. Click **Options** > **Agent > Profiles** tab.
2. Find the Agent to delete (see “Finding an Agent” on page 6-28) and click it.
3. Click the **Delete** button. A delete confirmation message (Figure 6-15) appears.

Figure 6-15 Delete Confirmation Message

4. Click **OK**.

Setting Up Workgroups

This chapter introduces CCA Workgroups and describes how to use AM to:

- Create workgroups
- Add agents to workgroups
- Add agent skills to a workgroup
- Specify the relative importance of each agent skill for the workgroup
- Set workgroup options
- Define workgroup overflow conditions and actions

What is a Workgroup?

A CCA Workgroup is a group of agents that do the same or similar job in the call center. In many cases, these workgroups parallel the company's departments.

For example, you might create workgroups called "Sales," "Technical Support," and "Customer Service," to represent the agents who work in those departments in the company.

The agents in a CCA workgroup do not need to be sitting in the same room or even in the same building. Because CCA agents can connect from any computer with an Internet connection, workgroup members can reside in various, distributed locations.

Workgroups also allow you to specify the agent skills that are important for agents in a workgroup to possess. By assigning weights (importance) to the agent skills in a workgroup, CCA can identify and route interactions to the agent most qualified to receive them.

Finally, workgroups allow *customer prioritization*. For example, if a customer (identified as “Platinum”) enters a workgroup queue, you can make sure this caller reaches an agent before a “Standard” customer. See Chapter 12, “Customer Priority,” for information on assigning a priority level to each customer.

Not all call centers use workgroups. If you do not need to route customers to different groups of agents and you do not use customer prioritization, then you can route callers directly to specific agents and do not need to create workgroups for the call center.

If No Workgroup Agents are Logged In

If CCA routes a phone interaction to a workgroup for which no agents are logged in, CCA lets the caller leave a message and changes the interaction type from “ACD Call” to “ACD Voicemail.”

Then, when an agent who is a member of the workgroup logs into the IM, CCA immediately sends the “ACD Voicemail” interaction to the agent for handling.

Call Flow Overview

Here is how CCA routes a call to an agent:

1. A customer calls the call center.

2. CCA uses the number that the customer dialed to find the corresponding project.

3. The call center verifies that the company has a valid license.

4. CCA routes the call to a workgroup queue and waits for the ACD Server to assign the call to an agent.

5. When an agent is available, the CTI Server finds the agent’s extension. CCA dials the agent’s extension and the IM Server offers the interaction to the agent.

Creating a Workgroup

Before creating a workgroup, the following must exist:

- Agent accounts. (See “Creating Administrator, Agent, and Supervisor Accounts” on page 6-1.)
- Defined agent skills to support the workgroup. (See “Creating an Agent Skills Library” on page 4-2).

To create a workgroup

1. Click **Options** > **Workgroups** > **Add** button.

   The Add Workgroups screen (Figure 7-1) opens to the Name tab.

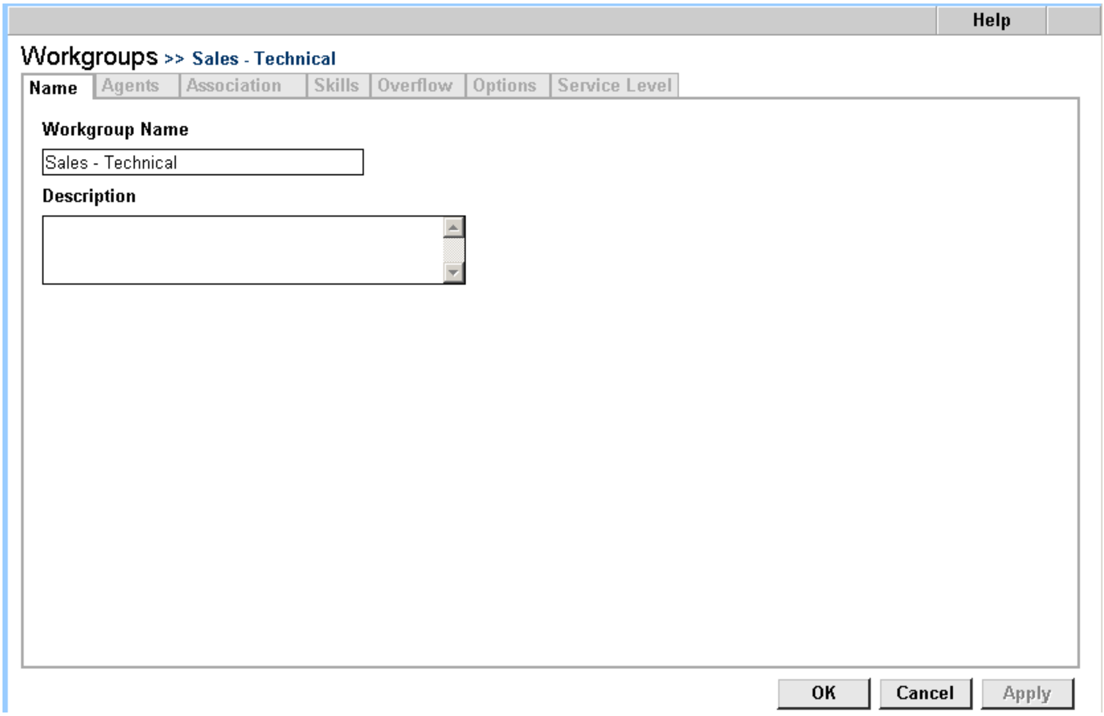


Figure 7-1 Workgroups Screen: Name Tab

2. Using the information in Table 7-1, complete the field.

Table 7-1. Workgroup Name Tab Fields and Descriptions

Field	Description
Workgroup Name	Enter the name for this Workgroup
Description	Enter text describing how you will use this Workgroup, the common job function performed by Agents in this Workgroup, or the types of customers this Workgroup will handle.

3. Click **Apply**.

Adding and Removing Agents from Workgroups

Before adding agents to a workgroup, agent accounts must already exist. (For how to create agent accounts, see “Creating Administrator, Agent, and Supervisor Accounts” on page 6-1.)

To add and remove agents to and from a workgroup

1. Click **Options** > **Workgroups**.
2. Click the desired workgroup and then click **Edit**. The Workgroups screen appears.
3. Click the **Agents** tab to access the Workgroups screen, Agents tab (Figure 7-2).

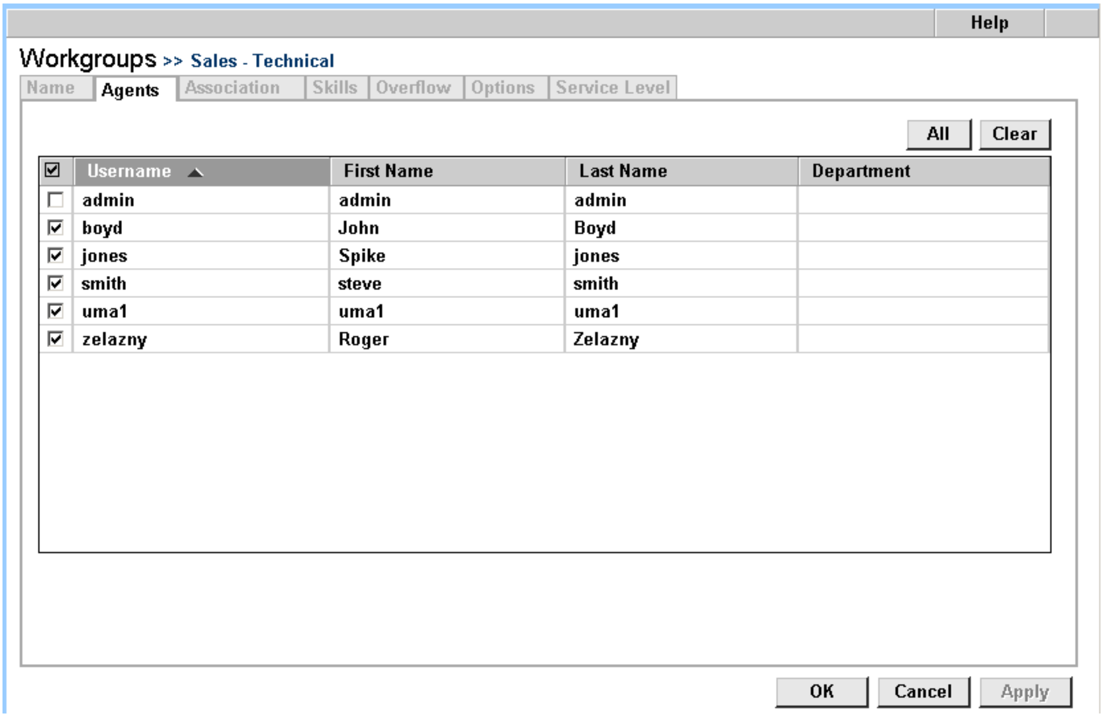


Figure 7-2 Workgroups Screen: Agents Tab

4. Click the check box next to an agent’s name to add the agent to the workgroup. (The same agent can belong to multiple workgroups.)

    a. To add all agents to the workgroup, click the **All** button.

    b. To remove all agents from the workgroup, click the **Clear** button.

5. Click **Apply**.

Setting a Routing Association

Normally, CCA routes new interactions to the first available agent in the workgroup. However, you can use the Association tab to route a customer to the last agent who worked with that customer.

1. Click **Options** > **Workgroups**.
2. Click the desired workgroup and click **Edit**. The Workgroup screen appears.
3. Click the **Association** tab (Figure 7-3).

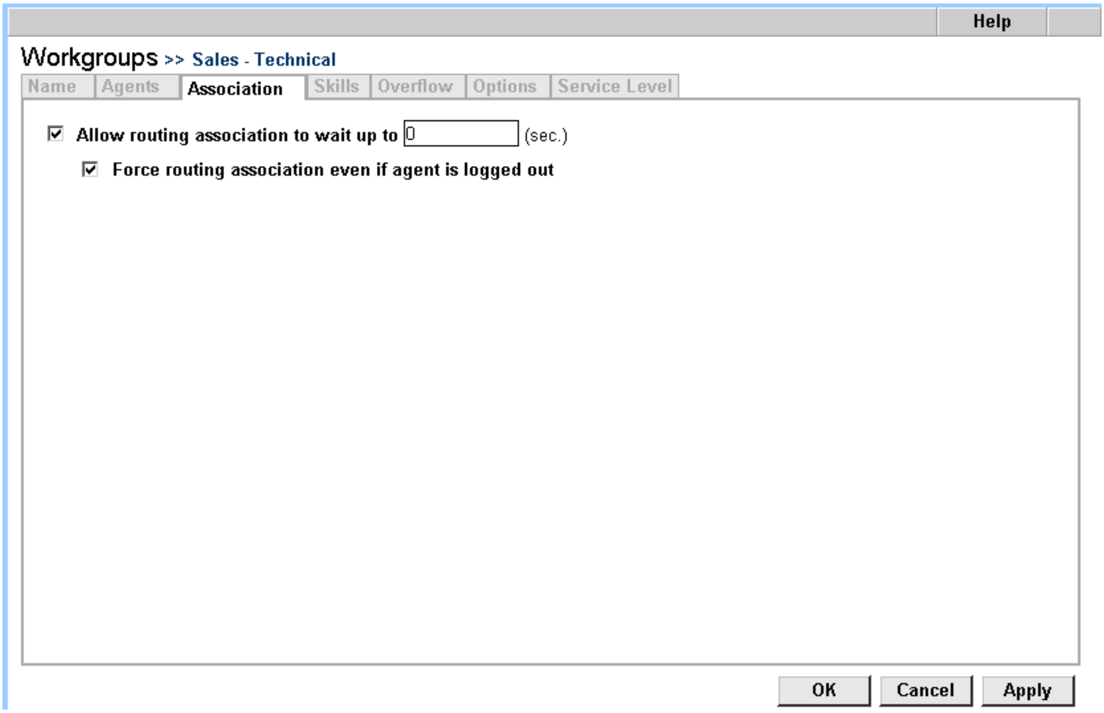


Figure 7-3 Workgroups Screen: Association Tab

4. Using the information in Table 7-2, complete the Association screen.

Table 7-2. Workgroups Association Tab Fields and Descriptions

Field	Description
Allow routing association to wait up to [ ]seconds	If checked, CCA tries to route the interaction to the agent who took the last interaction from this customer (the ***preferred Agent***). If that agent is not available within the amount of time set, CCA routes the interaction to the first available agent in the workgroup. CCA only tries to route to the preferred agent if: • The agent account was not deleted. • The agent is still a member of the workgroup that received the interaction. • The agent is logged in.
Force routing association even if Agent is logged out.	If checked, CCA tries to route the interaction to the preferred agent, even if the agent is logged out. CCA waits for the amount of time set in the Seconds text box (above). If the agent does not log in within that time, CCA routes the interaction to the next available agent.

Assigning Skills to a Workgroup

CCA uses agent skills to identify and route callers to the agent most qualified to handle the interaction. Specify the importance of each skill in the workgroup so that customers reaching the workgroup are connected to the agent best qualified to handle the interaction.

When CCA routes a call requiring a specific agent skill to a workgroup, it chooses an agent based on a formula that considers both the agent's score for the required skill *and* the weight you assign to that skill for agents in this workgroup.

To weigh the skills in a workgroup

1. Click **Options** > **Workgroups**. The Workgroups screen appears.
2. Click the desired Workgroup and then click **Edit**. The Edit Workgroups screen opens.
3. Click the **Skills** tab (Figure 7-4).

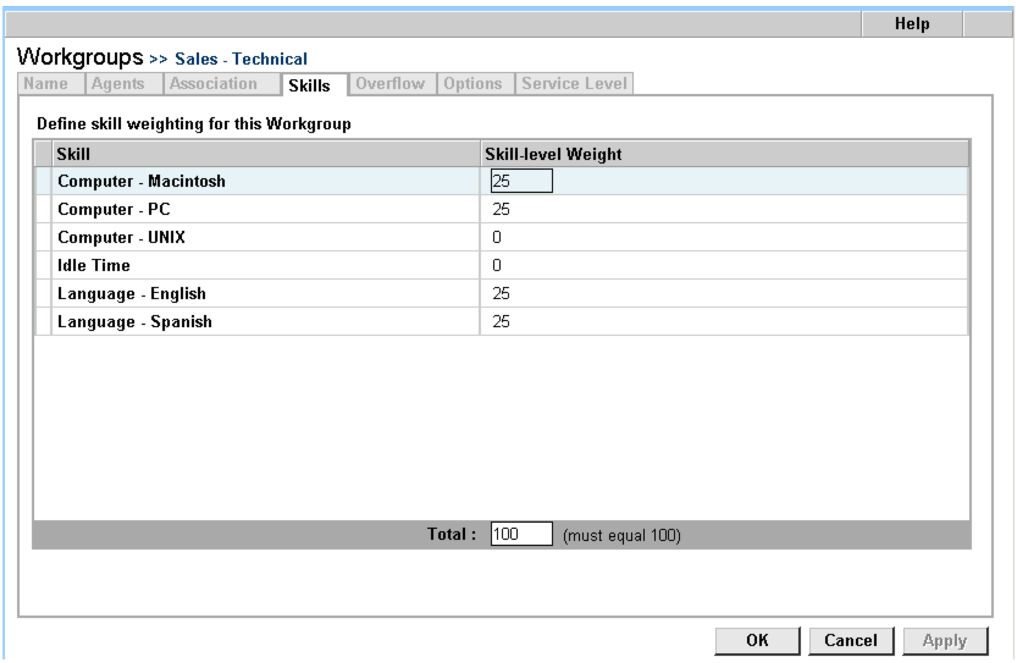


Figure 7-4 Workgroups Screen: Skills Tab

4. In the Skill-level Weight column, type the weight number (importance) to assign to each skill. Assign a weight of **0** to indicate that this skill should not be considered when selecting the best agent to receive the Interaction.

The combined weights for all skills in the workgroup must equal **100**.

---

5. Click **OK**.

Defining Workgroup Overflow Conditions

To make sure that interactions waiting too long for an agent are given immediate attention, define workgroup overflow conditions. CCA handles two workgroup overflow conditions:

- Interaction wait-time exceeded
- Number of queued interactions exceeded

CCA implements the overflow action you specify if a customer has been waiting in a workgroup queue longer than the maximum time or if the number of queued interactions exceeds the maximum.

You can configure all overflow conditions, parameters, and corrective actions. You can raise the customer's interaction priority or let the interaction go to a queue handled by both the original workgroup and the overflow workgroup, so that the interaction is answered in by the first available agent in either workgroup.

To set workgroup overflow conditions

1. Click **Options** > **Workgroups**. The Workgroups screen appears.

2. Click the desired Workgroup and then click **Edit**. The Edit Workgroups screen appears.

3. Click the **Overflow** tab to access the Overflow screen.

4. Check **Enable Workgroup overflow**.

   The screen refreshes to display the Workgroup Overflow screen (Figure 7-5).

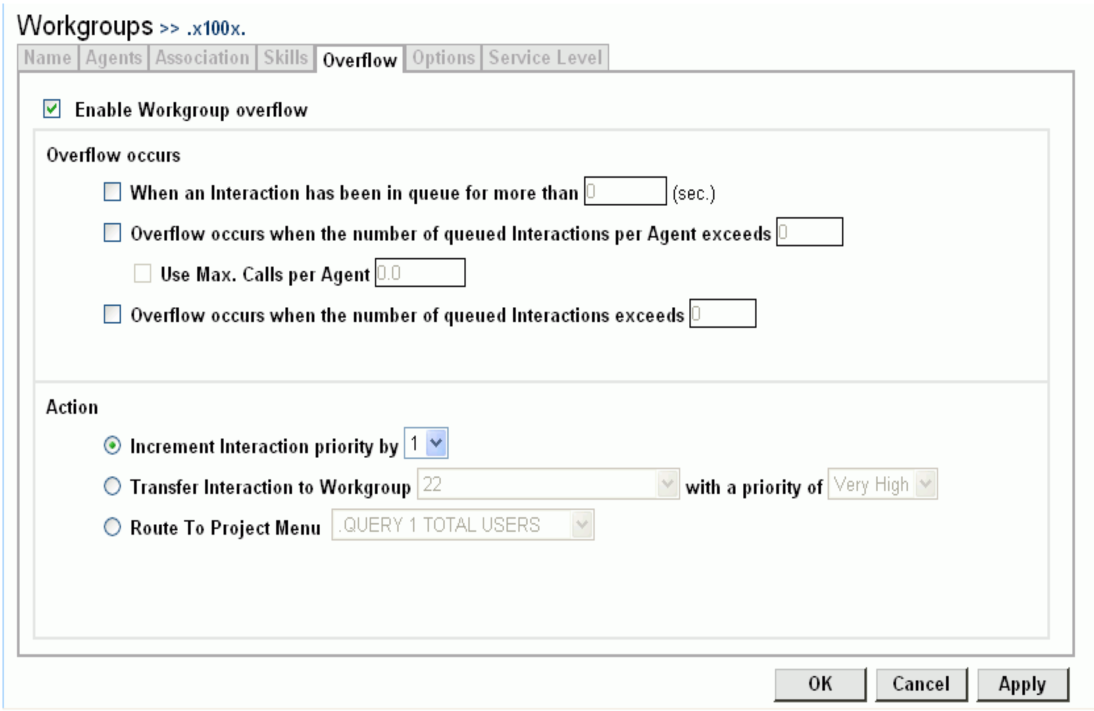


Figure 7-5 Workgroups Screen: Overflow Tab

5. Using the information in Table 7-3, complete the fields on the Workgroup Overflow tab.

Table 7-3. Workgroup Overflow Fields and Descriptions

Field	Description
Overflow occurs when an Interaction has been in queue for more than ___ min.	Check to take the specified overflow action on the interaction in the front of the queue, if the interaction has been waiting longer than the time you specify.
Overflow occurs when the number of queued Interactions per Agent exceeds ___	Check to take the specified overflow action on the interaction in the front of the queue, if the ratio of interactions to agents exceeds the number you specify.
Use Max. Calls per Agent	Check this box and enter the maximum calls Agents can accept. You do not need to restart the ACD Server to enable this change.

Table 7-3. Workgroup Overflow Fields and Descriptions

Field	Description
Overflow occurs when the number of queued Interactions exceeds ___	Check to take the specified overflow action on the interaction in the front of the queue when the number of interactions in the queue exceeds the number you specify.
Increment Interaction priority by ___	Choose to increment the interaction's priority** setting by the specified number, when the specified **Overflow occurs** condition is met.
Transfer Interaction to Workgroup ___ with a priority of ____	Choose to move the interaction to the specified workgroup and adjust the interaction's priority** when the specified **overflow occurs** condition is met. **Note**: A phone interaction transferred to an overflow workgroup does not hear the workgroup prompts for the overflow workgroup. (See "Select Prompts for this workgroup" on page 7-17 for information on Workgroup prompts.)
Route to Project Menu	Route the call to a project menu (phone menu). (See Chapter 8, "Creating Project Menus" for more information.)
** The IM Information Bar displays the priority of the transferred interaction as selected when defining the workgroup overflow condition.	

6. Click **OK**.

Setting Workgroup Options

1. Click **Options** > **Workgroups**. The Workgroups screen appears.

2. Click the desired Workgroup and then click **Edit**. The Edit Workgroups screen appears.

3. Click the **Options** tab (Figure 7-6).

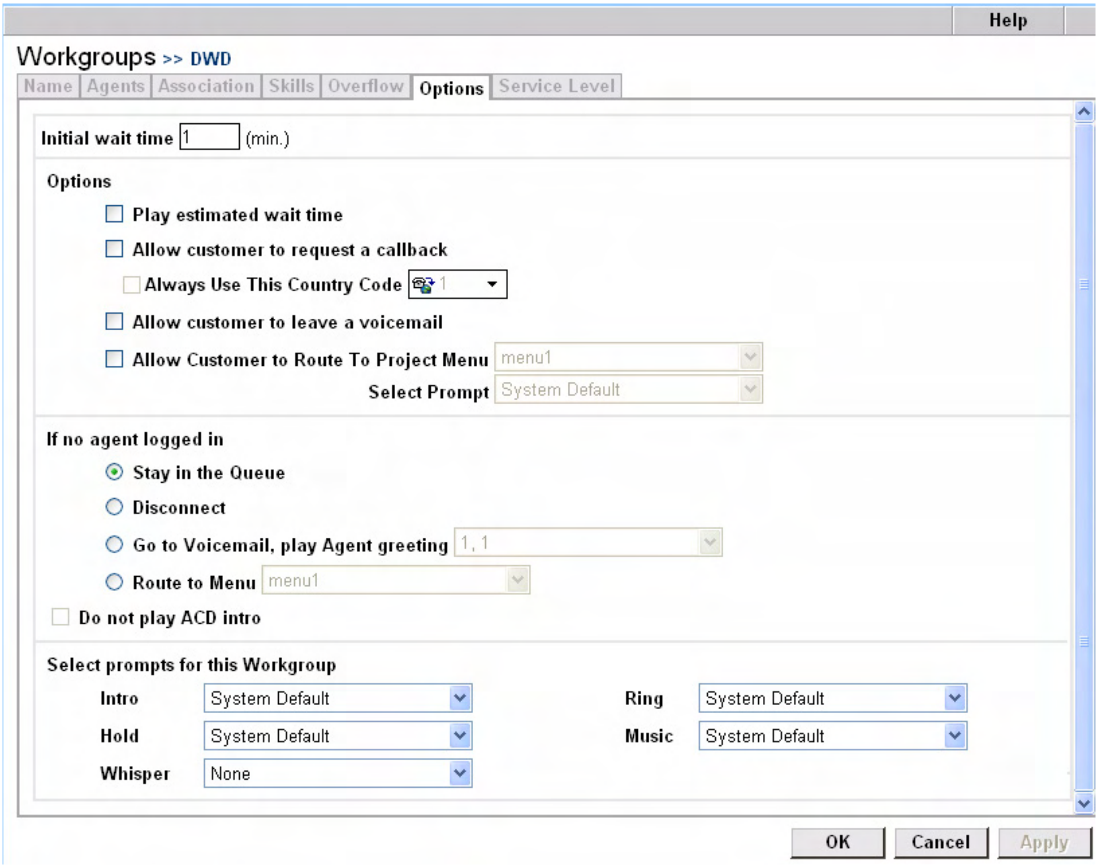


Figure 7-6 Workgroups Screen: Options Tab

4. Using the information in Table 7-4, complete the fields in the Workgroup Options tab.

Table 7-4 Workgroups Options Tab Fields and Descriptions

Option	Description
Initial Wait Time	Type the number of minutes it takes an agent to complete a typical interaction. CCA uses this number as a baseline to begin calculating the average wait time to report to callers. The actual wait time reported to callers reflects the conditions in the workgroup and may be different than the wait time you enter here. CCA uses actual historical wait times to calculate average wait time, after new interactions enter the workgroup.
Play estimated wait time	Check to inform the customer (phone or Web chat) of their estimated wait time. If the customer's estimated wait time is greater than **99** minutes, CCA does not inform the customer of the wait time. **Note**: If you change the setting for **Play estimated wait time**, you must re-create your Chat Request form for the changes to take effect in your chat project. (See "Chat Request Forms" on page 10-64 for information on re-creating your Chat Request form.)
Allow customer to request a callback	Check to let the caller request a callback, if agents are busy. Checking this box causes the system to play the prompt `acdcallback.wav` to the customer and allows the customer to enter a number where they can be reached. (See "Workgroup Option Prompts" on page 5-22.) **Notes**: • If the customer enters a callback number that is different than the number that originated the call, CCA uses the customer-supplied number to perform the callback and to look up the customer's contact information during the callback interaction. • For agents to *reschedule* a callback, you must also require outcomes. (See "Outcomes and Rescheduled Callbacks" on page 4-12.)
Always Use This Country Code	If not checked, CCA prompts the customer for their country code. If checked, CCA calls the customer back using the country code specified here.

Table 7-4 Workgroups Options Tab Fields and Descriptions

Option	Description
Allow customer to leave a voicemail	Check to allow a caller waiting in the queue to leave a voicemail message for the next available agent. CCA prompts the caller to enter the following prompts (played in this order): 1. `acdmenu.wav` 2. Greeting for the selected agent 3. `acdvoicemail.wav` See "Workgroup Option Prompts" on page 5-22 for more information about the `acdmenu.wav` and `acdvoicemail.wav` prompts.
Allow Customer to Route to Project Menu	Check to allow a caller waiting in queue to select the option to be routed to a new project menu. CCA automatically plays a default prompt (acdnewmenu.wav). You may also choose another prompt from the **Select Prompt** list.
Stay in the Queue	If selected, the caller remains in the queue until an agent logs in and becomes available.
Disconnect	If selected, and no agent is logged in, the caller is disconnected immediately.
Go to voicemail, play Agent greeting	Tells CCA to select an agent with a recorded greeting. CCA sends the call to the voicemail and plays the agent's greeting followed by `acdvoicemail.wav` ("press one to leave a voicemail message"). See "Allow customer to leave a voicemail" on page 7-16.
Route to Menu	Routes the caller to the menu you select from the drop-down list. (Use this, after meeting specific thresholds, to discontinue answering calls and give new callers an intercept message. For more information, see Chapter 8, "Creating Project Menus".)
Do not play ACD intro	If checked, CCA does not play the prompt under "Select Prompts for this Workgroup > Intro list box" (bottom of the Options tab screen) if no agents are logged in. (If you know that no agents are available and you want to route the call to ***Disconnect***, ***Go to Voicemail***, or ***Route to Menu***, you probably do not want to play an ACD intro prompt telling the customer to wait for an agent.)

Table 7-4 Workgroups Options Tab Fields and Descriptions

Option	Description
Select Prompts for this workgroup	Workgroups can play several types of prompts. For each type, select the System Default or a custom prompt. (See "Creating a Company Prompt Library" on page 4-16.) **Intro**: The initial greeting CCA plays to the caller when entering the workgroup. Choose **System Default** to play the **acdintro** prompt file (see page 5-22). **Hold**: The prompt CCA plays to a caller who just entered the queue for the first time or who has returned to the queue after being unable to reach an agent. (The agent was logged out or did not answer). CCA plays the Hold prompt after the Music prompt ends. Choose **System Default** to play the **acdrepeat** prompt file (see page 5-22). **Whisper**: The prompt CCA plays to an agent right after the agent accepts an ACD call and while working **off-hook**. The customer can't hear the prompt. **Ring:** The prompt CCA plays when the system is connecting the caller to an available agent. Choose **System Default** to play the **acdring** prompt file (see page 5-22).
	Music: CCA plays the Music prompt right after the **Intro** prompt, while the caller is waiting to be connected to an agent. When the **Music** prompt finishes playing, CCA plays the **Hold** prompt. The **Music** and **Hold** prompts repeat until an agent becomes available. Choose **System Default** to play the **music** prompt file (see page 5-22).

Notes for "Select Prompts for this workgroup"

- The "Select Prompts for this workgroup" list box only shows custom prompts created in your "current" login language. For example, if you:

  - Select English in the login page, login, and create a custom prompt, and then,
  - Logout, select Spanish in the login page, and login.

  You won't see your custom prompts, because you created them while you were logged in using English, and you are now logged in using Spanish.

- The <u>order</u> in which CCA plays workgroup prompts can be affected by the “Allow customer to leave a voicemail” and “Allow customer to request a callback” features (described above).

5. Click **Apply.**

Setting Workgroup Service Levels

A Workgroup Service Level lets a supervisor monitor whether online and offline interactions are being accepted at a specific rate. For example, the managers of a call center may want:

- 50% of all *online* interactions to be accepted by an agent in one minute or less.
- 50% of all *offline* interactions to be accepted by an agent in three minutes or less.

In the example in Figure 7-7, the Online Service Level is 60 seconds and the OffLine Service Level is 180 seconds.

Therefore, when a supervisor looks at the Service Level Workgroups screen, the supervisor sees the percentage of online and offline interactions (since 12:00:00 AM today) meeting those requirements.

In this example,
- Online Service Level = 30 seconds
- Offline Service Level = 180 seconds

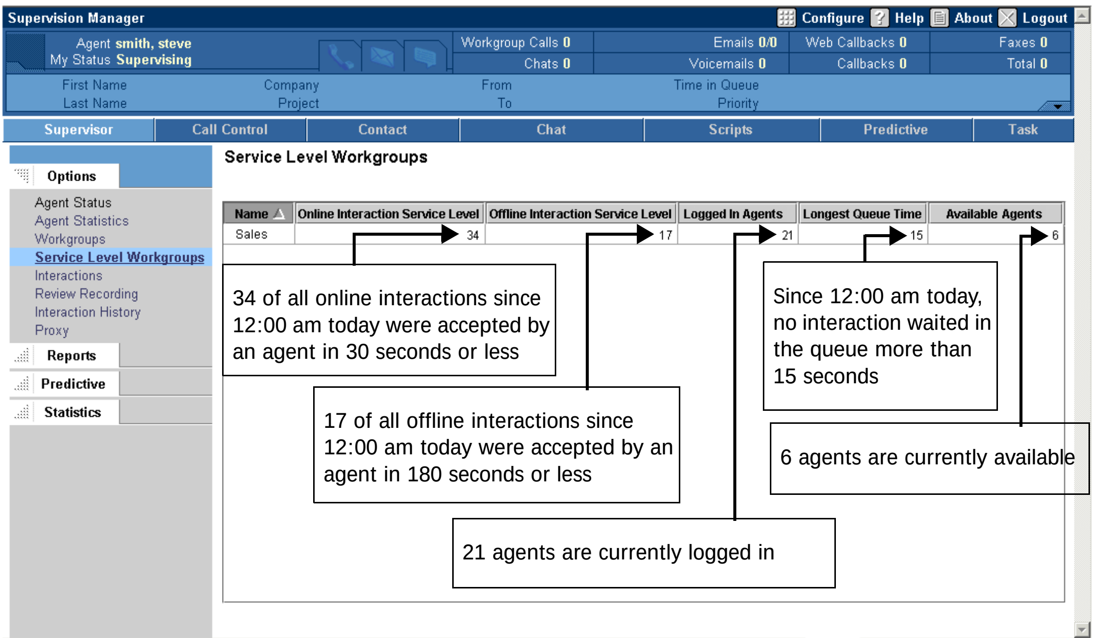


Figure 7-7 Example Service Level Workgroups Monitoring

For Service Levels, online and offline interactions are defined as:

- **Online**: ACD Phone, ACD Voicemail, ACD Callback, Web Callback, and Chat
- **Offline**: ACD Fax, ACD Email

When calculating service level, time:

- Starts when an interaction reaches the call center.
- Stops when an agent accepts the interaction.

Therefore, the Service Level Time includes:

- The time a customer spends waiting in a queue
  and
- The time the customer spends listening to prompts

To set service levels for a workgroup

1. Select **Options** > **Workgroups** > **Service Level**.

2. From the list box menus, select a service level for online and offline interactions.

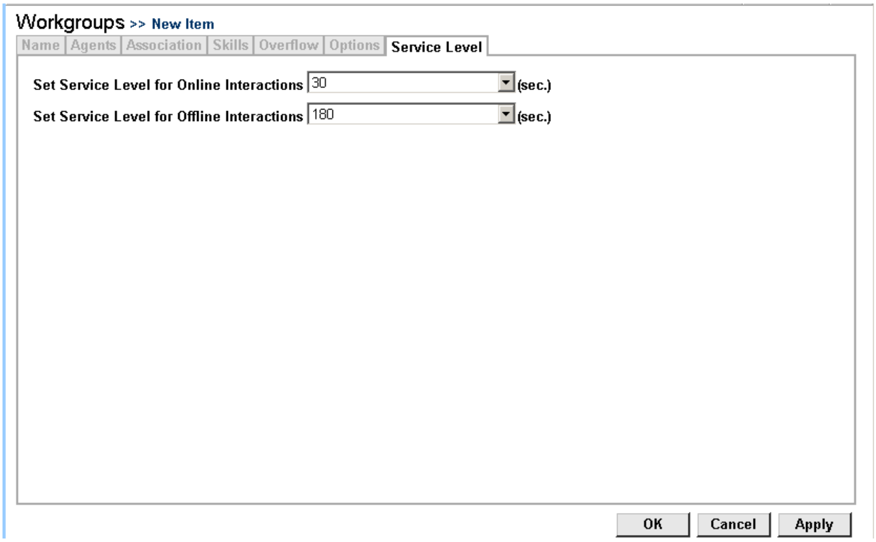


Figure 7-8 Workgroups Screen: Service Level Tab

3. Click **OK** (or **Apply**).

Deleting a Workgroup

Delete a workgroup when it is no longer needed. The deleted workgroup is no longer available to receive interactions, but it remains available for reporting on in AM Reports.

Before deleting a workgroup, ensure that the workgroup is not in use by checking these areas:

- Remove the workgroup as the routing destination for incoming interactions in all CCA Projects. See “Creating a Project Definition” on page 10-1.

- Remove the workgroup as a touch-tone option in all project menus. See the Workgroup option in the section “To create a Standard Menu” on page 8-11.

To delete a workgroup

1. Click **Options** > **Workgroups**.

2. Click the Workgroup to remove.

3. Click the **Delete** button. A confirmation message (Figure 7-9) appears.

Figure 7-9 . Delete Confirmation Message

4. Click **OK**.

Creating Project Menus

A basic call center does not require project menus (phone menus). CCA can route callers to agents using a simple project, which does not require the caller to make any choices from a menu. However, project menus are useful to:

- Give the caller choices in navigating the call center.
- Complete some pre-work before delivering a call to an agent.
- Have an interaction handled completely without the need for agent intervention.

Types of Menus

Administration Manager uses five types of menus for adding a new Project Menu.

To access project menu types

1. Click **Options** > **Project Menus** > **Add** button.

   The Add Project Menus screen (Figure 8-1) appears.

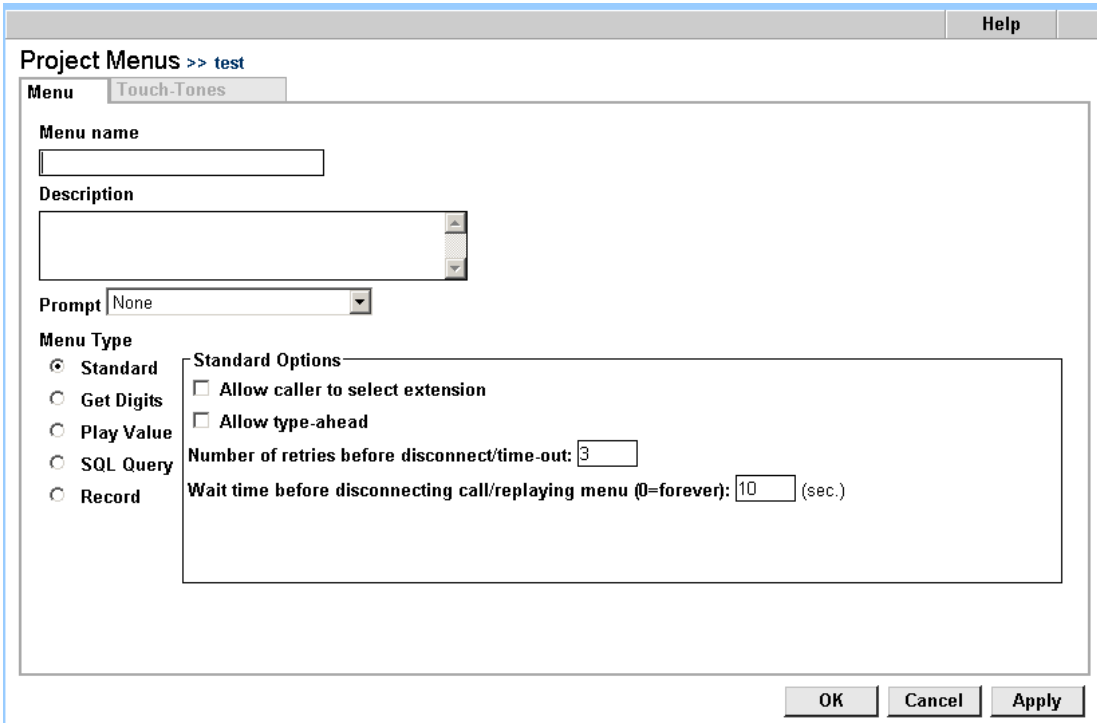


Figure 8-1 Standard Menu

Table 8-1 shows each menu type and its purpose. Most call centers use all (or nearly all) of the menu types to accomplish their overall goal.

Table 8-1. Menu Types and Descriptions

Menu Type	Description
Standard	For general purpose call routing: • CCA can route calls to many different locations (including agents, workgroups, projects, other menus, and so on). • Supports using variables and a "case" like data structure.
Get Digits	Allows CCA to capture data a caller enters in a variable. This menu supports the same routing features and "case" like data structure as a Standard menu.

Table 8-1. Menu Types and Descriptions

Menu Type	Description
Play Value	CCA plays a prompt or a value (the contents of a variable) to the caller. This menu supports the same routing features and "case" like data structure as a Standard menu. **Note:** A Play Value menu can correctly read negative numbers.
SQL Query	CCA runs an SQL query against almost any database. The SQL query can include project menu variables. CCA can capture the SQL result table in a project menu variable. This menu supports the same routing features and "case" like data structure as a Standard menu.
Record	CCA records a caller for the time you specify. Later, you can listen to the recording. This menu supports the same routing features and "case" like data structure as a Standard menu.

Think of menu types as building blocks for constructing features or routing solutions in the call center.

Table 8-2 shows an example where the goal is to give the customer their account balance. Notice that

- Each menu only accomplishes a small part of the overall goal.
- This design lets you combine menus to create a wide variety of very sophisticated features.

Table 8-2. Customer Action and Call Center Response

Customer	Call Center
A customer calls the call center.	The customer calls a phone number associated with a project. The project routes the call to a Play Value menu.
The caller is prompted to enter their account number.	The Play Value menu plays a prompt: "Welcome to the call center. Please enter your account number" and routes the call to a Get Digits menu.
The caller enters their account number.	The Get Digits menu captures the customer's account number in a variable and routes it to an SQL Query menu.

Table 8-2. Customer Action and Call Center Response

[No action]	The SQL Query menu queries a database, using the customer's account number, to find the customer's account balance. The customer's balance is stored in a variable and the call is routed to a Play Value menu.
[No action]	The Play Value menu plays a prompt: "Your current balance is" and routes the call to another Play Value menu.
[No action]	The last Play Value menu reads the value of the account balance variable to the customer. For example, "four hundred and twenty three dollars."

Using Variables in Menus

Use Project Menu variables to:

- Share values between project menus.
- Trap values that are entered by customers in a menu.
- Add values to, and trap values coming back from, an SQL query.

AM uses system-variables and user-defined variables. You can use both in every type of menu. When using variables, CCA passes the information (such as a user's account number) as a URL parameter to the IM program.

User-Defined Variables

User-defined variables can store values, capture customer entries, and share values between menus.

To create user-defined variables

In any AM menu type, you can create and access user-defined variables. Every menu type provides several locations to enter the name of a variable. (This chapter explains all of these locations.)

Entering the variable name in one of the many locations. CCA does not require any other action to instantiate or initialize the variable.

For example, when creating a ***Get Digits*** menu:

1. Click **Options**, **Project Menus**, **Add** button.

   The Add Project Menus screen (Figure 8-2) appears.

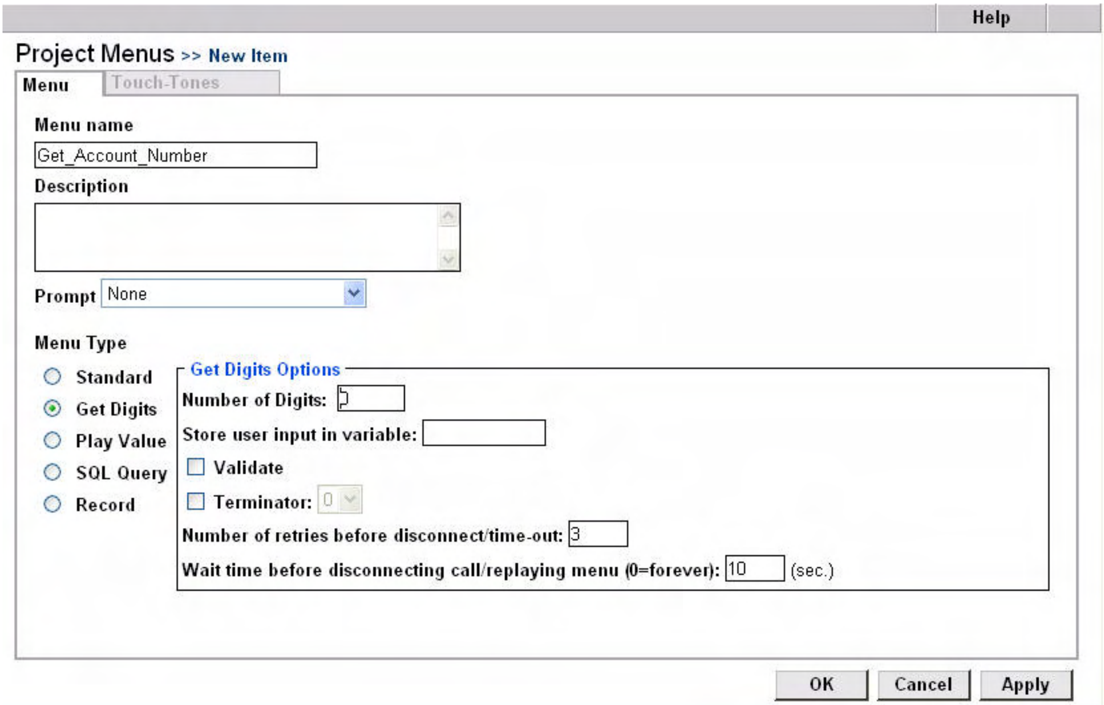


Figure 8-2 Get Digits Menu - Store User Input in Variable Field

2. In the **Store user input in variable** field, enter a variable with the following requirements:

   a. All variable names must begin with a dollar (**$**) character. For example:

```
$custPhone
$projectName
```

b. Variable names are ***case sensitive***. For example, $custPhone is not the same variable as $CustPhone.

c. **Variable Types**:

   i. Variables can be handled as either ***integers*** or ***strings***.

   ii. For CCA to treat a variable as a string, you must wrap it in single quotes.

   For example, CCA treats `'$AccNum'` as string and `$AccNum` as an integer.

d. **Variable Scope**:

   i. The scope of a user-defined variable is the interaction. When CCA creates a user-defined variable during a call, the variable continues to exist for the life of the call. When the call ends, CCA erases the variable from memory.

   ii. CCA can share user-defined variable among menus, but only for the same interaction.

   Example: If CCA routes a call from one menu to another, a variable created in the first menu is available to the second menu.

   Example: Two calls reach the call center at the same time. CCA routes both calls to a project menu that creates a variable called ***$Account_Number***. Since there are two interactions, CCA keeps the value of $Account_Number for the first call completely separate from the value of $Account_Number for the second call.

e. **Length of a Variable Name**:

   Theoretically, variable names can be any length, but because they can be passed between data systems, TAW recommends keeping variable names reasonably short. For example, when including variables in SQL queries, know that databases vary on the maximum allowable length of a query.

System-Defined Variables

In addition to creating user-defined variables, there are also many system-defined variables in which CCA automatically sets the value.

Table 8-3 shows the available system-defined variables and their descriptions.

Table 8-3. System-Defined Variables and Descriptions

System Variables	Description
$ACD_PRIORITY	Initially, CCA sets this variable to the priority of the project (Options > Projects > Phone tab > Priority drop-down menu).
	After enabling Customer Priority Routing (Options > Projects > Phone tab > Options subtab > Enable Customer Priority Routing check box), CCA can change the value of this variable to the customer priority. See "Assigning Priority Levels to Customers" on page 12-1.
$ANI	The current incoming phone number.
$CID	If the project prompts the customer for a customer ID (Options > Projects > Phone tab > "Use Prompt to Ask for Customer ID" check box), CCA stores the value the customer enters in the $CID variable. If the project does not enable the "Use Prompt to Ask for Customer ID" check box, the $CID variable remain empty.
$CONVERTDATE	This is a special system variable for converting a date (in the format YYYYMMDD) to a POSIX style format (number of seconds since January 1st, 1970). For example: To convert the date "19900505" (May 5th, 1990) to the POSIX value for that date, enter the following (in any project menu location where you can set a variable): $CONVERTDATE = 19900505 The next time CCA access the value of $CONVERTDATE, it contains the POSIX equivalent of May 5th, 1990.
$CURRENTTIME	Stores the current time (in the format HHMM).
$DATE	The current POSIX time in seconds (number of seconds since January 1st, 1970).

Table 8-3. System-Defined Variables and Descriptions

System Variables	Description
$DAYOFWEEK	The day of the week (where 1 = Sunday, 2 = Monday,…, 7 = Saturday).
$DNIS	The phone number the caller dialed.
$HOURS	The hours part of the time when the current interaction began.
$INTDATE	The date when the current interaction began. $INTDATE uses a POSIX time stamp format (the number of seconds since Midnight, January 1, 1970, UTC/GMT).
$INTID	The ID of the current interaction.
$MINUTES	The minutes part of the time when the current interaction began.
$PREDCID	The Predictive Contact ID of the current predictive call.
$SECONDS	The seconds part of the time when the current interaction began.
$SQLSTATUS	The status of the last query executed from a SQL Query Project Menu. Possible values are: FAIL NOROWS PENDING SUCCESS See “Creating SQL Query Menus” on page 8-35.
$TODAYSDATE	Stores the current date (in the format: YYYYMMDD).

Operators

Use numeric and string operators to manipulate variables in a Project Menu.

Numeric and String Operators

Use numeric and string operators in any menu location **except** the **Case** tab (described in “The Case Tab” on page 8-23). Table 8-4 provides numeric operators and their descriptions.

Table 8-4. Numeric Operators and Descriptions

Numeric Operators	Description
+	Add values.
-	Subtract values.
*	Multiply values.
/	Divide values.

Table 8-5 provides string operators and their descriptions.

Table 8-5. String Operators and Descriptions

String Operators	Description
+	Concatenate strings.

Comparison Operators

Use comparison operators (also called ***logical*** or ***test*** operators) to test conditions, such as: “is variable A equal to variable B?”

- One of the most common errors is to confuse the assignment operator “=” with the comparison operator “==”. They are similar looking, but have completely different meanings. See Table 8-6 for a comparison.

Table 8-6. Example Comparing an Assignment Operator and a Comparison Operator

Operator	Meaning
$Balance = 5	**Assign** the variable “$Balance” the value of 5.
$Balance==5	**Compare** the value of $Balance to 5. This is similar to asking the question: is the value of $Balance equal to 5?

Table 8-7 shows several comparison operators and provides a description for each.

Table 8-7. Comparison Operators and Descriptions

Comparison Operators	Description
==	Equal to
!=	Not equal
>	Greater than
<	Less than

Creating Standard Menus

Standard menus allow callers to navigate the call center by pressing keys on their phone. Standard menus also allow routing callers based on predefined decisions.

A standard menu has three parts:

1. A prompt (recorded message) describes the valid touch-tone menu choices.
2. The tones the customer can enter.
3. The CCA response to each valid tone.

A standard menu can route calls to many destinations, including:

- A workgroup for handling by the next available agent.
- A specific agent.
- A company directory based on agent last names.
- Other menus with additional options.

To create a Standard Menu

1. Click **Options** > **Project Menus** > **Add** button.

   The Add Project Menus screen (Figure 8-3) opens to the Menus tab.

2. In the **Menu** tab, make sure to select **Standard**.

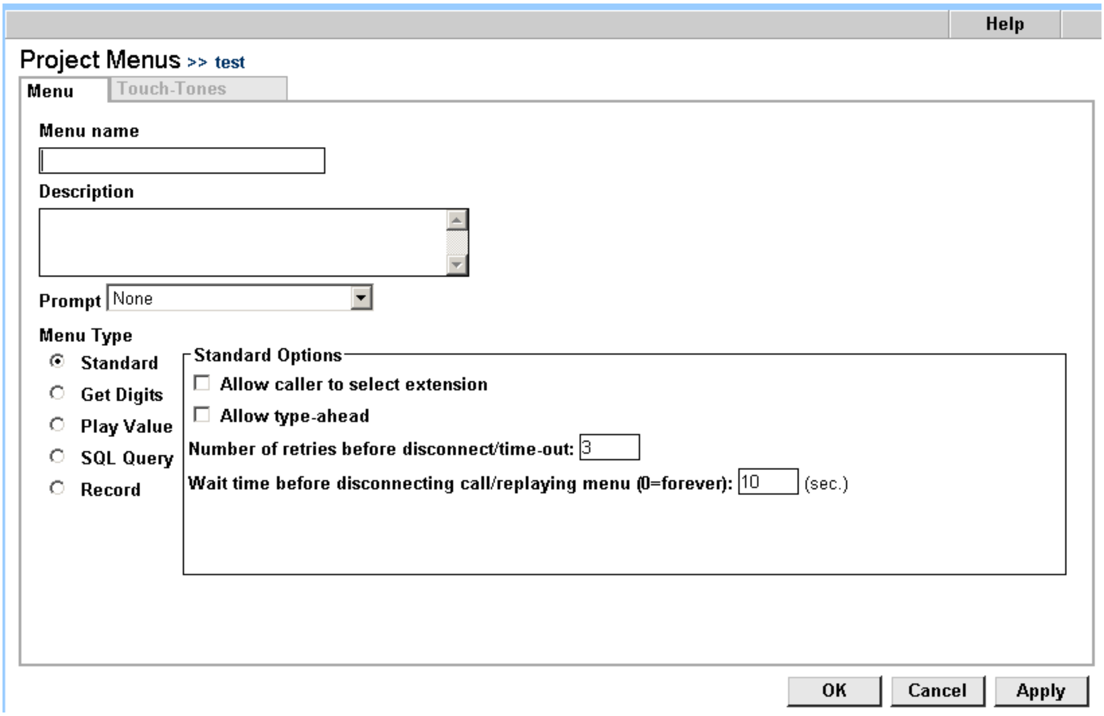


Figure 8-3 Add Project Menus - Select Standard

3. Use Table 8-8 to complete the fields.

Table 8-8. Add Project Menus Fields and Descriptions

Field	Description
Menu Name	Type a name for the menu.
Description	Type a description for the menu. (Describe the menu's function or purpose.)

Table 8-8. Add Project Menus Fields and Descriptions

Field	Description
Prompt	From the drop-down menu, select the prompt that describes the options offered in this menu. If the correct prompt does not appear, record it and add it to the Prompt Library. (See "Creating a Custom Prompt" on page 5-3.)
Allow caller to select extension	Check to allow the caller to enter an agent's extension. For the customer to enter an agent's extension without listening to the entire menu, also check the Allow Type-ahead check box (see next field).
Allow type-ahead	Check to allow the caller to choose menu options before the prompt completes playing.
Number of retries before disconnect/timeout	Type the number of times to play the menu before disconnecting the caller or jumping to the Timeout Action button (see next field).
Wait Time before replaying menu	Type the number of seconds to wait before replaying the menu, if the caller does not make a choice.

4. Click the **Touch-Tones** tab (Figure 8-4) to associate a customer key-press with a routing action.

   a. Select one of the buttons on the left side of the tab (such as buttons 1-9, "*", "#", and so on).

   b. Then, select one of the radio buttons on the right side of the tab.

      For example, click button **9** (on the left side), then click the **Disconnect** button on the right side. Then, if the user presses 9 on their phone, they are disconnected.

   c. Click the **Timeout Action** button to specify an action to take if the caller doesn't make a choice from the menu.

   d. CCA takes the Timeout Action after the menu repeats a specific number of times. (See the "Number of retries before disconnect/timeout" field in Table 8-8.)

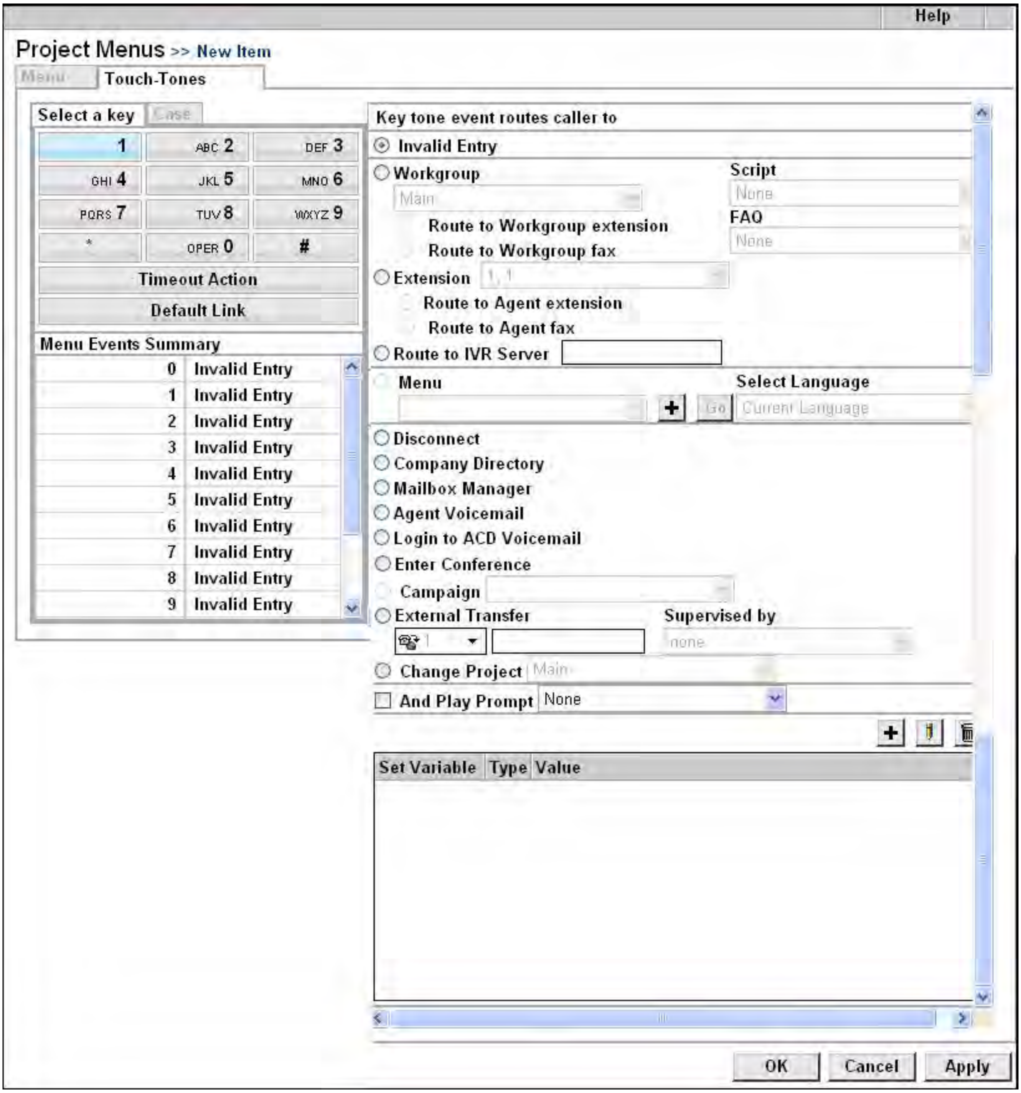


Figure 8-4 Add Project Menus - Touch-Tones Tab

5. Click the **Default Link** button to take an action (after a prompt, if any, plays) without giving the caller an opportunity to select from a menu.

6. Use the information in Table 8-9 to set actions for all of the allowed key presses.

The action you select occurs as soon as the caller reaches this menu.

Table 8-9. Tone/Event Routs Caller Selection and Description

Tone/Event Routes Caller to	Description
Invalid Entry	Click to play the System Prompt `invalid.wav` ("Invalid Entry").
Workgroup	Click to route the caller to the workgroup specified in the drop-down menu. Then, click either: **Route to Workgroup extension**: Transfers the call to the best available agent. If no agent is available, CCA places the caller in a queue. **Route to Workgroup Fax**: In this case, the customer is waiting to send a fax to the call center. The menu prompt may say something like: "Press 3 to send a fax." Now, when the user presses **3** (for example), the customer hears the fax tone and can send a fax. CCA routes the fax to the best available agent. If no agent is available, CCA puts the fax into a queue. Now, when an agent accepts the fax interaction, the agent receives an email with the fax as a TIFF attachment.
Script	From the drop-down menu, choose a script to display to the agent when CCA routes the call to them. (See "Creating a URL Library" on page 4-4.)
FAQ	From the drop-down menu, choose an FAQ to display to the agent when CCA routes the call to them. (See "Creating a URL Library" on page 4-4.)

Table 8-9. Tone/Event Routs Caller Selection and Description

Tone/Event Routes Caller to	Description
Extension	Click to route the caller to the agent specified in the drop-down box. Then, click either: **Route to Agent Extension** to route a voice call to the agent, or **Route to Agent Fax** to route a fax interaction to the agent. In this case, the customer sends a fax to a specific agent. The selected agent immediately receives an email, with the fax as a TIFF attachment.
Route to IVR Server	Click to transfer the caller to a custom Interactive Voice Response system. Type the name of the IVR Server in the adjacent text box. **Note**: This option appears only when CCA is configured to support a custom IVR Server.
Menu	Check to transfer the caller to another project menu, select a project menu (from the drop-down list), and select a language (from the Select Language drop-down list). **Note**: If routing the customer to a menu in the same language as the previous menu, choose **Current Language** from the Select Language drop-down menu. If routing the customer to a menu in a different language, choose that language from the Select Language drop-down menu.
+	Click the plus (**+**) button to quickly add a new project menu without leaving the Touch-Tones tab. 1. Click the plus (**+**) icon. A message box appears. 2. In the **Menu Name** text box, type the name of a new project menu and click the **Add** button. AM creates a new project menu. CCA automatically selects the new project menu in the Menu list box and gives it the following default values: • Prompt = None • Menu Type = Standard • Number of Retries Before Disconnect = 3 • Wait Time Before Disconnecting = 10 seconds

Table 8-9. Tone/Event Routs Caller Selection and Description

Tone/Event Routes Caller to	Description
	**Save your changes** and then click the **Go** button to quickly switch from one project menu to another. 1. Select a menu from the **Menu** drop-down menu. 2. Click the **Go** button. A confirmation message appears. 3. Click **OK**. AM then: • Closes the current Project Menu. • Opens the Project Menu you select.
Disconnect	Click to disconnect the caller.
Company Directory	Click to play the prompt `entername.wav` ("Please enter the last name of the person you wish to reach using your touch-tone telephone keypad...") and allow the caller to navigate to an agent by pressing the first three letters of the agent's last name.
Mailbox Manager	Click to play the prompt `entermailbox.wav` ("Please enter your mailbox number, followed by the pound key") and allow call center agents to access their non-ACD voicemail messages from a remote telephone and to set up their voicemail greetings. **Notes**: • For agents to access the Mailbox Manager remotely: • The agent's username and password (Options > Agents > Profile) must consist only of numbers. For example, the agent's username could be "1234" and their password could be "5678." • A POP3 Server must be configured for the agent (Options > Agents > Email > Defined POP3 Server). • The project must use a Project Menu (phone menu) and the phone menu must have a touch-tone key that routes to the Mailbox Manager radio button. • You can also allow users to access their **ACD** voicemail messages. See "Login to ACD Voicemail" on page 8-17. • To stop customers from accessing the Mailbox Manager feature, leave it out of the recorded prompt. Tell agents that they can enter a key to access their voicemail messages and that the feature is not described as an option in the recorded prompt.

Table 8-9. Tone/Event Routs Caller Selection and Description

Tone/Event Routes Caller to	Description
Agent Voicemail	Click this button only when creating a menu that plays before CCA routes the customer to an agent's voicemail. **For Example:** 1. The customer calls a phone number associated with a project (Projects > Phone > Project Phone Number). 2. CCA routes the customer to an agent, but the agent is not available. CCA then routes the customer to the agent's voicemail. 3. Before the customer leaves a voicemail, CCA plays a menu (Projects > Phone > Options subtab > Menu Played Before Voicemail). 4. One of the key presses in the menu allows the customer to leave a voicemail for the agent they are trying to reach. (Phone Menus > Touch-Tones > Agent Voicemail). If you use the Agent Voicemail radio button in a menu that CCA does not play for a customer before they leave a voicemail, CCA will not know which agent voicemail to use.
Login to ACD Voicemail	Click this option so users can dial into the system and retrieve their ACD Voicemail. • Users dial the number you provide. • The project menu routes the user to the "Login to ACD Voicemail" option. • CCA plays a prompt giving the users several options, one of which is to listen to their ACD voicemails. **Notes**: • Use this option for users who want to retrieve their ACD voicemails from a phone. (The user is typically not logged into IM.) • The agent's username and password (Options > Agents > Profile) must consist only of numbers. For example, the agent's username could be "1234" and their password could be "5678." • You can also allow users to access their **non-ACD** voicemail messages. See "Mailbox Manager" on page 8-16.

Table 8-9. Tone/Event Routs Caller Selection and Description

Tone/Event Routes Caller to	Description
Campaign	Click this feature to route a call to a Campaign and then select a campaign from the drop-down menu. (See Campaigns in chapter "Campaigns" on page 9-1.)
External Transfer	Click to transfer the call to the specified external (not an internal extension) phone number. From the drop-down menu, select the country. Type the phone number in the adjacent box. **Note**: CCA does not track calls transferred to an external number and the call will not appear in reports.
Supervised by	From the drop-down menu, select a supervisor CCA will automatically call when an agent or a menu makes an external transfer. **Note**: CCA calls the supervisor and joins to a conference only if the supervisor's phone in on hook. If the supervisor is not available (or not on hook), you can control the call manually, using Hang Up, Join, or CRM.
Change Project	Click to route the caller to the specified project. From the drop-down menu, select the project.
And Play Prompt	Click and then, from the drop-down menu, select a prompt to play CCA takes a routing action. For example, if you selected the "Change Project" button, use the "And Play Prompt" to tell users "I'm transferring you to the sales group" before CCA routes the call.
Set Variable	Use the Set Variable control to do the following before CCA takes a routing action: 1. Create variables. 2. Set the value of new and existing variables. 3. Test the value of variables.

7. Click **OK**.

To use the Set Variable Control

Use the Set Variable Control to create variables, assign values to variables, and test variables.

- Create as many “entries” as you want in the Set Variable control. CCA makes all of the assignments and tests before taking any routing action.
- Use all operators in the Set Variable control (string, numeric, and comparison). See page 8-8.
- Create equations and do math operations using new variables, existing variables, and system variables.

Example 1: Create a variable and set its value to 5

1. Click the **+** (plus) icon.
2. In the Set Variable dialog box (Figure 8-5):
   a. In the Variable Name text box, type **$tmp**.
   b. Click the **Value** button.
   c. In the Value text box, type **5**.
   d. Click **OK**.

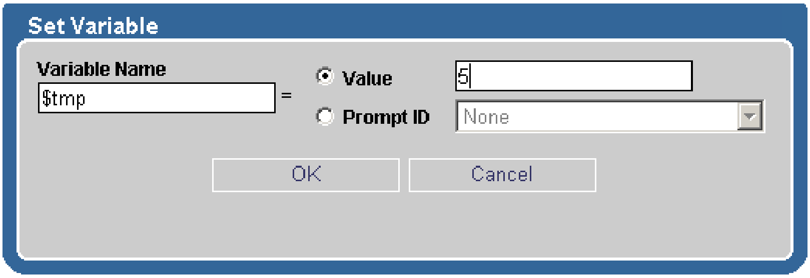


Figure 8-5 Example 1: Set Variable

3. Follow the same steps to assign a string value to the variable **$tmp**.

Example 2: Increment a pre-existing variable

In this example, assume that a pre-existing integer variable (**$tmp**) was created in some other menu.

1. Click the **+** (plus) icon.

2. In the Set Variable dialog box (Figure 8-6):

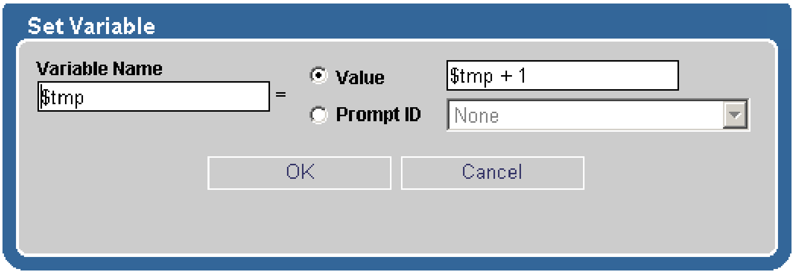


Figure 8-6 Example 2: Increment a Pre-Existing Variable

a. In the Variable Name text box, type **$tmp**.

b. Click the **Value** button.

c. In the Value text box, enter **$tmp + 1**.

d. Click **OK**.

Example 3: Assign a Company Prompt ID to a variable

In some situations (such as when constructing a menu system), it is convenient to store the ID number of a company prompt in a variable. After the ID of a company prompt is in a variable, route CCA to a Play Value menu and play the prompt to the caller.

You cannot store the ID of a System Prompt in a variable.

In this example, assume that a company prompt called “Invalid Entry” already exists.

1. In the Set Variable control, click the **+** (plus) icon.

2. In the Set Variable dialog box (Figure 8-7):

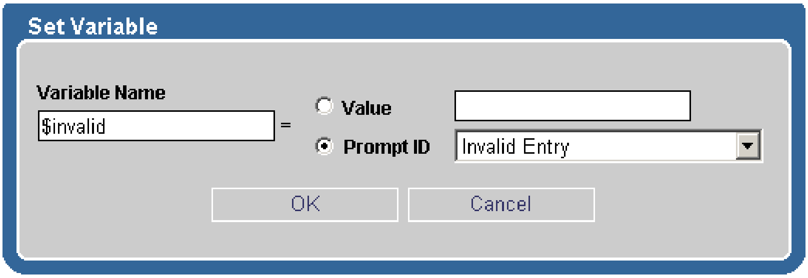


Figure 8-7 Example 3: Assign a Company Prompt ID to a Variable

a. In the Variable Name text box, type **$invalid**.

b. Click the **Play Prompt** radio button.

c. Select **Invalid Entry** from the Play Prompt list box.

d. Click **OK**.

After assigning the ID of a company prompt to a variable, play the prompt to a caller by routing CCA to a Play Value menu and entering the variable (**$invalid**) in the Add Play Value dialog box (Figure 8-8).

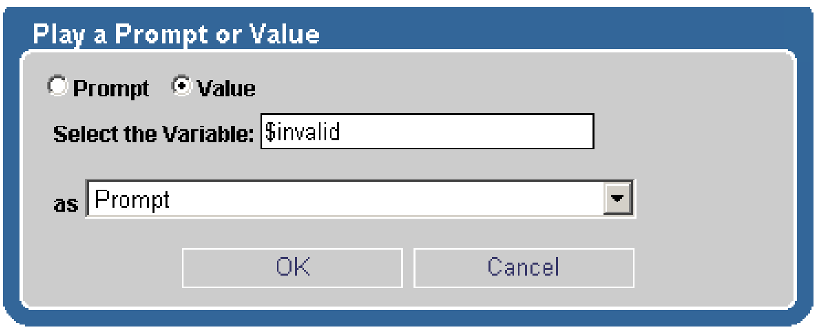


Figure 8-8 Play a Prompt or Value

Example: Routing the Customer to a Menu in a Different Language

In this example, customers reaching the call center hear a prompt allowing them to continue in English or Spanish.

If the customer chooses to continue in English, CCA routes the customer to an English-speaking workgroup.

If the customer chooses to continue in Spanish, CCA routes the customer to an Spanish-speaking Workgroup.

1. Create a Spanish-speaking workgroup and an English-speaking workgroup.

2. Create a company prompt that plays “Press 1 for English. Seleccionar dos para Espanol.”

3. Create a Spanish Project Menu:

    a. In the **Menu** tab, click the **Standard** button.

    b. In the **Touch Tone** tab:

        i. Click the **Default Link** button.

        ii. Then, click the **Workgroup** button.

        iii. From the drop-down menu, select the **Spanish Workgroup**.

    Now, when CCA routes any customer to your Spanish menu, CCA immediately transfers the customer to the Spanish workgroup.

4. Create an English menu:

    a. In the **Menu** tab:

        i. From the **Prompt** drop-down menu, select the company prompt.

        ii. Click the **Standard** button.

    b. In the **Touch Tone** tab:

        i. Click button **1**, click the **Workgroup** button, and select **English Workgroup** from the drop-down box. (Now, when a customer presses 1, CCA immediately transfers the customer to the English Workgroup.)

        ii. Click button **2**, click the **Menu** button, and select the Spanish Menu from the drop-down menu.

        iii. From the Select Language drop-down menu, select **Spanish**. (Now, when a customer presses **2**, CCA immediately transfers the customer to the Spanish

Workgroup. All further prompts that the customer hears are in Spanish.

5. Create a project and route phone calls to an English Menu.

   a. Select **Options** > **Projects** > **Phone** tab.

   b. Click the **Menu** button.

   c. Then, from the drop-down menu, select **English**.

   CCA routes callers to the project to the English menu. The English menu provides the choice of continuing in English or Spanish.

When routing callers to a menu in another language, make sure to record **System Prompts** for all **Project Options** and all **Workgroup Options** in that language.

After selecting a menu in a specific language, and no prompts exist in that language, callers hear silence when they reach the menu. (See “Creating a Custom Prompt” on page 5-3 for information on creating prompts.)

The Case Tab

Use the **Touch-Tones** tab identify a routing action after a customer presses a key on their phone. Use the **Case** sub-tab to identify a routing action based on the value of one or more variables.

If (condition) then (take a routing action)

The Case tab is named after the case (or “switch”) statement that is common to many programming languages. However, in AM, this tab works more like an “If ... Then ... Else...” statement.

Access to variables:

The Case tab allows access to all system variables (see “System-Defined Variables” on page 8-6) and all user-defined variables for the current interaction (see “d.Variable Scope:” on page 8-6.)

Number of conditions:

Create as many conditions/tests as desired. CCA executes the first true condition.

Default routing action:

Create a default routing action (using the **Other** button). CCA takes this routing action if none of the conditions are true.

If your condition requires time, such as comparing an entry to a third-party database (as in locating a social security number), then it is best to play a prompt while the search is being performed. (If you immediately route the call, the query may not have time to finish and, therefore, would result in incorrect routing.) The prompt provides additional time between the search and the final call routing based on the search results.

To play a prompt, create a default routing action to go back to the menu, where you can then identify the prompt to play.

Use of operators:

Use **only** the comparison (logical) operators for the conditions you create. See “Comparison Operators” on page 8-9.

Do not use any of the numeric or string operators in the Case tab. CCA does **not** use the Case tab for arithmetic operations like:

```
$variable1 * $variable2
```

or for setting the value of a variable:

```
$variable1 = 5
```

CCA uses the Case tab only for **testing** or **comparing** values:

Is today Sunday?
`$DAYOFWEEK == 1`
($DAYOFWEEK is a system variable)

Is the customer balance less than then minimum balance?
`$cust_balance < $min_balance`
($cust_balance and $min_balance are examples of user defined variables)

To use the Case tab

1. Click **Options** > **Project Menus** > **Add** button > **Touch-Tones** tab > **Case** tab.

   The Case tab screen (Figure 8-9) appears.

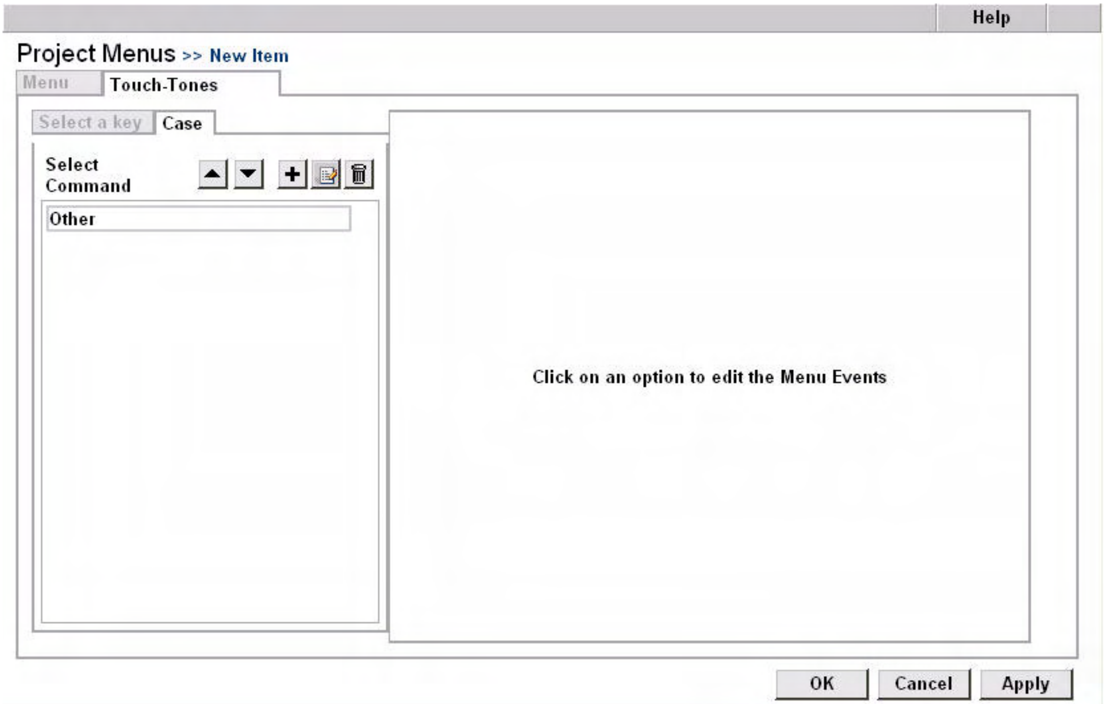


Figure 8-9 Case Tab

2. Click the **+** (plus) icon to add condition/test. A dialog box (Figure 8-10) appears.

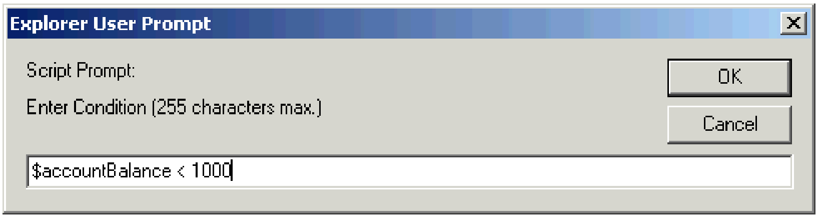


Figure 8-10 Use Case Tab

3. Type the condition and click the **OK** button. The screen refreshes (Figure 8-11) showing additional options.

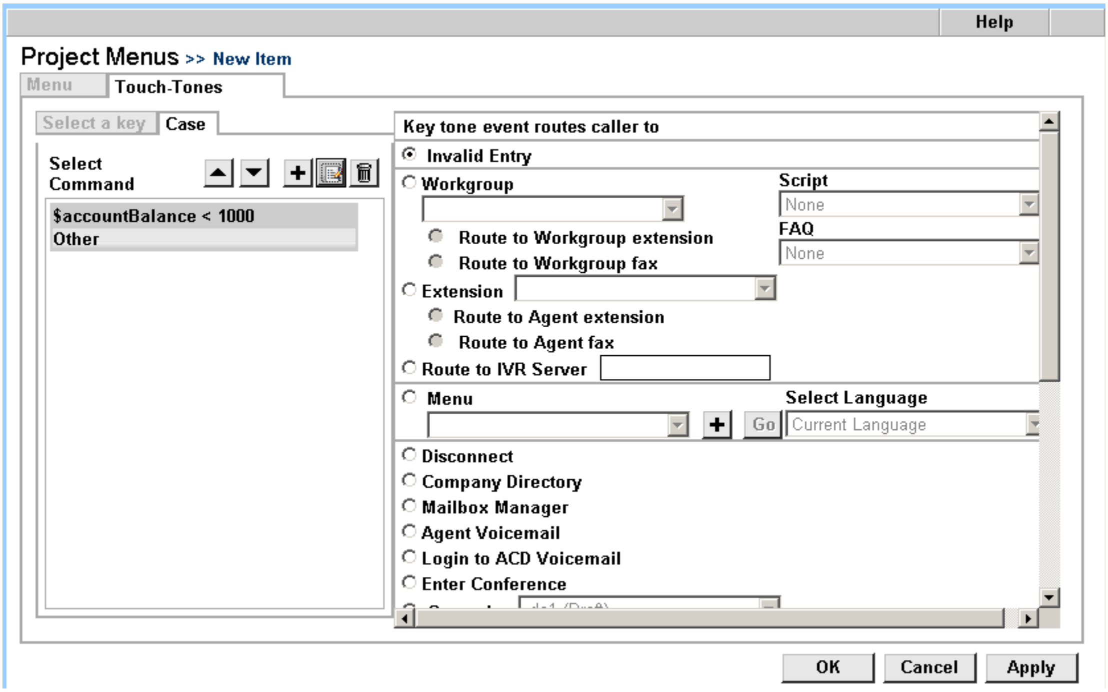


Figure 8-11 Routing Action to Take When True

4. On the right side of the screen, select a routing action for CCA to take when this condition is true.

   In this example, we created a condition/test that checks the customer's account balance. The variable **$acccountBalance** was created and the value was set in some other menu.

First, we created the condition/test **$accountBalance < 1000**. Then, we selected a routing action for that condition. When the customer's account balance is less than $1000.00, CCA routes the call to a menu called "Balance Too Low." This menu might simply tell the customer that their balance is below $1000.00 and that they will be charged a service fee.

5. Repeat the previous two steps until you finish adding all of the conditions and routing actions.

6. As an option, create a default routing condition to execute if none of the other conditions are true:

   a. Click the **Other** button.

   b. Then, from the right side of the screen, select a routing condition.

Creating Get Digits Menus

From a Get Digit menu, CCA can prompt the caller to enter a value, and then capture that value in a variable.

To create a Get Digits menu

1. Click **Options** > **Project Menus** > **Add** button. The Get Digits Menu screen (Figure 8-12) appears.

2. In the Menu tab, make sure to select the **Get Digits** button.

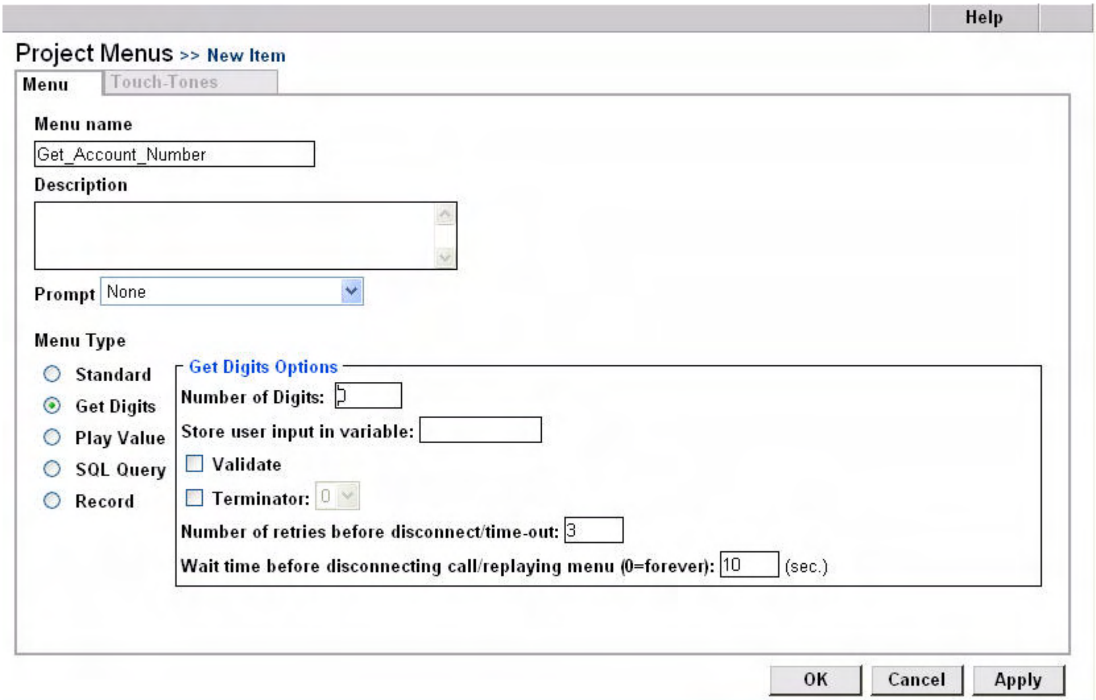


Figure 8-12 Get Digits - Menu Tab

3. Use the information in Table 8-10 to complete the fields.

Table 8-10. Get Digits Menu Tab Fields and Descriptions

Field	Description
Menu Name	Type a name for this menu.
Description	Type a description for this menu. (Such as the menu's function or purpose.)
Prompt	From the drop-down menu, select a prompt that describes the options offered in this menu. **Note**: If the correct prompt does not appear in the list, record it and add it to the Prompt Library. See "Creating a Custom Prompt" on page 5-3).
Number of Digits	Type the number of digits the caller must enter. **Note:** This includes any terminator the customer must enter. For example, "Enter your account number and then press the # key."
Store User Input in Variable	Type the variable name in which to store the digits that the caller enters. See "Using Variables in Menus" on page 8-4.
Validate	Check to have what the caller's enter read back to them to verify that it is correct. (The caller can select **1** for approval or **2** to re-enter the data.)
Terminator	Check to allow the caller to enter a terminating key. Then, from the drop-down menu, select a key from **0** to **9**, *****, or **#**. A terminating key is a way that the caller can tell the system "I have finished entering the information you asked for." For example, you might ask the caller to enter their account number and then press the "#" key as a terminator. A terminator is useful if the caller's information can be different lengths. For example, some account numbers are longer than others.
Number or retries before disconnect/time-out	Type the number of times CCA plays the menu prompt before disconnecting the call. (The default is 3 seconds.)

Table 8-10. Get Digits Menu Tab Fields and Descriptions

Field	Description
Wait time before replaying menu	Type the time (in seconds) for CCA to wait before replaying the menu prompt. (The default is 10 seconds.)

4. Create routing actions using either the **Touch-Tones** tab and/or the **Case** tab.

   a. For more about the Touch-Tones tab, see page 8-12.

   b. For more about the Case tab, see page 8-23.

5. Click **OK**.

Creating Play Value Menus

Using a Play Value menu, CCA plays a prompt to the caller or reads the contents of a variable to the caller.

To create a Play Value menu

1. Click **Options** > **Project Menus** > **Add** button.

   The Add Project Menu screen (Figure 8-13) appears.

2. In the **Menu** tab, make sure to select the **Play Value** button.

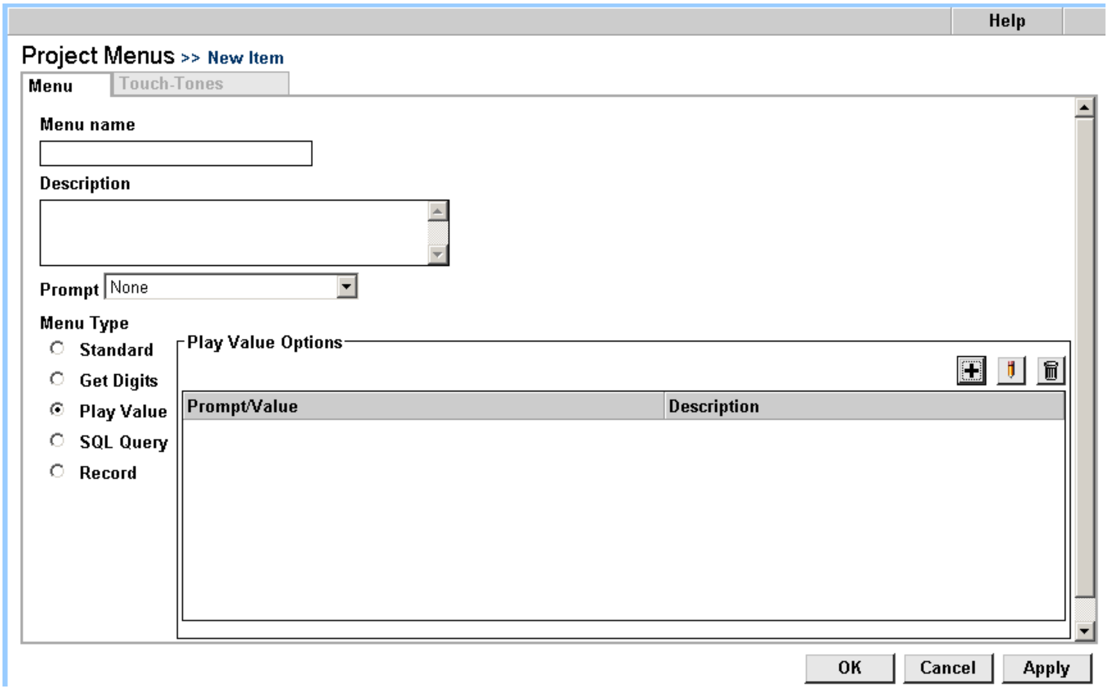


Figure 8-13 Play Value Menu

3. Using the information in Table 8-11, complete the fields.

Table 8-11. Play Value Menu Fields and Descriptions

Field	Description
Menu Name	Type a name for this menu.
Description	Type a description for this menu. (Such as the menu's function or purpose.).
Prompt	From the drop-down menu, select the prompt that describes the options offered in this menu. If the correct prompt does not appear in the list, record it and add it to the Prompt Library. (See "Creating a Custom Prompt" on page 5-3.)

4. Add the **Play Value Options:**

   a. In the Play Value options area, select the prompts or values CCA plays to the customer.

   b. Click the **+** (plus) icon. The Add Play Value dialog box (Figure 8-14) appears.

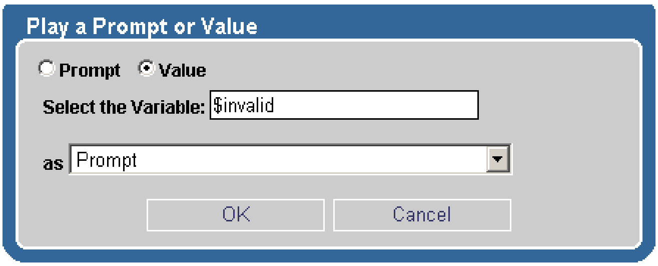


Figure 8-14 Add Play Value

   c. To play a prompt to the caller:

      i. Click the **Prompt** radio button

      ii. Then, from the Select Prompt drop-down menu, choose a prompt.

You can only play company prompts to callers. You cannot play system prompts. For information about creating company prompts, see page 4-16.

d. **To play a value** (the contents of a variable):

i. Click the **Value** button.

ii. In the Select the Variable text box, type the name of the variable CCA plays. (The variable was created and given a value in some other menu. Be aware of a variable's scope. See page 8-6.)

iii. From the As drop-down menu, choose the way CCA reads the value to the caller. Use the information in Table 8-12 when making your selection.

Table 8-12. Values and What CCA Reads

Value	CCA Reads
Currency	If the value of the variable is 12345, the caller hears "*One hundred twenty-three dollars and forty-five cents*."
Number	If the value of the variable is 12345, the caller hears "*Twelve thousand three hundred and forty-five*."
Spelling	If the value of the variable is 12345, the caller hears "*One, two, three, four, five*."
Date (yyyymmdd)	If the value of the variable is 20040710, the caller hears "*July 10, two-thousand and four.*" **Note**: CCA assumes that the variable is a date in the format yyyymmdd.
Date (seconds since 1970)	If the value of the variable is 20040710, the caller hears "*Aug 21, nineteen seventy.*" **Note**: CCA assumes the variable has a POSIX formatted date (number of seconds since 1970).
Date at Time	Same as above, but CCA also tells the caller the time.

Table 8-12. Values and What CCA Reads

Value	CCA Reads
Time (seconds since 1970)	If the value of your variable contains the POSIX equivalent of 10:35 AM, the caller hears “*Ten thirty-five, AM*.” **Note**: CCA assumes that the variable contains a POSIX time value.
Time (hhmm)	If the value of the variable is 1035, the caller hears “*Ten thirty-five, AM.*” **Note**: CCA assumes that the variable contains a time value in the 24-hour format (hhmm).
Prompt	CCA plays the prompt to the caller. **Note**: CCA assumes that the variable contains the ID of a company prompt. (See “Example 2: Increment a pre-existing variable” on page 8-19.)

CCA plays as many prompts or values to the caller as desired.

CCA only plays company prompts to callers. CCA cannot play system prompts. (See “Creating a Company Prompt Library” on page 4-16.)

5. Create your routing actions using either the **Touch-Tones** tab and/or the **Case** tab.

    a. For more about the Touch-Tones tab, see page 8-12.

    b. For more about the Case tab, see page 8-23.

6. Click **OK**.

Creating SQL Query Menus

Before creating an SQL Query menu, an ODBC System DSN entry for the database (to access) must exist. The DSN entry must exist on the machine where the CCA Statistics server is installed. See your Network Administrator for more information.

SQL Query menus allow CCA to run SQL statements against any SQL Server or Oracle database to retrieve or update data.

- Include both AM system variables and user-defined variables in the SQL queries. CCA substitutes the variables before passing the query to the database server.
- Capture the result table from an SQL query into a user-defined variable.
- You must capitalize all SQL keywords (SELECT, AS, FROM, WHERE, SET, and so on).
- The only table actions that you can perform from a SQL Query menu are SELECT, INSERT, and UPDATE.

To create an SQL Query menu

1. Click **Options** > **Project Menus** > **Add** button. The Project Menus screen (Figure 8-15) appears.
2. In the **Menu** tab, make sure to check the **SQL Query** button.

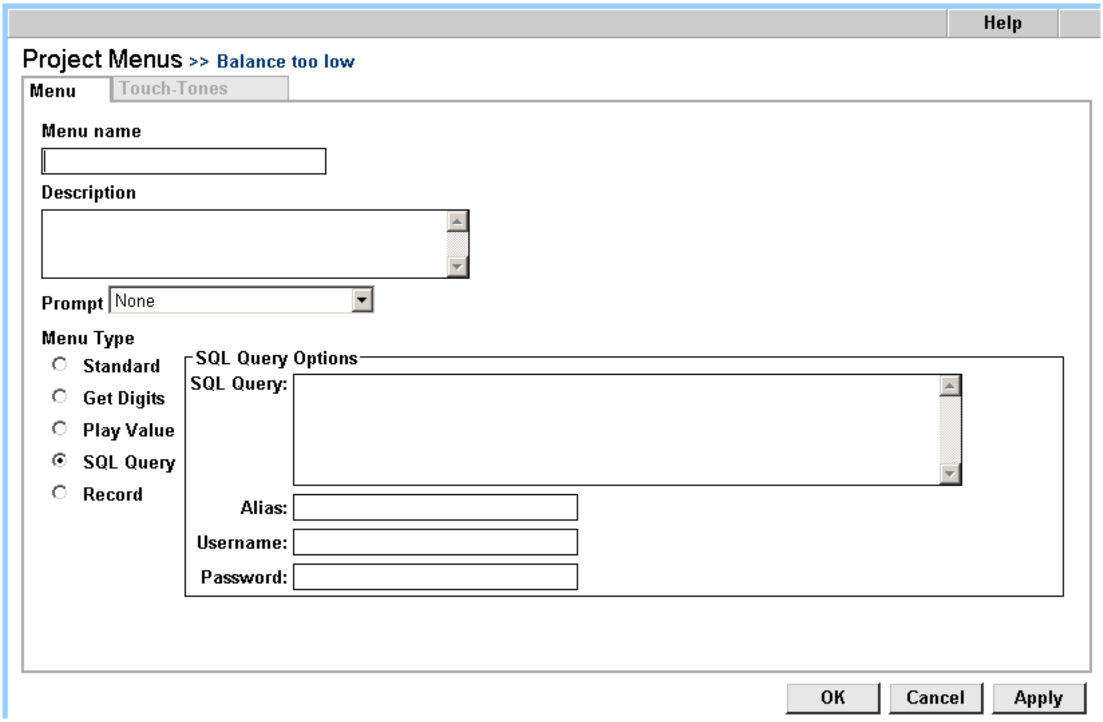


Figure 8-15 SQL Query Menu

3. Using the information in Table 8-13, complete the fields.

Table 8-13. SQL Query Menu Fields and Descriptions

Field	Description
Menu Name	Type a name for this menu.
Description	Type a description for this menu. (Describe the menu's function or purpose.)
Prompt	From the drop-down menu, select the prompt that describes the options offered in this menu. **Note**: If the correct prompt does not appear in the list, record it and add it to the Prompt Library. (See "Creating a Custom Prompt" on page 5-3.)
SQL Query	Type the SQL Query CCA runs. **Note:** Do not enter more than 1,900 characters.

Table 8-13. SQL Query Menu Fields and Descriptions

Field	Description
Alias	Type the data source name (from the Network Administrator).
Username	Type the data source username (from the Network Administrator).
Password	Type the data source password (from the Network Administrator).

4. Create routing actions using either the **Touch-Tones** tab and/or the **Case** tab.

   a. For more about the Touch-Tones tab, see page 8-12.

   b. For more about the Case tab, see page 8-23.

5. Click **OK**.

Example 1: Update a table

The following statement updates a customer’s status. CCA treats the value in the **$CustomerId** variable as a character string, since it is surrounded by single quotes.

```
UPDATE Customers SET CustStatus = $NewStatus
WHERE CustId = ‘$CustomerId’
```

Example 2: Result table with 1 row and 1 column

This statement returns the customer’s account balance in a variable called **$Balance**.

```
SELECT CustBalance AS $Balance FROM Customers
WHERE CustId = ‘$CustomerId’
```

Example 3: Result table with 1 row and multiple columns

Assume that the result table from the query has 1 row and multiple columns. For each column that to trap, provide a user-defined variable.

```
SELECT fname AS $fname, lname AS $lname FROM users
WHERE CustId = ‘$CustomerId’
```

Example 4: Result table with multiple rows and multiple columns

If the result table from the query has multiple rows and columns, provide variables for the first row only. AM automatically creates a set of variables for accessing the values in all of the other rows, using a pre-defined naming pattern.

For example, an SQL query returns the first and last names of 10 customers.

SELECT fname AS $fname, lname AS $lname FROM users
WHERE CustId <= 10

The result table looks like Table 8-14.

Table 8-14. Result Table

Rod	Beck
Adam	Eaton
Miguel	Ojeda
Ryan	Klesko
. . .	. . .

AM recognizes that the Result Table contains multiple rows and automatically creates a set of variables to access the data in each row, as shown in Table 8-15.

Table 8-15. CCA Automatically Creates Variables

	Variable			Variable
Rod	$fname_1		Beck	$lname_1
Adam	$fname_2		Eaton	$lname_2
Miguel	$fname_3		Ojeda	$lname_3
Ryan	$fname_4		Klesko	$lname_4
. . .	. . .		. . .	. . .

Notes:

- In the SQL query, provide variables names for the columns to trap ($fname, $lname, in our example) just as if the Result Table only had 1 row. AM does the rest.

- In this example, use $fname_1 and $lname_1 to reference the first and last name in the first row. Also use the variables $fname and $lname. This only applies to the first row of the Result Table. All other rows must use the $var_<number> format.

- Use the system variable ($NBROWS) to find the number of rows in the Result Table.

- If a loop to examine all rows in the result table exists, you can also see variables using the format:

  $variable_name@$index_variable

  In the example above, reference “Ryan Klesko” as:

  $index = 4
  $fname@$index (“Ryan”)
  $lname@$index (“Klesko”)

Creating Record Menus

Using a Record menu, you can record a customer phone interaction and review it later.

To create a Record menu

1. Click **Options** > **Project Menus** > **Add** button.

   The Project Menu screen (Figure 8-16) appears.

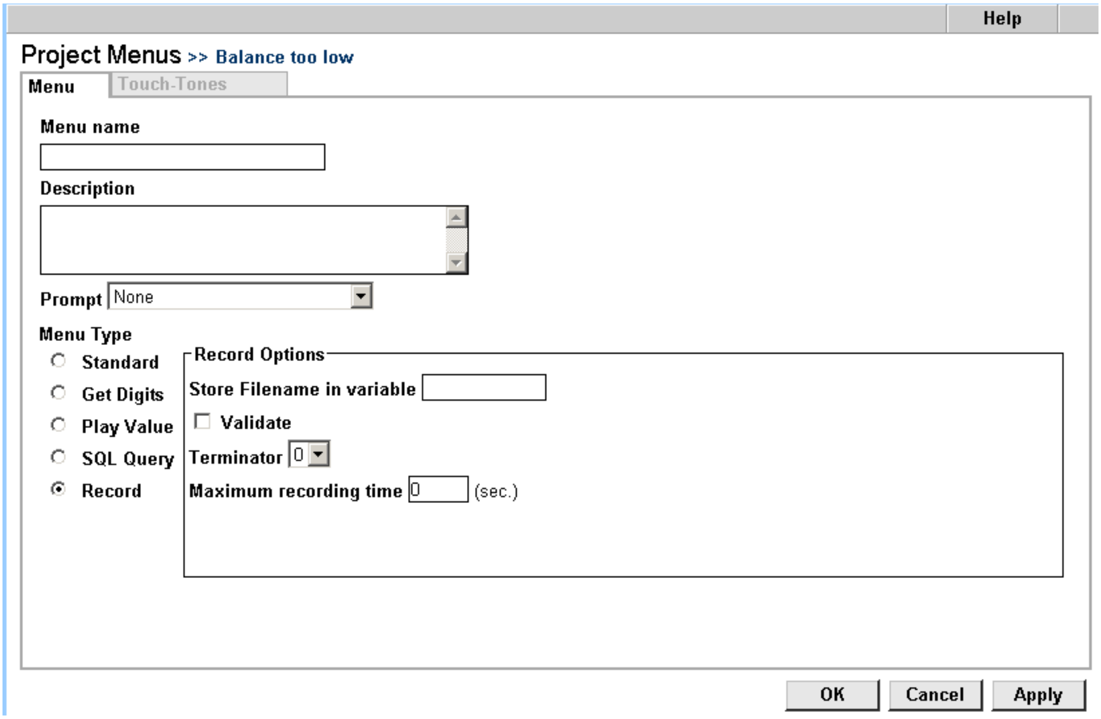


Figure 8-16 Record Menu

2. In the **Menu** tab, make sure to select the **Record**.

3. Using the information in Table 8-16, complete the fields.

Table 8-16. Record Fields and Descriptions

Field	Description
Menu Name	Type a name for this menu.
Description	Type a description for this menu. (Type the menu's function or purpose.)
Prompt	From the drop-down menu, select the prompt that describes the options offered in this menu. **Note**: If the correct prompt does not appear in the list, record it and add it to the Prompt Library. (See "Creating a Custom Prompt" on page 5-3.)
Store filename in variable	Enter a variable in this box to find the .wav file name, which CCA automatically generates. (When your Record menu captures a customer message, CCA stores the message in a .wav file on a CCA server.) **Example**: • Create a record menu to capture a customer's message. CCA stores the message in a .wav file with the generated name "412117512.wav." • In the "Store filename in variable" text box, enter **$RecordFileName.** • After CCA captures the customer's message, the value of the variable $RecordFileName becomes "412117512.wav." **Note**: Remember that the scope of a variable is the interaction. (See "Variable Scope" on page 8-6.)
Validate	If checked, CCA plays the recording back to the customer and provides the option to listen to the message, re-record the message, cancel the message, or save the message and continue.
Terminator	From the drop-down menu, select a terminator so that CCA asks the caller to press a button indicating they finished recording. **Note**: If no terminator exists, the recording continues until the caller hangs up or until CCA reaches the max recording length.

Table 8-16. Record Fields and Descriptions

Field	Description
Maximum recording time	Type the maximum time that CCA will continue recording.

4. Create routing actions using either the **Touch-Tones** tab and/or the **Case** tab.

   a. For more about the Touch-Tones tab, see page 8-12.

   b. For more about the Case tab, see page 8-23.

5. Click **OK**.

Listening to a Recorded Message

CCA provides two ways to listen to a message captured by a Record menu.

1. **Interaction Manager**:

   If a contact is assigned to the interaction (see the Interaction Manager's User Manual for information about assigning contacts), the recorded message appears as a link in the Interaction History for the contact.

2. **Supervision Manager**:

   Regardless of whether a contact is assigned to the interaction, the recording is always available through the Options > Interaction History screen in Supervision Manager.

Implementing Your Project Menu

After creating a Project Menu, route callers dialing in to the project to the menu. To do this, refer to “Adding Phone Interactions to a Project” on page 10-5.

Scheduling a Conference

Interaction Manager allows agents to put active calls in conference. For example:

- The agent accepts a call and puts the caller in conference,
- The agent accepts a second call and puts them in the conference.
- and so forth

The agent can keep accepting calls, putting them in conference, and then all of the callers can speak together. However, you can only have this type of conference when all callers reach the **same** agent, and the agent manually adds the calls to the conference.

CCA also has a *scheduled conference* feature. In a scheduled conference:

- Any user (netadmin, admin, sysadmin, supervisor, or agent) creates the scheduled conference, and then emails the date, time, phone number and conference password to anyone who wants to participate.

- At the appropriate time, people call the phone number, enter the conference password, and are added to the conference.

- None of the people in the conference need to be logged into AM, SM, or IM.

Creating the scheduled conference is easy - anyone can do it by starting Internet Explorer and connecting to a stand-alone Web page that comes with the CCA installation.

Before scheduling a conference, an administrator (Netadmin, Sysadmin, or Admin) must:

- Create a set of project menus to route callers to the conference.

- Tell the person scheduling the conference what number the participants should dial.

Setting Up Scheduled Conferences in Administration Manager

If you are not familiar with the process of creating project menus, read “Creating Project Menus” on page 8-1 before continuing.

The general process is to create three project menus:

1. **A Get Digits menu**: Prompts the caller to enter their conference password and then captures it in a variable.
2. **A SQL Query menu**: Verifies that the conference password is valid and determines if the conference is currently in progress.
3. **A Standard menu**: Tests and initializes a few variables, and then adds the caller to the conference.

To create the Project Menus for Scheduled Conferences

1. Create a custom prompt, such as: “**Please enter the conference password**.”
2. Click **Options** > **Project Menus** > the **Add** button. The Add Project Menus screen (Figure 8-17) appears.

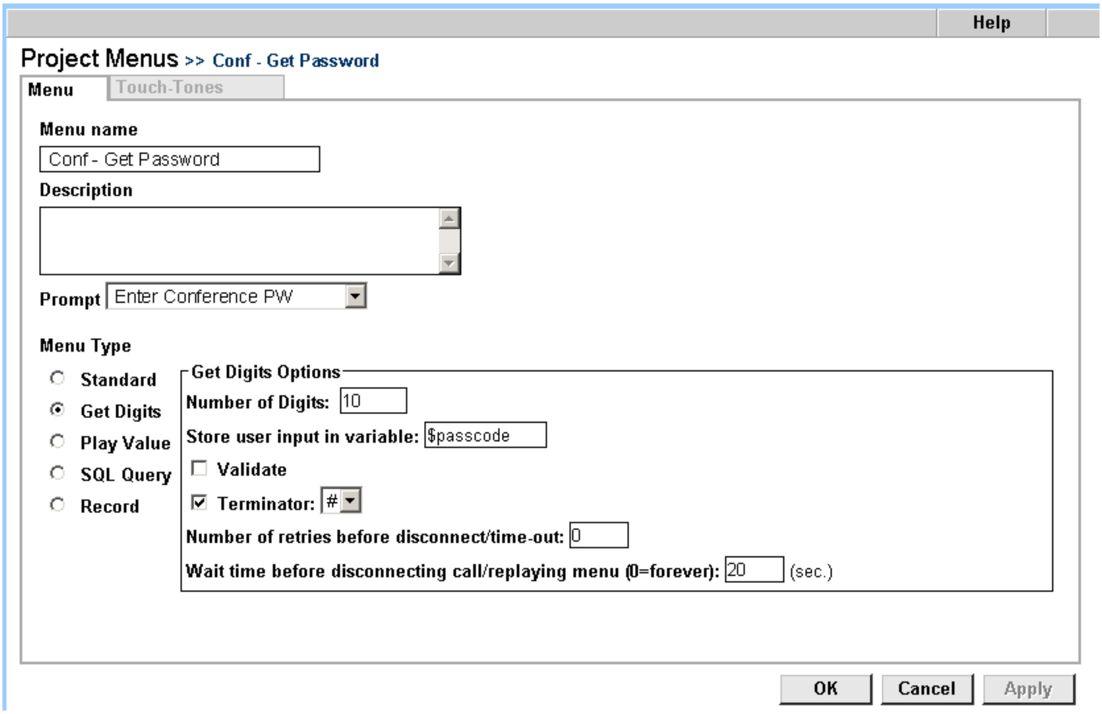


Figure 8-17 Project Menus

3. Create a Get Digits Project Menu:

   a. This menu traps the caller's conference password. Therefore, use menu name **Conf - Get Password**.

   b. In the Description box, type a description.

   c. From the Prompt drop-down menu, select the custom prompt you created in step a.

   d. Under Menu Type, click **Get Digits**.

   e. In the Get Digits Options box:

i. In the Number of Digits box, type **10**.

ii. In the Store User Input in Variable field, type a variable name. (The conference password the caller enters ends up in this variable.)

f. Click **OK**.

4. Select the **Touch-Tones** tab (Figure 8-18).

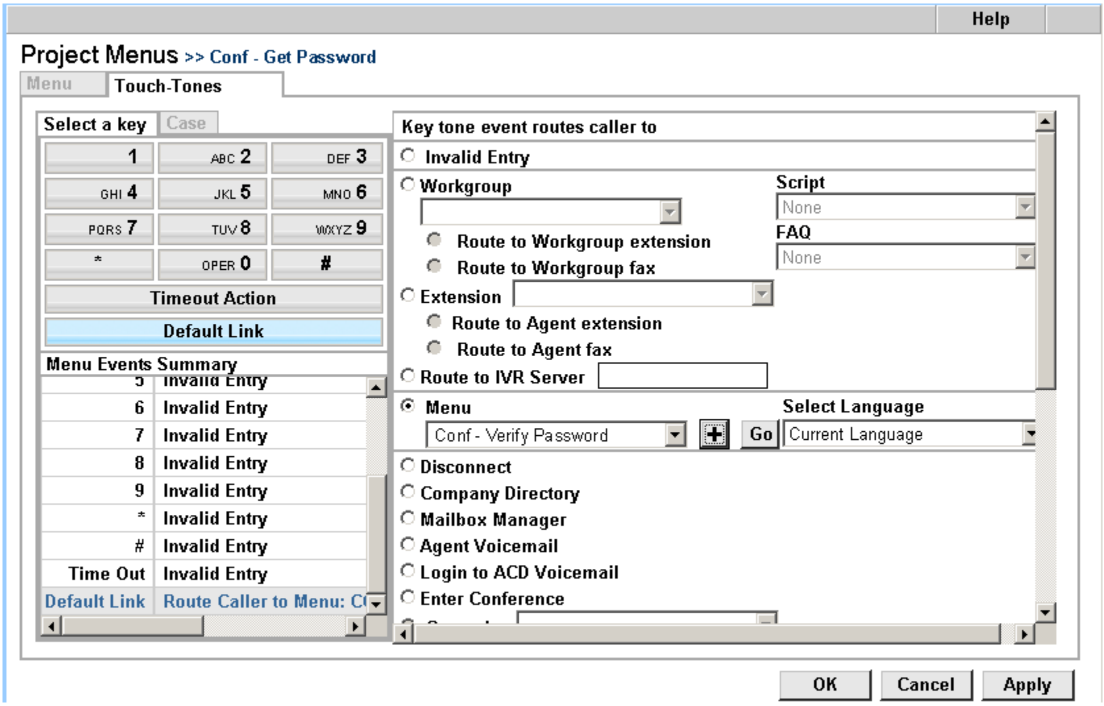


Figure 8-18 Touch-Tones Tab

a. In the left side of the screen, select the **Default Link** button.

b. In the right side of the screen, click the plus () icon and create a new menu called **Conf - Verify Password**.

c. Then, from the Menu drop-down box, select the menu you just created (**Conf - Verify Password**).

d. Click **OK**.

5. In the Project Menu main screen (Figure 8-19), edit the **Conf - Verify Password** menu.

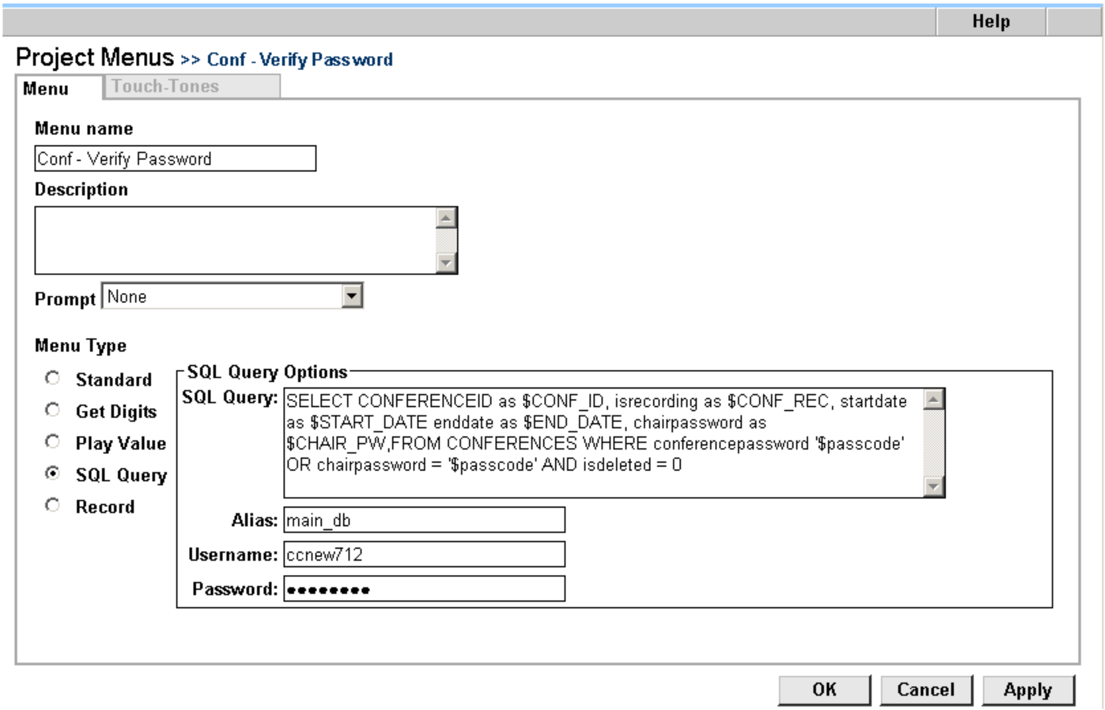


Figure 8-19 **Project Menu Main Screen**

In the previous menu, we asked the caller to enter their conference password and then trapped it in a variable.

In the "Conf - verify password" menu, we will verify that the caller's conference password is valid.

a. Set the Menu Type to **SQL Query**.

b. In the SQL Query text box, type the query shown in Figure 8-19:

```
SELECT CONFERENCEID as $CONF_ID,
isrecording as $CONF_REC,
startdate as $START_DATE
enddate as $END_DATE,
chairpassword as $CHAIR_PW,
FROM CONFERENCES
WHERE conferencepassword = '$passcode'
OR chairpassword = '$passcode'
AND isdeleted = 0
```

We use this query to find some information about the conference in the database. Almost all of the information we are interested in was added to the database when the CCA user created the scheduled conference.

Most of the $YADA variables shown above are custom variables we are creating to trap return values from the query. You can choose any names for these variables that you want, with **two exceptions**:

- You must use variables named $CONF_ID, and $CONF_REC.
- The system needs, and expects, to find variables with these names.

Table 8-17. Variables and Descriptions

Variable	Description
$CONF_ID	The conference ID is created when a user schedules a conference. We'll use this in a moment to verify that it's a valid ID. You must use a variable called "$CONF_ID" here. We'll explain why later in this section.
$CONF_REC	When a user creates a scheduled conference, they can click a check box to have the conference automatically recorded. If the conference will be recorded, $CONF_REC will equal 1. If the user did not select the record check box, $CONF_REC will be 0. You must use a variable called "$CONF_REC" here. We'll explain why later in this section.

Table 8-17. Variables and Descriptions

Variable	Description
$START_DATE $END_DATE	When a user creates a scheduled conference, they enter a starting day and time and an ending day and time for the conference. In the database, these are converted to a POSIX start conference timestamp and a POSIX end conference timestamp.
$CHAIR_PW	When you schedule a conference the stand alone web page generates two passwords: one for the "chairman" (the person who schedules the conference) and the other password for the participants. The only difference between the two passwords is that the system uses the chairman's password as a way of notifying the chairman that the conference will end soon.
$passcode	The conference password that the caller entered (and we trapped) in the previous Get Digits menu.

6. Select the **Touch-Tones** tab, then select the **Case** tab (Figure 8-20).

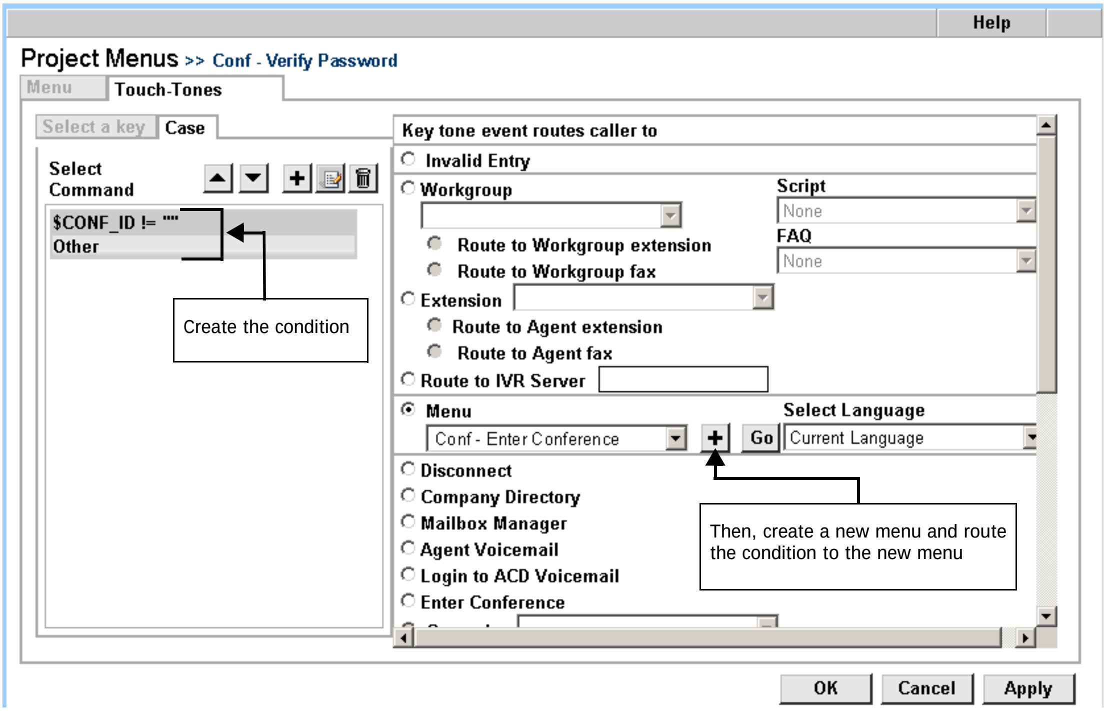


Figure 8-20 Case Tab

a. Use the Case tab to create a condition:

$CONF_ID != ""

Then select this condition and use the [+] icon in the right side of the screen to create another menu called "Conf - Enter Conference". Now we've set up a condition where if the conference ID is not a null string, we will route the caller to another menu for further processing.

b. Select the **Other** condition and route it to the **Disconnect** option. In a more realistic example, you might want to send the caller to a menu that tells them you can't find the conference password that they entered and give them a chance to enter it again.

c. Save your changes, then go back to the Project Menu main screen.

7. In the Project Menu main screen, edit the “Conf - Enter Conference” menu you just created.

In this menu, we’ll do a little more testing on some variables to make sure everything looks good, and then add the caller to the conference.

a. In the **Menu** tab, select Standard as the **Menu Type**.

b. Select the **Touch-Tones** tab, then select the **Case** tab.

c. In the Case tab (Figure 8-21), create the following conditions:

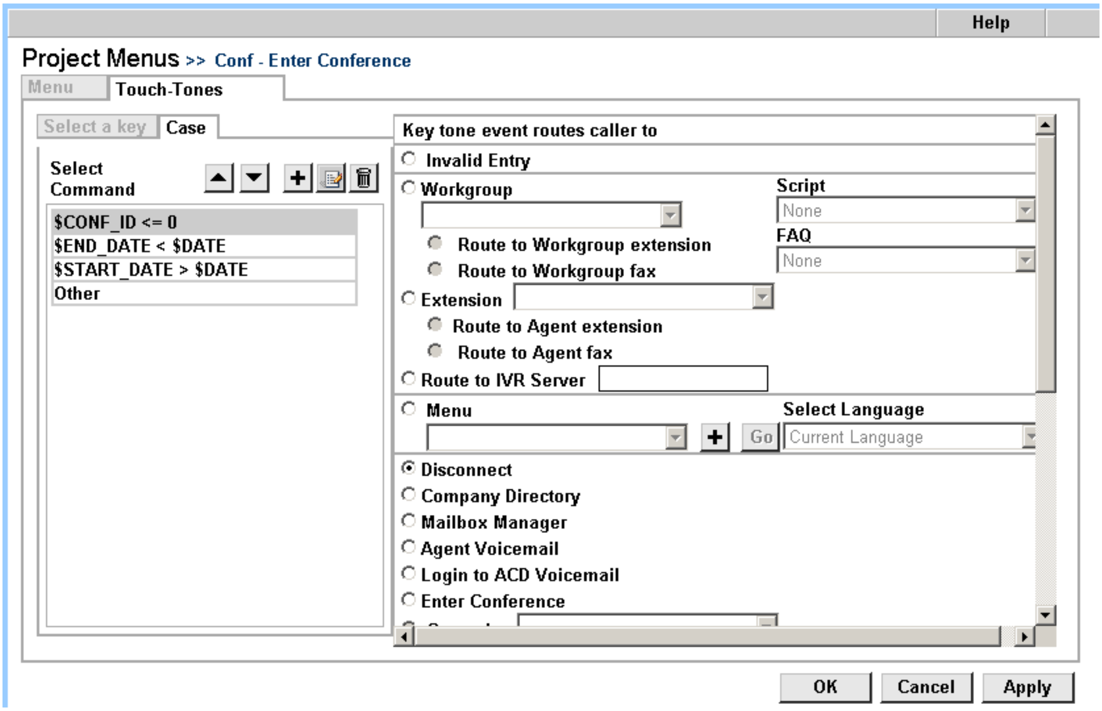


Figure 8-21 Case Tab

Refer to Table 8-18 for conditions.

Table 8-18. Cast Tab Conditions

Condition	Route To
$CONF_ID <= 0	In this example, if we determine that the conference ID is less than or equal to zero (invalid) we disconnect the call. In a more realistic example, you might want to send the caller to a menu that tells them you can't find the conference password that they entered and give them a chance to enter it again.
$END_DATE < $DATE	Here we are seeing if the conference end time ($END_DATE which we got from our SQL Query Project menu) is less than the timestamp of "now" (using the system variable $DATE). If it is, it means that the conference is over, so we will route the caller to the disconnect option or to some other menu to handle that case.
$START_DATE > $DATE	Here we are seeing if the conference start time ($START_DATE which we got from our SQL Query Project menu) is greater than the timestamp of "now" (using the system variable $DATE). If it is, it means that the conference hasn't started yet, so we will route the caller to the disconnect option or to some other menu to handle that case.
Other	If the caller reaches this condition then the conference ID is valid, and the conference is still in progress. To add the caller to the conference we need to do two things: • Select the **Other** condition and then select the **Enter Conference** routing option. • Use the Set Variable feature at the bottom of the screen to assign and test some important variables.

d. After routing the Other condition to the Enter Conference routing option, set up three special variables using the Set Variable feature. (Refer to "How to set these variables" on page 8-53.)

i. These variables must have the names $CONF_TIME, $CONF_SUP, and $CONF_NOTIFY.

ii. Setting $CONF_TIME to “$END_DATE - $DATE” tells the system how much time is left in the conference.

iii. $CONF_SUP tests the conference password that the caller entered against the chairman’s password. It tells us who in the conference is the chairman (the person who scheduled the conference). Before the conference ends, the system will play a wav file that only the chairman will hear. The wav file notifies the chairman that the conference is about to end and gives them the option of extending the conference.

iv. $CONF_NOTIFY can be set to any value (in seconds). If you set $CONF_NOTIFY to 60, the conference chairman will hear the warning wav file 60 seconds before the conference ends.

How to set these variables

1. Conference Time:

    a. Variable Name = $CONF_TIME (Figure 8-22)

    b. Value = $END_DATE - $DATE

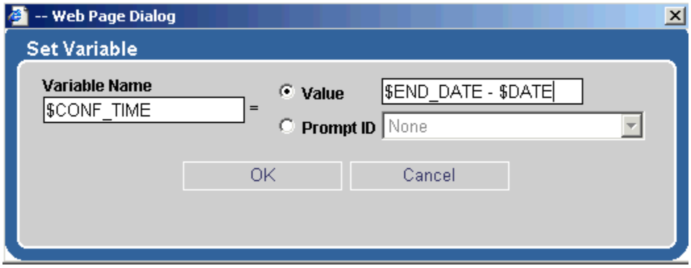


Figure 8-22 Set Variable for Conference Time

2. Chair person password:

    a. Variable Name = $CONF_SUP (Figure 8-23)

    b. Value = $passcode ==$CHAIR_PERSON

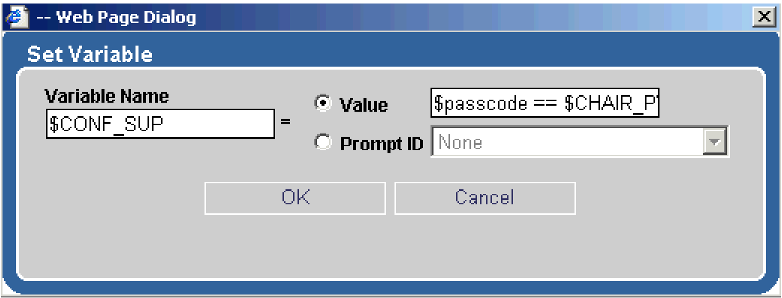


Figure 8-23 Set Variable for Chairperson's Passcode

3. Notify time before conference ends:

   a. Variable Name = $CONF_NOTIFY (Figure 8-24)

   b. Value = 60 (seconds)

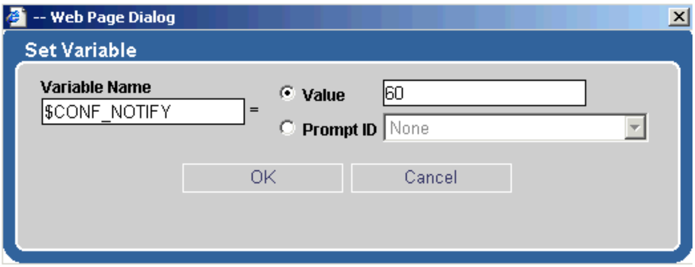


Figure 8-24 Set Variable for Notify Time Before Conference Ends

Figure 8-25 shows what the screen looks like when you finish.

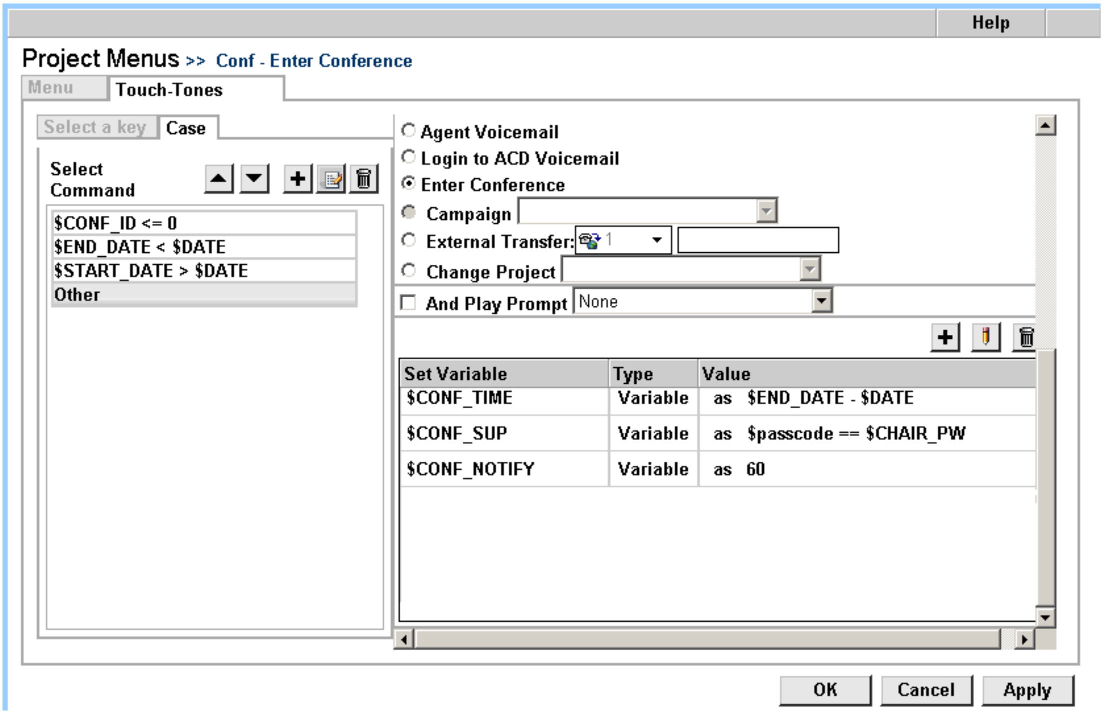


Figure 8-25 Finished Case Tab Screen

4. Create a Phone Project:

   a. Select a Project Phone number. (This is the number that participants call to join a conference.)

   b. In the Route Caller To subtab (Figure 8-26), select the **Menu** button, then select your top-level conference menu (**Conf - Get Password**, in this example).

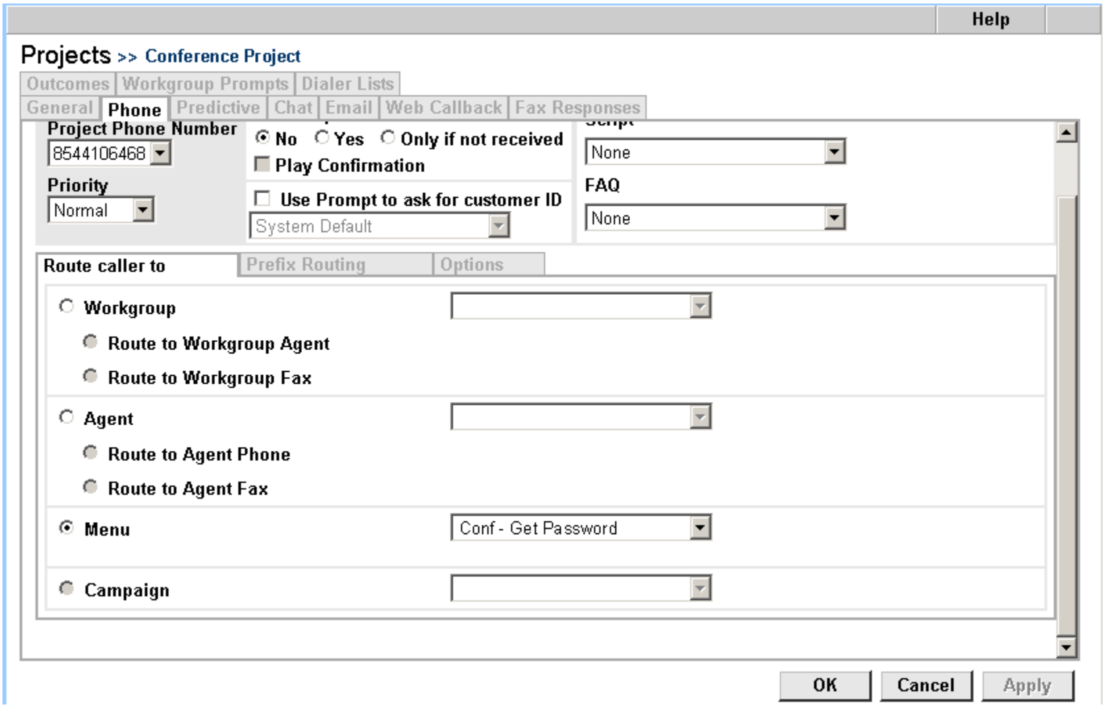


Figure 8-26 Route Caller To

Your setup is done. Users can now use the stand-alone Web page to schedule conferences.

Creating a Scheduled Conference

After an Administrator has done the conference setup, anyone with a CCA account can schedule a conference. The Administrator can also tell you what phone number has been set up for the conference call.

1. Start Internet Explorer and open the Conference Web page:

   http://<web server host>/taw/CreateConference/

   The Create Conference Web page (Figure 8-27) opens.

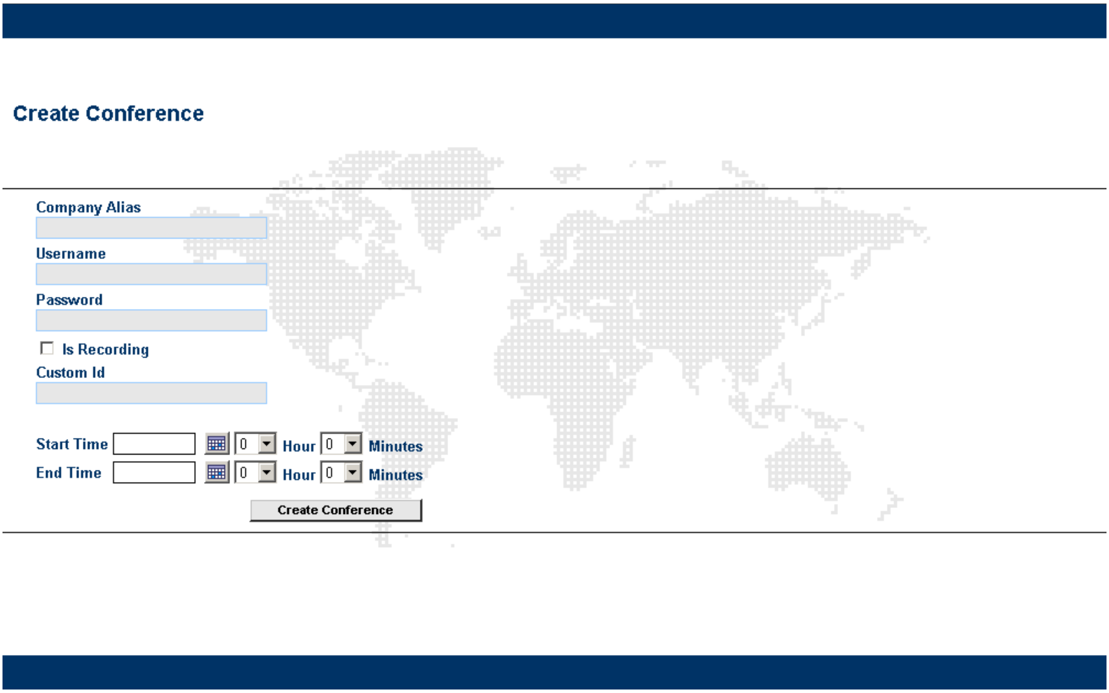


Figure 8-27 Create Conference

2. Using the information in Table 8-19, complete the fields.

Table 8-19. Create Conference Fields and Descriptions

Field	Description
Company Alias Username Password	Enter the same information that you use when you log into Administration Manager, Supervision Manager, or Interaction Manager. See your Supervisor or Administrator if you don't know what to enter in these fields.
Is Recording	Check this box if you want the conference call to be recorded. Supervisors can listen to the recorded conference later by using the Interaction History screen in Supervision Manager.

Table 8-19. Create Conference Fields and Descriptions

Field	Description
Custom ID	The Custom ID is a string associated with the conference. It is not displayed anywhere in any CC@ application. But it does get stored in the CC@ database, so companies can write custom queries to report on scheduled conferences.
Start Time End Time	Use these controls to set a start day and time and an end day and time for the conference.

3. Click the **Create Conference** button.

   The Web page displays two passwords (Figure 8-28); Chair Password and a Conference Password

Figure 8-28 Chair Password and Conference Password

Immediately copy these passwords into a text or word processing document, because without these passwords, no one can join your conference.

In general, you might want to keep the Chair password for yourself. The only difference between the two passwords is that, whoever joins the conference first using the Chair password can receive a warning notice that the conference will end soon. The chairperson can also choose to extend the conference if they wish.

- If more than one person joins the conference using the chair password, the first one to join the conference is considered the meeting chairperson and will receive the end of meeting notice.

- If two people join the conference using the chair password, and the first exits the conference, the remaining person becomes the meeting chair and will receive the end of meeting notice.

Once you have copied your passwords somewhere safe, you can use your email program to notify all of the participants about the upcoming conference. The participants need to know:

- The start day and time and the end day and time for the conference.
- The conference password.
- The conference phone number. (Your Administrator can tell you what this is.)

At the appropriate time, participants call the phone number you give them. They will be prompted to enter the conference password. If they enter the correct password, **and** the conference is in progress, they will be added to the conference.

However:

- If they enter an incorrect conference password, or
- If the conference has ended, or
- If the conference hasn't started yet,

these are all situations that are custom configured for your company and you should see your Administrator for more information.

Campaigns

Overview

In some call centers, you might want to:

- Give the customer access to a large number of options and services.
- Get information from, and present information to, the customer.
- Route the customer in complex ways, depending on their choices and preferences.

An easy way to design a complex call flow is to make a series of flowcharts (Figure 9-1) that diagram how calls can move through the system.

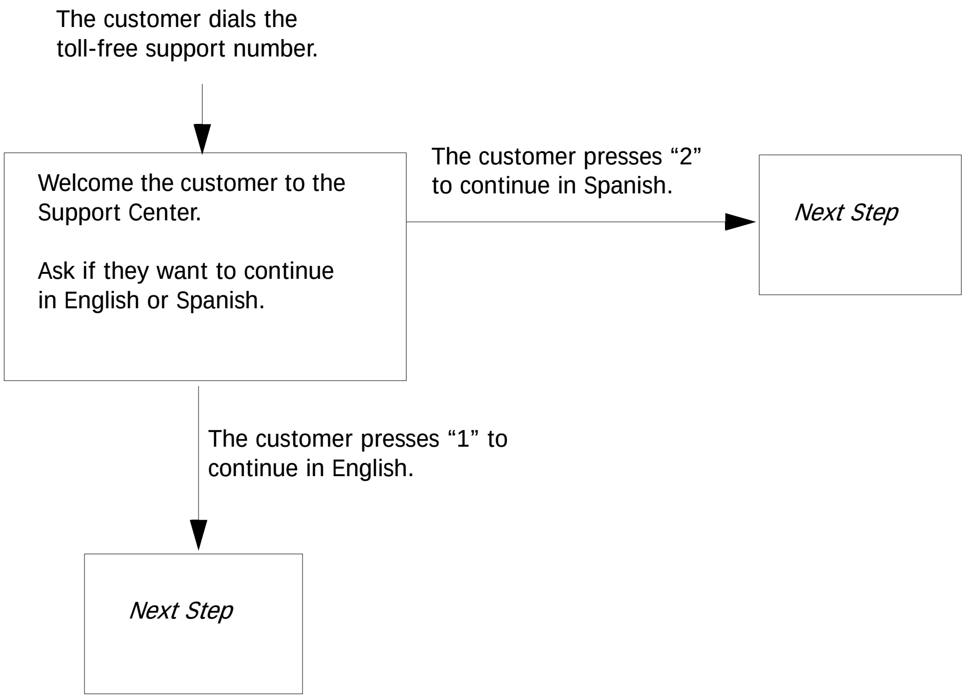


Figure 9-1 Call Flow Diagram

After finishing, create all of the pieces supporting the diagram (such as menus, prompts, SQL queries, and so forth). Then, link all of those pieces together to create the system.

Like a Project Menu, use a **Campaign** to create a sophisticated call flow in the call center. The Campaign feature has two advantages:

1. It has a flowchart-like interface, so when you create a chart of the call flow, you are actually creating the “system” at the same time.

2. Most (and in some cases all) of the parts of the call flow are encapsulated in a single Campaign object. You can open one Campaign and see all of the prompts, options, and routing for the entire call flow in a single object.

After creating a Campaign, route to it from either a Phone Project or a Project menu. CCA automatically routes anyone who reaches the Phone Project or Project Menu to the Campaign.

Campaign Tutorial

Follow the steps in this section to get a quick overview of the entire process of creating a Campaign.

1. Select **Options** > **Campaign** > the **Add** button. Wait until the Campaign editor loads.

2. In the first screen of the New Campaign Wizard (Figure 9-2), type a **Name** and **Description** for the campaign.

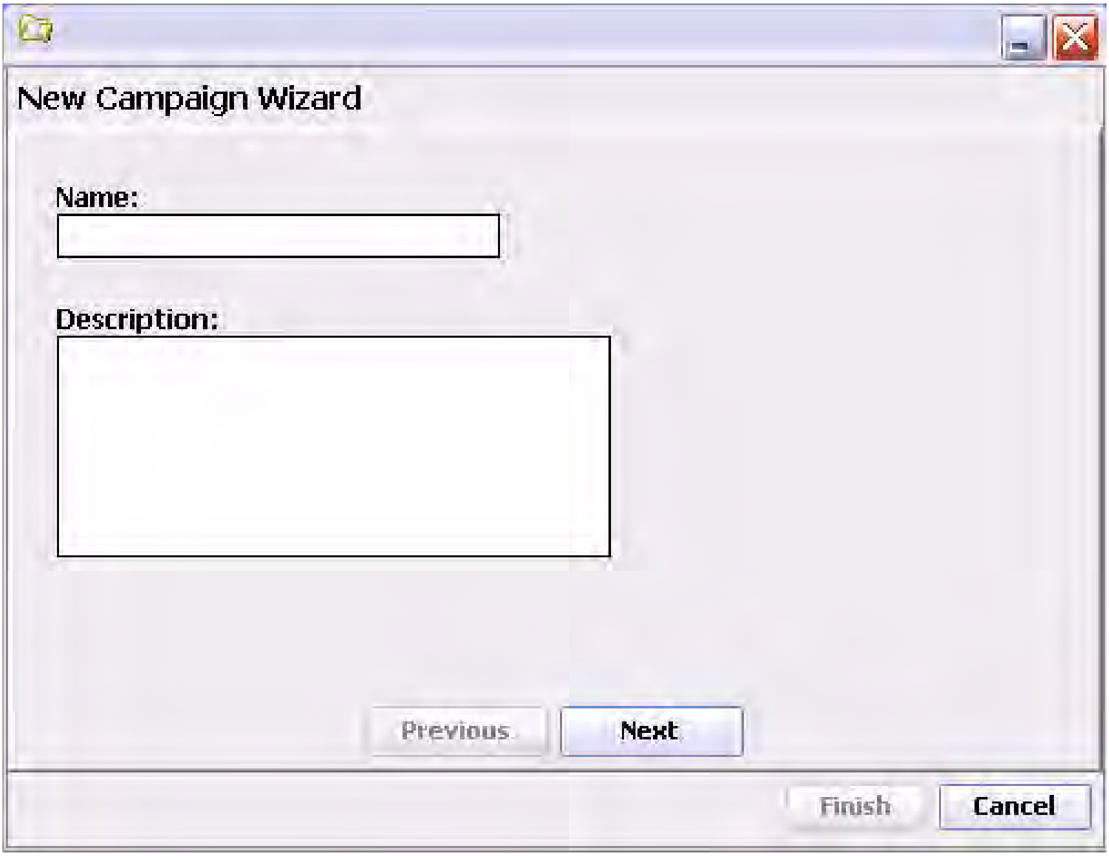


Figure 9-2 New Campaign Wizard - Screen 1

3. Click the **Next** button. The second screen appears.

Figure 9-3 **New Campaign Wizard - Screen 2**

4. Using the information in Table 9-1, complete the fields.

Table 9-1. Campaign Wizard Screen 2 Fields and Descriptions

Item	Description
In Case of Any System Error, Go To:	Set up the routing condition to execute when a system error occurs. A system error occurs when the campaign cannot take any other routing action. For example, if one node is configured to route to another node, and the second node was deleted, a system error occurs and CCA executes the routing action selected here.

Table 9-1. Campaign Wizard Screen 2 Fields and Descriptions

Item	Description
	From the drop-down menu, select an area to route system errors from: • Workgroup • Workgroup Voicemail • User • User Voicemail Disconnect
Allow Type Ahead	If a node exists, anywhere in the campaign, that plays a prompt and then traps the user's keypress with a **Get User Digit** or **Get DTMF** action, the user can enter their response without listening to the entire prompt. • See "Get User Digit" on page 9-26. • See "Get DTMF" on page 9-30.
Enter Digit Timeout	This option applies to any place in the campaign where the customer must enter multiple key presses. The **Enter Digit Timeout** is the amount of time to wait between key presses. When the timeout is reached, the campaign moves on to the next action (such as validating the customer's entry, making a routing decision, and so on).

3. Click the **Finish** button. A new campaign window (Figure 9-4) appears with a **Begin node**.

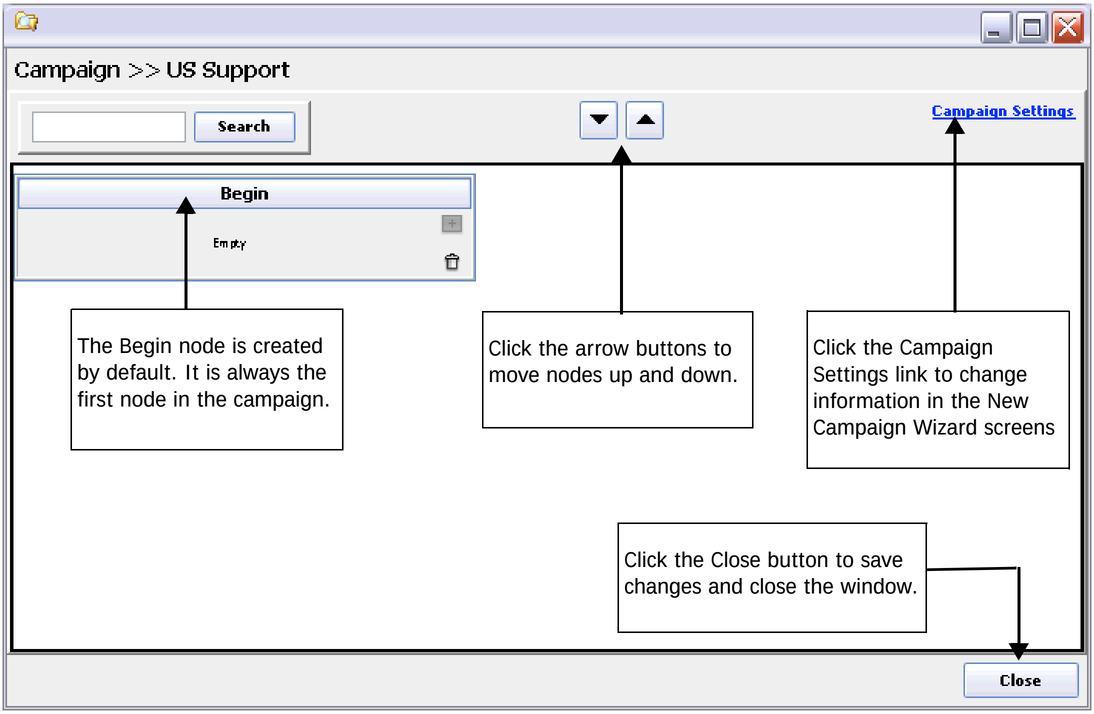


Figure 9-4 New Campaign Screen

A node is a like a block in a flowchart. When creating a new campaign, start with the **Begin** node. The Campaign Wizard automatically creates it. It represents the first thing to happen when people reach the campaign. The Begin node is the only node that you ***cannot*** delete.

A node provides three main actions:

- **Take some action**: For example, play a prompt, capture the customer's key presses, run a SQL query, and so on. Take more than one action in the same node, if desired. For example, in one node ask the customer to enter their account number, capture the number that they enter, and verify the account number in the database - all in one node.

  (For more details about actions, see "Adding Actions to Nodes" on page 9-22.)

- **Route to a child node if some condition occurs**: For example, if the customer presses **2** to continue in Spanish, route the caller to another node that plays a Spanish menu, and do further call flow from there. Routing to a child node is one way to create new nodes in the campaign.

  (For more information about conditional routing, see “Menu Routing Conditions” on page 9-35.)

- **Route to a feature**: This is like a very powerful **GoTo** statement in programming. By “routing to a feature” CCA sends the call to any node in the current campaign or to the begin node of another campaign, or you can also take the caller out of the campaign and route them to some other feature of AM (such as a project or workgroup extension).

  (For more about feature routing, see “Menu Types” on page 9-18.)

Example: Set an action for the node

1. Right-click on a node and select **Set Action Menu** (Figure 9-5).

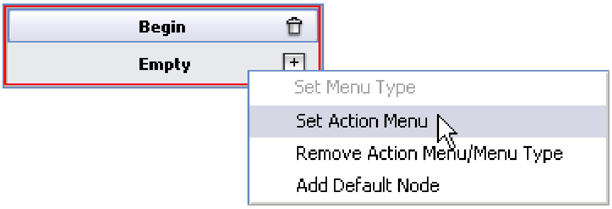


Figure 9-5 Select Set Action Menu

The Action menu (Figure 9-6) appears.

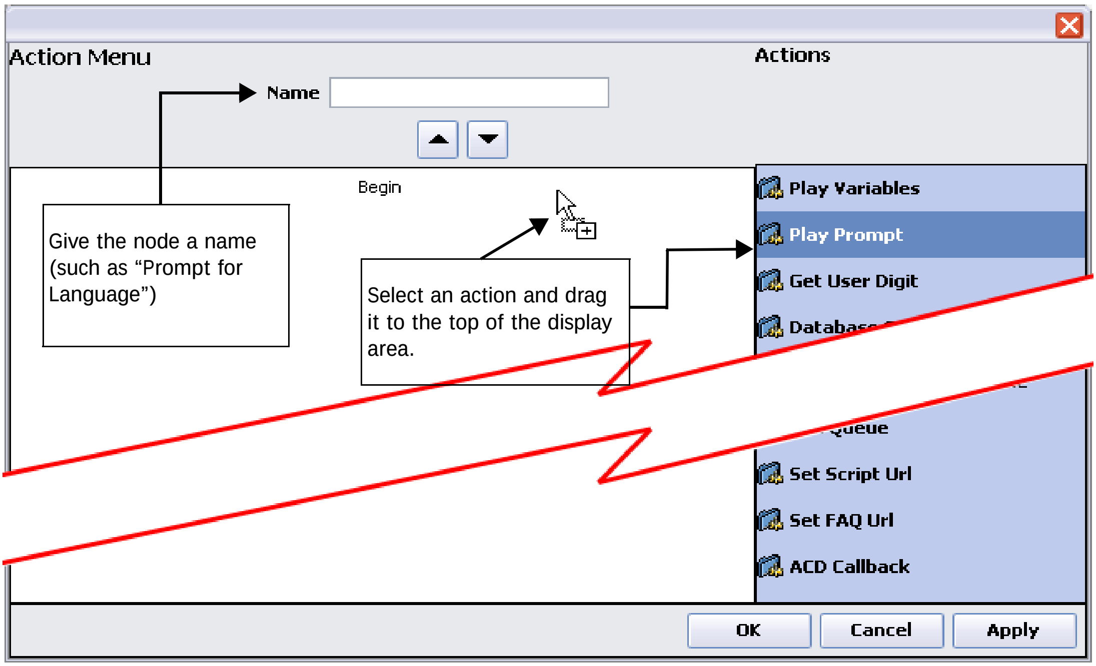


Figure 9-6 Action Menu

Set many actions for a node. For more information about each action type, see "Adding Actions to Nodes" on page 9-22.

2. For a simple campaign, add a **Play Prompt** action, and assume a Company Prompt like this already exists:

   "Press 1 to continue in English. Press 2 to continue in Spanish."

3. Click the **Play Prompt** action and drag it to the display area. A window (Figure 9-7) appears showing options for the action.

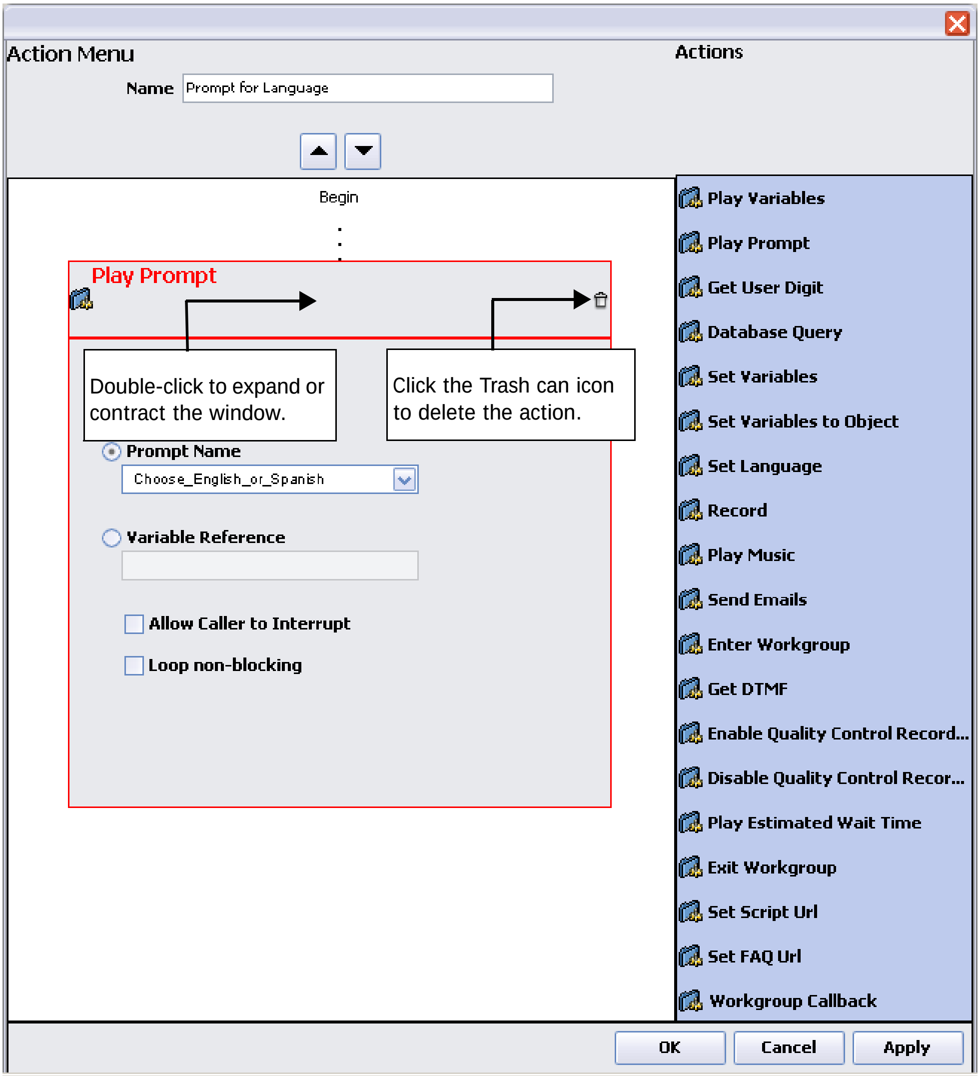


Figure 9-7 Add Play Prompt Action

4. After adding the **Play Prompt** action, drag a **Get DTMF** action to the top of the display area.

5. Double-click the **Get DTMF** action (Figure 9-8) to show its properties.

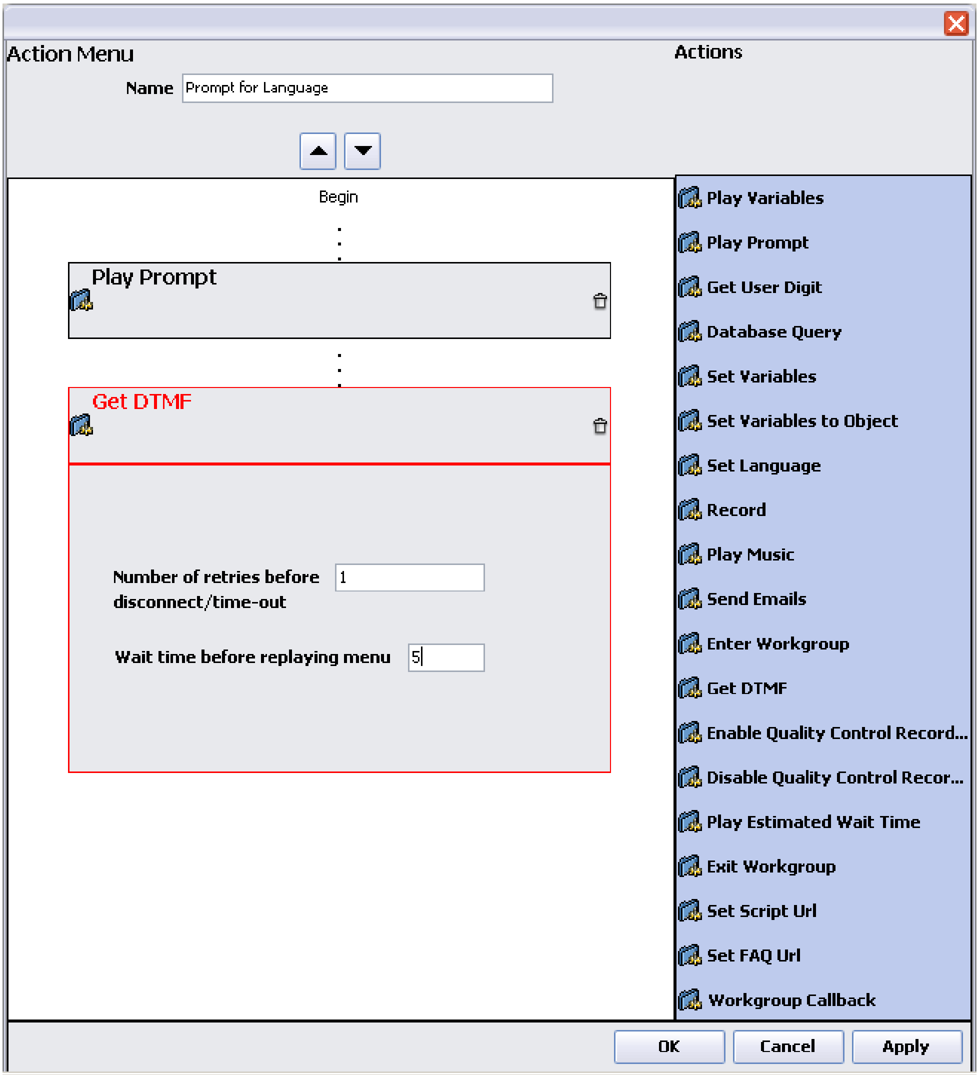


Figure 9-8 Get DTMF Properties

For more information about the **Get DTMF** action, see page 9-30.

6. For this example, set the Number of Retries to **1** and the Wait Time to **5** seconds, so that this campaign uses the Get DTMF action to trap the customer's response when they select a language.

7. When finish selecting options for the action, click the **OK** button to close the Action Menu window.

   The main campaign window (Figure 9-9) shows a child "Default" node.

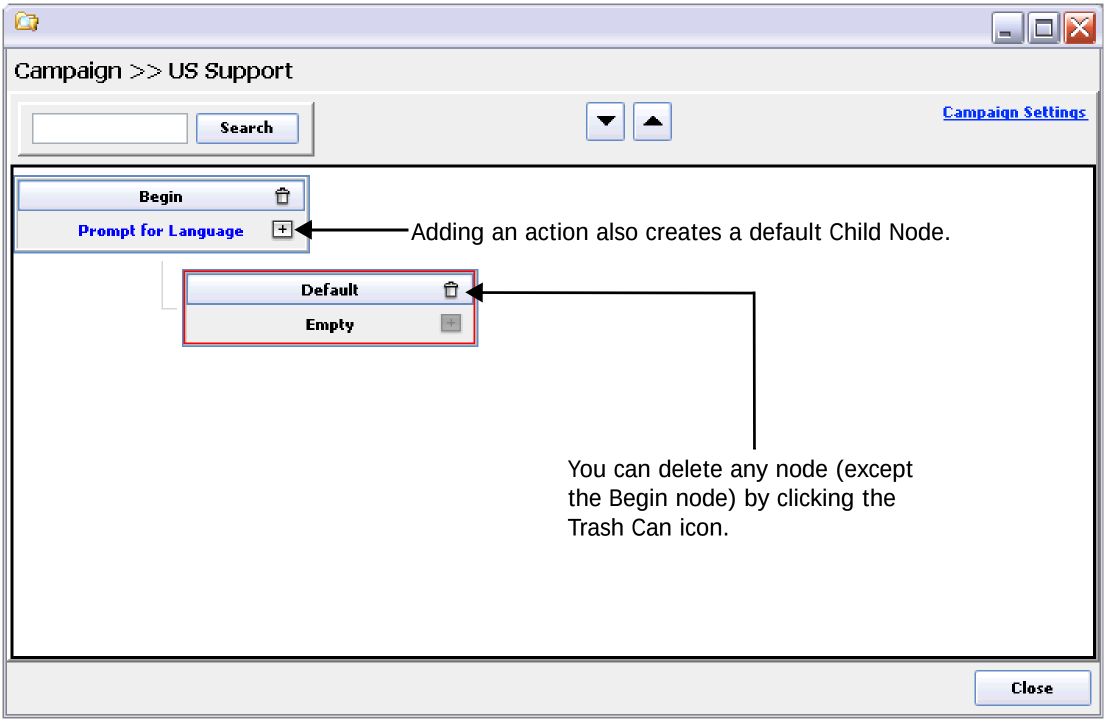


Figure 9-9 Child Node

The Campaign Wizard creates a child default node when:

- Setting an action on a node.
- Routing to another node.

The default node provides the system a way to route the call, no matter what happens. For example, the customer hears a prompt to press 1 to continue in English or 2 to continue in Spanish. However, for some reason, the customer presses **3** or **#**.

The Default node is happens to the call if none of the other conditions are met.

If you delete a default node and the customer does something unexpected, the Campaign Wizard routes the call to the **In Case of Any System Error, Go To** setting you selected when creating the campaign. (View or edit this setting by clicking the **Campaign Settings** link, in the top right corner of the Campaign window, and then clicking the **Advanced** tab.)

For this example, set the default node to hang up if anything unexpected happens.

8. Right-click on the default node and select **Set Menu Type**.

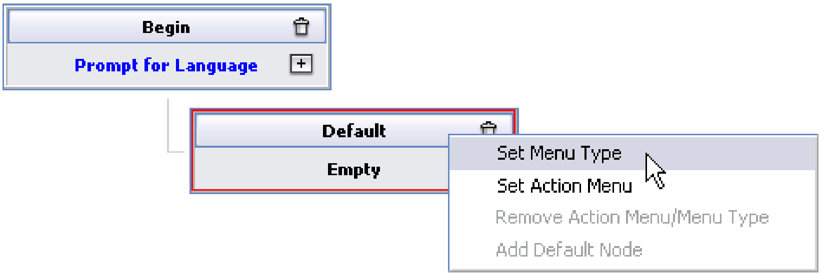


Figure 9-10 Select Set Menu Type

The Menu Type window (Figure 9-11) appears.

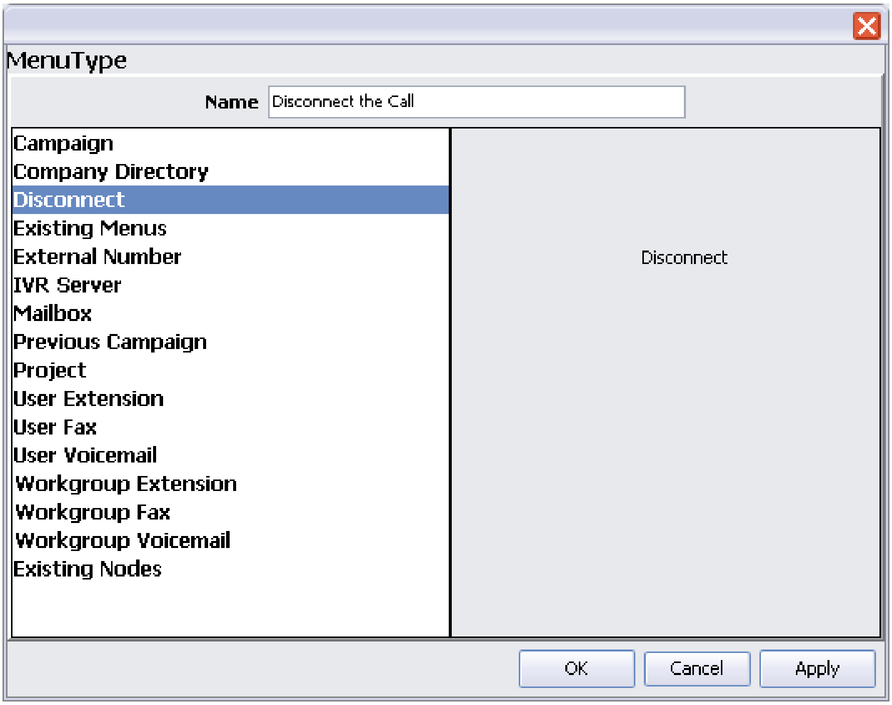


Figure 9-11 Window Type

The Campaign Wizard uses the Menu Type window to route the call to a feature.

For more information about the choices in the Menu Type window, see page 9-18.

9. Select the **Disconnect** feature.

10. Type some text in the **Name** field to describe your choice.

11. Click **OK**.

Route to a child node (add routing conditions)

Now, the example campaign consists of a prompt asking the user to select **1** for English and **2** for Spanish. It also has a default child node that to disconnect the call if anything unexpected happens.

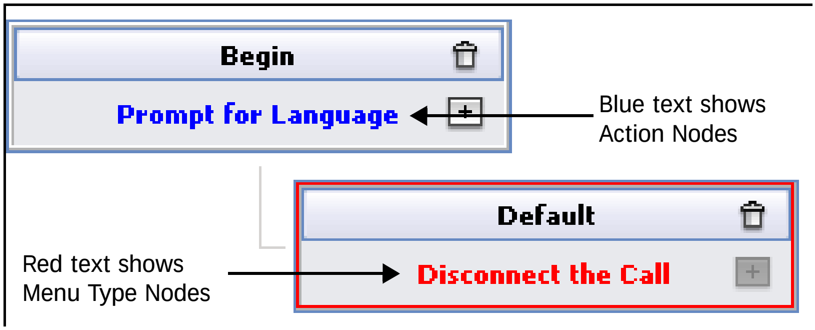


Figure 9-12 Action Node and Menu Type Node

1. Add the routing to route the customer to a Child node (based on their keypress, trapped with the **Get DTMF** action):

   i. Click the plus ([+]) icon in the **Begin** node. The Menu Routing Conditions window (Figure 9-13) appears:

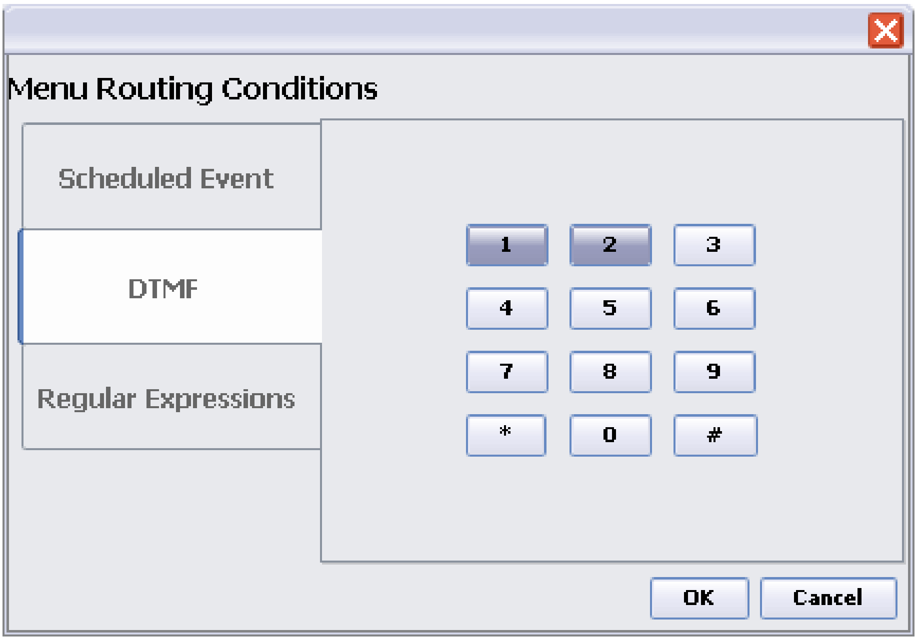


Figure 9-13 Menu Routing Conditions

For more detailed information about this window, see “Menu Routing Conditions” on page 9-35, but for now:

ii. Click the **DTMF** button, to set up routing conditions based on a user keypress.

iii. Click buttons **1** and **2** to highlight them and then click the **OK** button.

The Campaign window now looks like Figure 9-14:

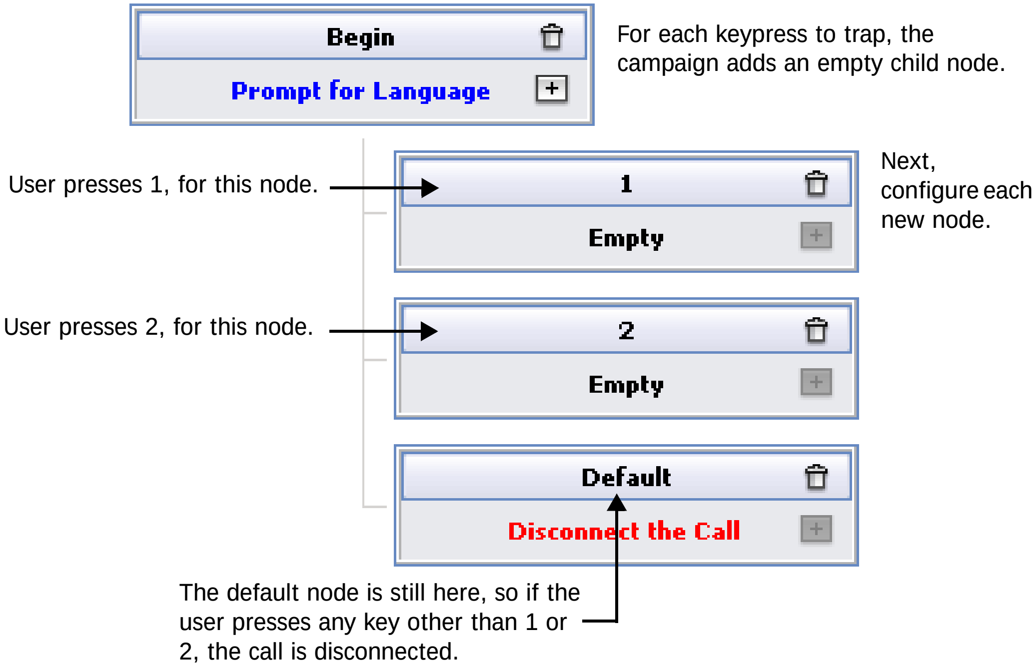


Figure 9-14 Example Campaign

At this point, the campaign prompts the customer to press a key routes them to a node based on the key that they pressed.

2. Now, configure those new nodes to do something. For this example, configure the “keypress 1” node to set the prompt language to English, and the “keypress 2” node to set the prompt language to Spanish.

i. Right-click the **keypress 1** node and select **Set Action Menu**.

ii. In the Action Menu window, drag the **Set Language** option into the display area.

iii. Double-click the **Set Language** window.

iv. From the Language drop-down menu, select **English**.

3. Repeat the above steps for the “keypress 2” node and set the language to Spanish.

4. When finished, the campaign window should look like Figure 9-15:

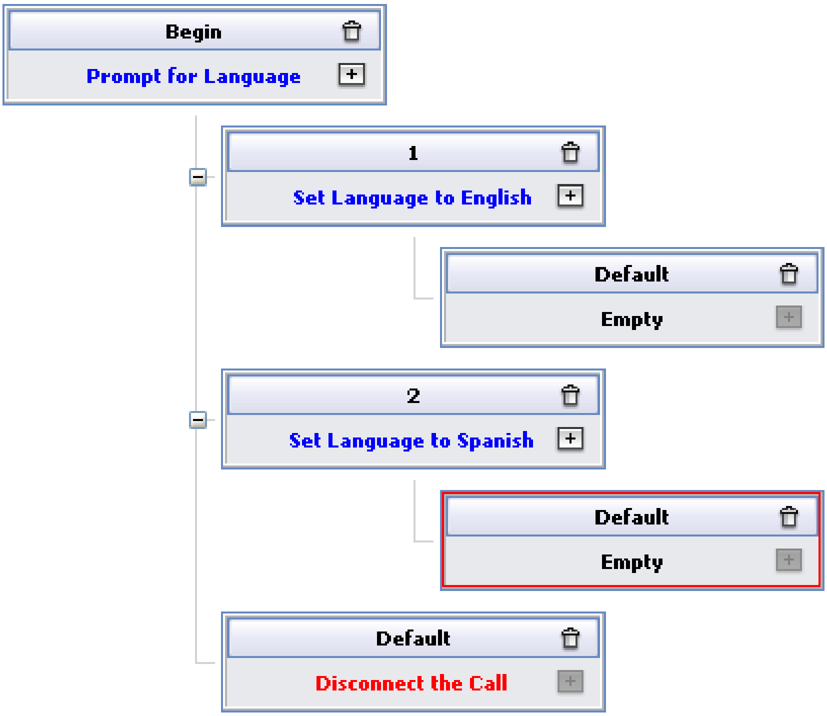


Figure 9-15 Example Campaign Window

When setting the language in “keypress 1” node and “keypress 2” node, the campaign also created a Default node for each. You can delete these extra default nodes, but in a real campaign, you would probably use them to continue routing the call, taking additional actions, and so on.

5. Click the **Close** button.

6. Now, route to the Campaign from either a Phone Project or a Project Menu:

To associate a campaign with a project

1. Open a project and select the **Phone** tab.

2. At the bottom of the Phone tab, click the **Campaign** radio button.

3. From the drop-down menu, select the name of the campaign

   Now, when a customer calls the project phone number, the campaign instantly routes them to the **Begin** node.

To associate a campaign with a project menu

1. Open a project menu and select the **Touch-Tones** tab.

2. On the left side of the screen, select a key.

3. On the right side of the screen, click the **Campaign** radio button.

4. From the drop-down menu, select a campaign.

A Closer Look

This section provides information about:

- Menu Types
- Actions
- Nodes and Routing Conditions

Menu Types

Use the Menu Type window to route the caller to a feature.

- You can route to features that are ***inside*** a campaign. (For example, use the Menu Types window to route a call to any node in the current campaign.)
- You can route to AM features that are ***outside*** the campaign. (For example, route a call to an external number or to a project.)

A node with a Menu Type is a termination point and does not need any child nodes (see “Menu Types” on page 9-18). The campaign sends the call to another node or to some other feature.

To add a Menu Type to a node

1. Right-click a node and select **Set Menu Type** (Figure 9-16).

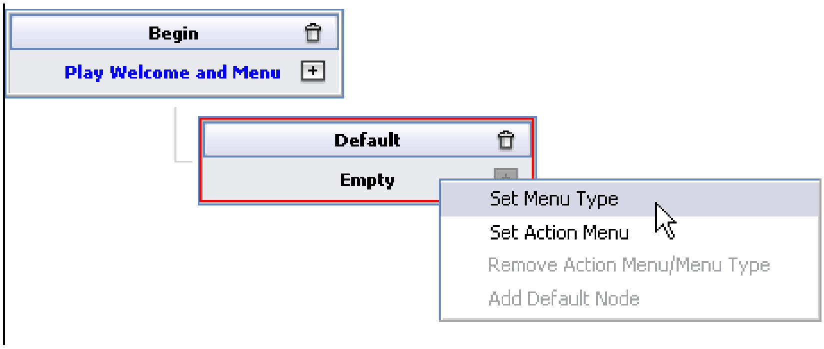


Figure 9-16 Select Set Menu Type

The Menu Type window (Figure 9-17) appears:

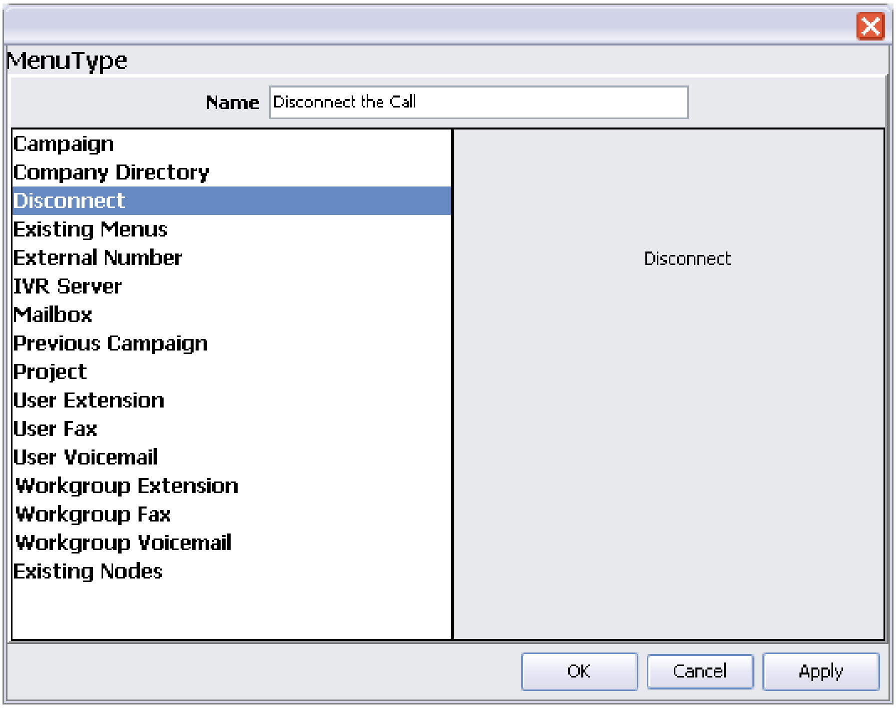


Figure 9-17 Menu Type

2. Using the information in Table 9-2, complete the Menu Type screen.

Table 9-2. Menu Type Items and Descriptions

Item	Description
Campaign	Route the call to the Begin node of any campaign, including the current campaign.
Company Directory	Play the Company Directory Navigation prompts, which allow a caller to reach an agent by entering the agent's name.
Disconnect	Immediately disconnect the call.
Existing Menus	Route the call to an existing Project Menu.

Table 9-2. Menu Type Items and Descriptions

Item	Description
External Number Country Code Phone	Route the call to any external number (outside the company). From the drop-down menu, select a country code. Type the complete phone number. (For example, in the United States, select **1** as the Country Code type a 10-digit number.)
Mailbox	Select this option to play the prompt `entermailbox.wav` ("Please enter your mailbox number, followed by the pound key") to allow call center agents to access their non-ACD voicemail messages from a remote telephone and to set up their voicemail greetings. **Notes**: For agents to access the Mailbox Manager remotely: • The agent's user name and password (Options > Agents > Profile) must consist only of numbers. For example, the agent's user name could be "1234" and their password could be "5678." • A POP3 server must be configured for the agent (Options > Agents > Email > Defined POP3 Server). To prevent customers from accessing the Mailbox Manager feature, leave it out of the recorded prompt. (Tell agents they can press a key to access their voicemail messages, but that the feature is not described as an option in the recorded prompt.)
Previous Campaign	If the call was routed to the current campaign from another campaign, this option routes the call to the Begin node of that **previous** campaign. If the routing logic of the campaign allows this node to be reached and there is no "previous campaign," a system error occurs and the campaign executes the system error routing decision (see "Changing the Campaign Settings" on page 9-56).
Project	Route the call to an existing project.

Table 9-2. Menu Type Items and Descriptions

Item	Description
User Extension User Fax User Voicemail Workgroup Extension Workgroup Fax Workgroup Voicemail	These six options work the same. From a drop-down menu, select a User/Workgroup name or enter a variable that was assigned the ID of a user or workgroup. (See "Using variable reference fields" on page 9-58.) If you use a variable for one of these options and the variable has no value when it is executed, a system error occurs and the campaign executes the system error routing decision. (See "Changing the Campaign Settings" on page 9-56.) **Note**: You can also route to a workgroup from an Action. See "Enter Workgroup" on page 9-29.
Existing Nodes	Route the call to any node in the current campaign.

To remove a Menu Type from a node

1. Right-click a node and select **Remove Action Menu/Menu Type** (Figure 9-18).

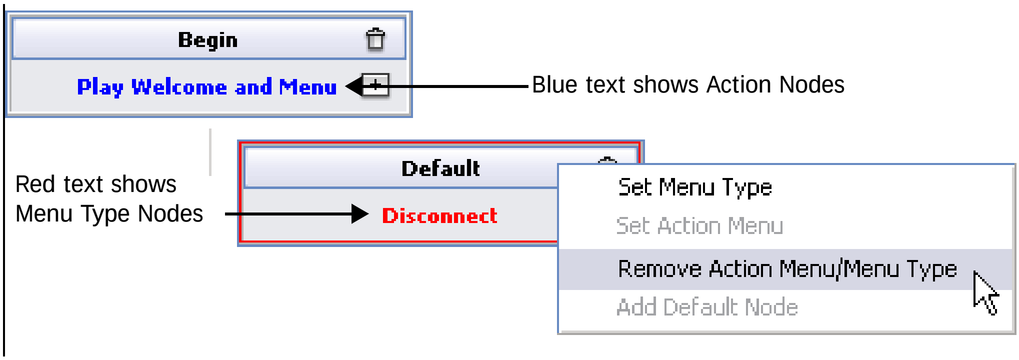


Figure 9-18 **Select Remove Action Menu/Menu Type**

Adding Actions to Nodes

Add an Action to a node to:

- Give the caller some information.
- Get information from the caller.
- Take action on behalf of the caller.

To add an action to a node

1. Right-click a node and select **Set Action Menu** (Figure 9-19).

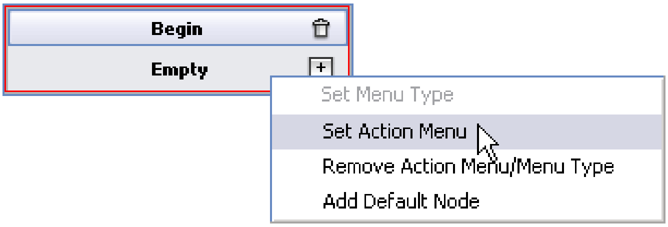


Figure 9-19 Select Set Action Menu

The Action Menu window (Figure 9-20) appears:

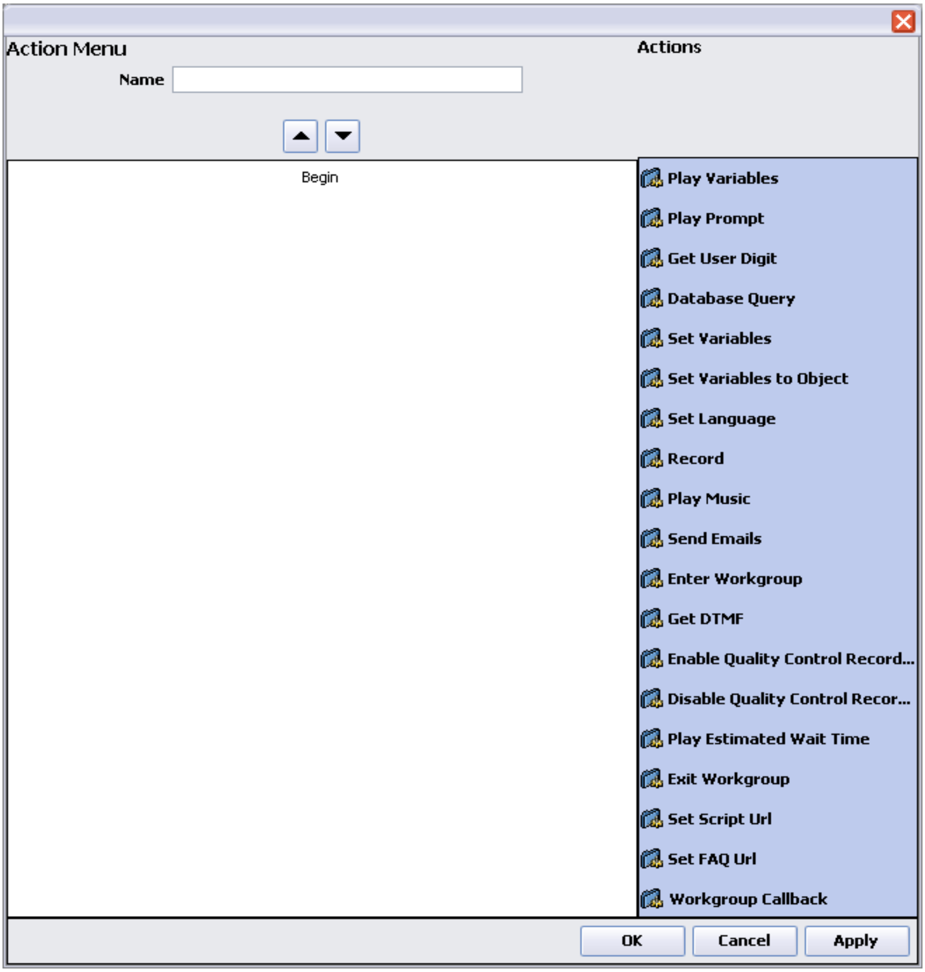


Figure 9-20 Action Menu

2. Set more than one action in the same node. For example, in the same node set:

   - Play a prompt (to asks the customer to enter their account number.)
   - Trap the user's account number.
   - Run an SQL query (to verify that the account exists and to find the user's balance).
   - Read the user's balance to them.

a. To add more than one action to a node, can use the arrow buttons (Figure 9-21) to rearrange the actions.

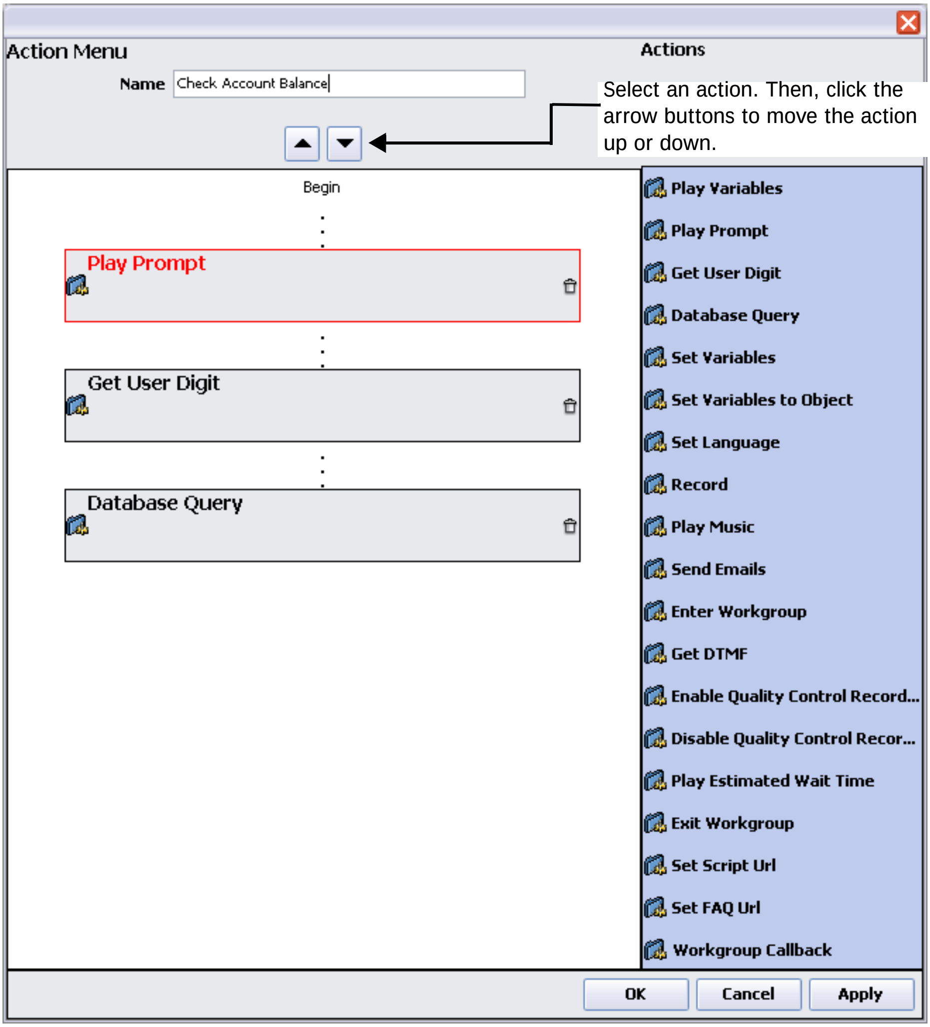


Figure 9-21 Rearrange Actions

b. Using the information in Table 9-3, complete the Action Menu

Table 9-3. Action Menu Items and Descriptions

Item	Description
Play Variables	**Select Variable**: Type the name of the variable to play. The variable must already exist and have a value. **Select Type**: Choose the way the caller hears the variable's value: • **Currency**: If the variable's value is "12345," the caller hears: "One hundred twenty three dollars and forty-five cents." • **Number**: If the variable's value is "12345," the caller hears: "Twelve thousand three hundred and forty-five." • **Spelling**: If the variable's value is "12345," the caller hears: "One, two, three, four, five." • **Date (yyyymmdd)**: Assumes that the variable is a date in the format yyyymmdd. If the variable's value is 20040710, the caller hears "July 10, two-thousand and four." • **Date (seconds since 1970)**: Assumes the variable has a POSIX formatted date (number of seconds since 1970). If the variable's value is 20040710, the caller hears "July 10, two-thousand and four." • **Date at Time**: Same as above, but also tells the caller the time. • **Time (seconds since 1970)**: Assumes that the variable contains a POSIX time value. If the variable's value contains the POSIX equivalent of 10:35 AM, the caller hears "Ten thirty-five, AM." • **Time (hhmm)**: Assumes that the variable contains a time value in the 24-hour format hhmm. If the variable's value is 1035, the caller hears "Ten thirty-five, AM." • **Prompt**: Assumes that the variable contains the ID of a prompt. See "Using variable reference fields" on page 9-58.
Play Prompt	**Prompt Name**: Select the prompt to play. **Note**: You can only select an existing company (custom) prompt. (You cannot select a system prompt.)

Table 9-3. Action Menu Items and Descriptions

Item	Description
	Variable Reference: Type a variable that contains the ID of a custom prompt. See "Using variable reference fields" on page 9-58. **Allow Caller to Interrupt**: Check so that the customer can enter a keypress while the prompt is playing. As soon as the customer presses a key, the prompt stops playing.
Get User Digit	**Number of Digits**: The number of digits entered by the caller. **Note**: This includes any terminator in the prompt. For example, "Enter your account number; then press the pound (#) key." **Result Store in Variables**: The variable name in which to store the digits that the caller enters. **Validate**: Check to have CCA read the caller's entry back to them for verification. The caller can select **1** to approve or **2** to re-enter the data. **Terminator**: Check o the caller can enter a terminating key telling the system "I have finished entering the information you asked for." For example, after asking the caller to enter their account number, ask them to press the pound (#) key (the terminator). A terminator is useful if the caller's information can be different lengths (as when some account numbers are longer than others). **Number of retries before disconnect/time-out**: Type the number of times CCA replays the menu prompt before disconnecting the call. **Wait time before replaying menu**: Type the time (in seconds) CCA waits before replaying the menu prompt.
Database Query	Use the Database Query action to run an SQL query and trap the result table. • See the examples for writing SQL queries, beginning on page 8-35.

Table 9-3. Action Menu Items and Descriptions

Item	Description
	• Before using the Database Query action, create a Database Connection. (See page 9-67 for more information.) A database connection points to a system DSN previously created. After creating a database connection, select it from the Database Source drop-down menu (below). Your query runs against the database you select. **SQL Query**: Enter the SQL Query the system will run. **Query Result Status Variable**: Type a variable name. After the query completes, system copies the value of $SQLSTATUS to the variable: FAIL NOROWS PENDING SUCCESS TIMEOUT **Query Timeout (sec)**: Type a time limit for the query to return a status. If the timeout is exceeded, the Query Result Status Variable has the value 'Timeout'. No result table is returned. However, the system does not terminate the query. **Maximum Number of Rows Variable**: Type a variable name. When the query completes, the system assigns the variable the number of rows in the result table. **Maximum Number of Rows**: Type the maximum number of rows the result table contains. (You cannot enter a value greater than 99 in this field.) **Database Source**: Select a Database Connection. The query runs against this database.

Table 9-3. Action Menu Items and Descriptions

Item	Description
Set Variables	Use this action to: • Create and initialize new variables • Set the value of an existing variable. Type the variable name in the left text box and the value in the right text box. You can also use string, numeric, and comparison operators. **Examples**: $tmp = 'hello' $tmp = $tmp1 > $tmp2 $tmp = 1 + $tmp2
Set Variables to Object	Use this action to assign the ID of a workgroup, user, or prompt to a variable. See "Using variable reference fields" on page 9-58. • From the Select Type drop-down menu, select an object type. • In the left text box, type the name of a new or existing variable. • From the drop-down menu on the right, select a specific workgroup, user, or company (custom) prompt.
Set Language	From the drop-down menu, select a language. From this point in the campaign, the system plays all prompts in this language. Make sure to record all prompts in the language you select. (If you are missing any prompts, the customer hears only silence when the system should play the prompt.)
Play Music	Select to play streaming audio (music broadcast) to a caller. In the Play Music action, select a existing broadcast source. (See the tech note "Setting Up a Music Broadcast" on page 5-5 to learn how to create a music broadcast source.) **Select Source**: Select an existing music broadcast source.

Table 9-3. Action Menu Items and Descriptions

Item	Description
	Play For: Click the check box and type a time value (in seconds). The music broadcast plays for this duration. At the end of this time, the campaign continues to the next action in the current node or to the next node. **Allow Caller to Interrupt**: Check so that the caller can interrupt the music broadcast at any time by pressing any key. When the caller interrupts the music broadcast, the campaign continues to the next action in the current node or to the next node. **Note**: You must do at least **one** of the following: • Enable the **Play For** option • Enable the **Allow Caller to Interrupt** option • Precede the Play Music action with an Enter Workgroup action If you do not, the caller remains stuck listening to the music broadcast forever.
Send Emails	Select to send an email to any valid address or email group. Before selecting this action, at least one SMTP Group must exist. (See “Creating an SMTP Server Group Library” on page 4-64.) • Max length of the From field: 128 characters. • Max length of the To field: 128 characters. • Max length of the Subject field: 128 characters. • Max length of the Message field: 2048 characters.
Enter Workgroup	Select to route a call to a workgroup, but keep the option to bring the caller back to the campaign. If you use the Menu Type dialog box to route to a Workgroup Extension/Fax/Voicemail (see page 9-21), the campaign immediately routes the call to the workgroup and cannot return to the campaign. If you use the Enter Workgroup action, the campaign requests an available agent, but keeps control over the call until an agent accepts it.

Table 9-3. Action Menu Items and Descriptions

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td></td><td>• The campaign node can play music, prompt the customer for more information, and so on.
• Any time before an agent accepts the call, you can use the Exit Workgroup action to return the call to the campaign.
• After an agent accepts the call, the call permanently exits from the campaign.

Select Workgroup: The campaign requests an available agent from the workgroup you select.

Variable Reference: Type the name of a variable that was assigned the ID of a workgroup. (See “Using variable reference fields” on page 9-58.)

If your variable has an invalid workgroup name, the campaign routes the call to the system error choice. (See “Changing the Campaign Settings” on page 9-56.)</td></tr>
<tr><td>Get DTMF</td><td>Use the Get DTMF action to:

• Prompt the user to make a choice by pressing a key (Such as “Press 1 to continue in English...”)
• Trap the user’s keypress.
• Route to a special child node to handle their keypress.

A Play Prompt action always precedes the Get DTMF action. The Get DTMF action always uses a special “DTMF child nodes” (to handle the keypress) and is created with the Menu Routing Conditions dialog box.

The Get DTMF action only has two options:
• Number of Retries Before Disconnect/Timeout: The number of times to replay the prompt if the caller does not press a key or does not press a valid key.
• Wait Time Before Replaying Menu: The time to wait for the caller to press a key.

However, much execution logic exists behind these two simple options. See Figure 9-22 on page 9-34 for all details.</td></tr>
</table>

Table 9-3. Action Menu Items and Descriptions

Item	Description
	See Also: • The Campaign tutorial includes a simple example of how to use the Get DTMF action and the DTMF child nodes. See page 9-8. • See "Routing a DTMF (customer keypress)" on page 9-41 for more information about the DTMF child nodes.
Enable Quality Control Recording	Select to record both sides of a call as soon as an agent accepts the call. • The recording continues until disconnecting the call. **Note**: Supervisors can listen to the recording in the Supervision Manager program "Review Recording" screen.
Disable Quality Control Recording	Select to ensure calls are not recorded in the campaign. **Note**: AM overrides this action > Options > Agents > Controls and Restrictions > Enable Automatic Recording of Agent feature. See page 6-7 for more information.
Play Estimated Wait Time	Select to inform the customer (phone or Web chat) of their estimated wait time.
Exit Workgroup	The **Enter Workgroup** action always uses the Enter The Exit Workgroup action. Use the Enter Workgroup action to request an available agent from a workgroup while the campaign keeps control over the call. (See "Enter Workgroup" on page 9-29.) After an agent accepts the call, the call leaves the campaign forever. At any time before an agent accepts the call, you can "cancel" your request for a workgroup agent and return the call to normal execution by the campaign by adding an Exit Workgroup action to a node. For example, your Campaign might: • Ask the caller to press "1" to speak to an agent. • Trap the caller's keypress. • Route to a child DTMF node if the caller pressed "1." • Use Enter Workgroup to request an available agent. • Check estimated wait time.

Table 9-3. Action Menu Items and Descriptions

Item	Description
	Note: If the caller waits too long, use Exit Workgroup to route them to another option in the campaign.
Set Script URL	From the drop-down menu, select a script to display to the agent when CCA routes the call to them.
Set FAQ URL	From the drop-down menu, select an FAQ to display to the agent when CCA routes the call to them.
Workgroup Callback	Use the Workgroup Callback action to: • Get the caller's country code and phone number. • Send a callback request to a workgroup. The workgroup callback action submits the callback request to the workgroup and then disconnects the call. For example, one node could have these actions: • Play Prompt: Prompt the caller for their country code. • Get User Digit: Trap the country code in a variable. • Play Prompt: Prompt the caller for their phone number. • Get User Digit: Trap the phone number in a variable. • Workgroup Callback: Send the caller's country code and phone number to the selected workgroup, and then disconnect the call. **Variable Country Code**: Enter a variable name that is populated with a country code. **Variable Phone Number**: Enter a variable name that is populated with a country code. **Current Workgroup**: Only use this option if a Enter Workgroup action was used previously. The system uses whatever workgroup is selected in "Enter Workgroup." If, for some reason, the campaign cannot find a valid "current Workgroup," it routes the call to the system error choice. (See "Changing the Campaign Settings" on page 9-56.) **Select Workgroup**: Send the callback request to the selected workgroup.

Table 9-3. Action Menu Items and Descriptions

Item	Description
	Variable: Type a variable name that is populated with the ID of a workgroup. See "Using variable reference fields" on page 9-58. If your variable does not contain the name of a valid workgroup, the campaign routes the call to the system error choice. (See "Changing the Campaign Settings" on page 9-56.)

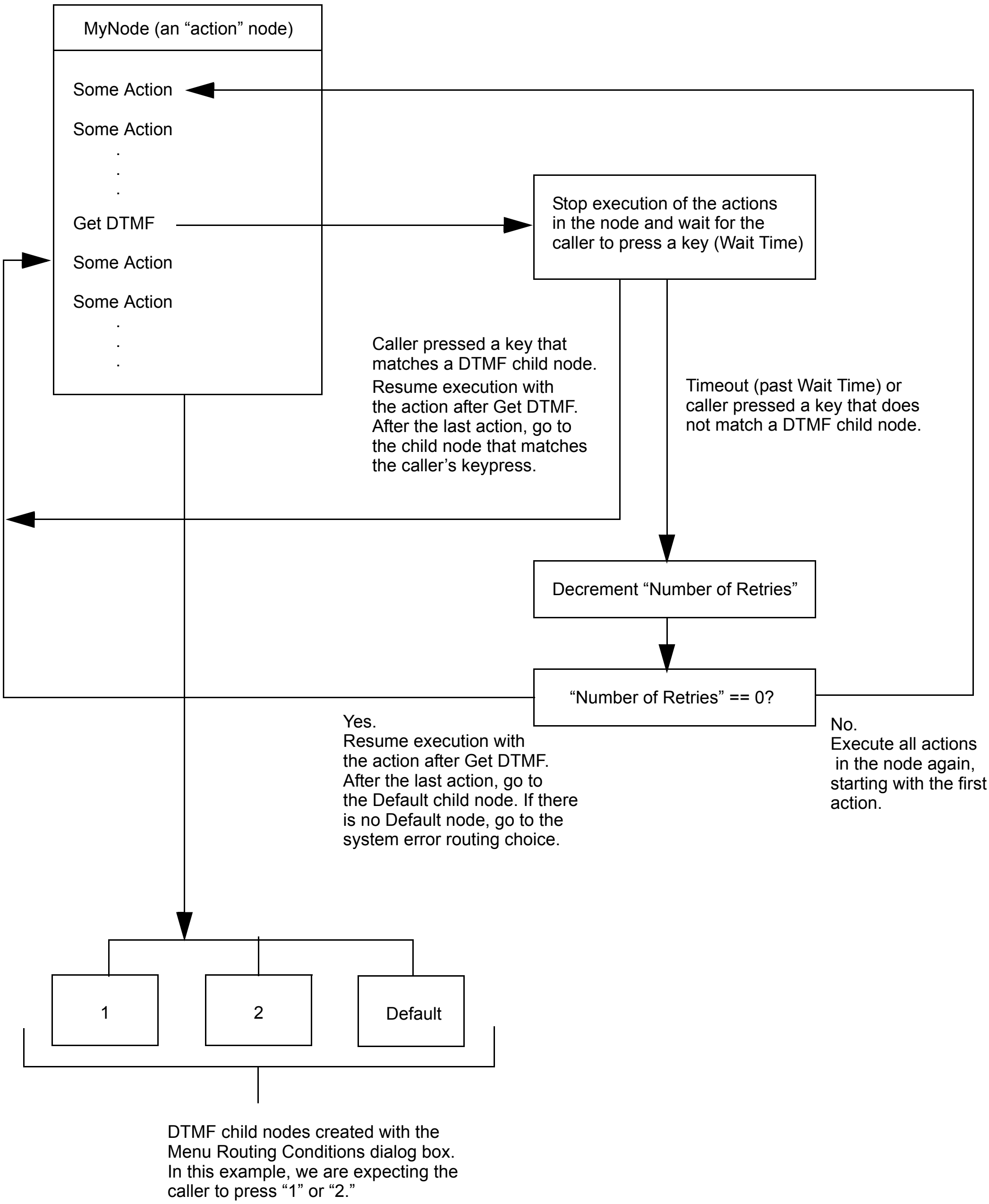


Figure 9-22 Execution Logic of the Get DTMF Action

To remove a Menu Type from a node

1. Right-click a node and select **Remove Action Menu/Menu Type** (Figure 9-23).

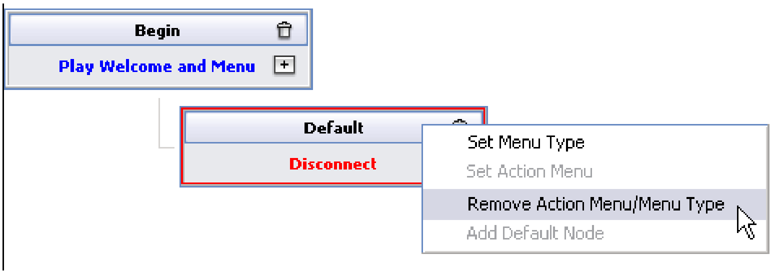


Figure 9-23 Select Remove Action Menu/Menu Type

Menu Routing Conditions

Menu Routing Conditions allow a campaign to route calls based on meeting some condition. Campaigns can route calls based on three types of conditions:

- **Scheduled Event**: The campaign routes calls based on the time that the call reaches the company.

  For example, route the call one way if it reaches the company during business hours, and another way if it comes in when after the company is closed.

- **DTMF**: The campaign makes a routing decision based on a customer keypress.

- **Regular Expression**: The campaign makes routing decisions by testing or comparing the value of variables. For example: If (some variable condition) then (route to...)

Adding a menu routing condition

Add all Menu Routing Conditions the same way:

1. Set an action on a node (Figure 9-24).

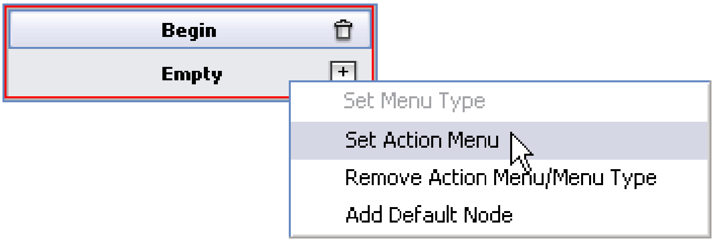


Figure 9-24 Set an Action on a Node

   a. You ***must*** set at least one action on a node before adding a menu routing condition on that node. (See “Adding Actions to Nodes” on page 9-22.)

   b. You ***cannot*** add a menu routing condition on a node that has a Menu Type. A Menu Type is like a termination point that does its own routing. If you are using a Menu Type in a node, there is no point to having a Menu Routing Condition.

2. On the node where you want to add the Menu Routing, click the plus (+) icon (Figure 9-25).

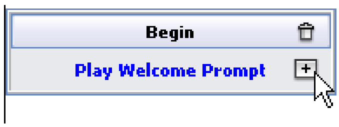


Figure 9-25 Node Plus Icon

3. In the Menu Routing Conditions dialog box (Figure 9-26), select a condition type and then select one or more specific conditions.

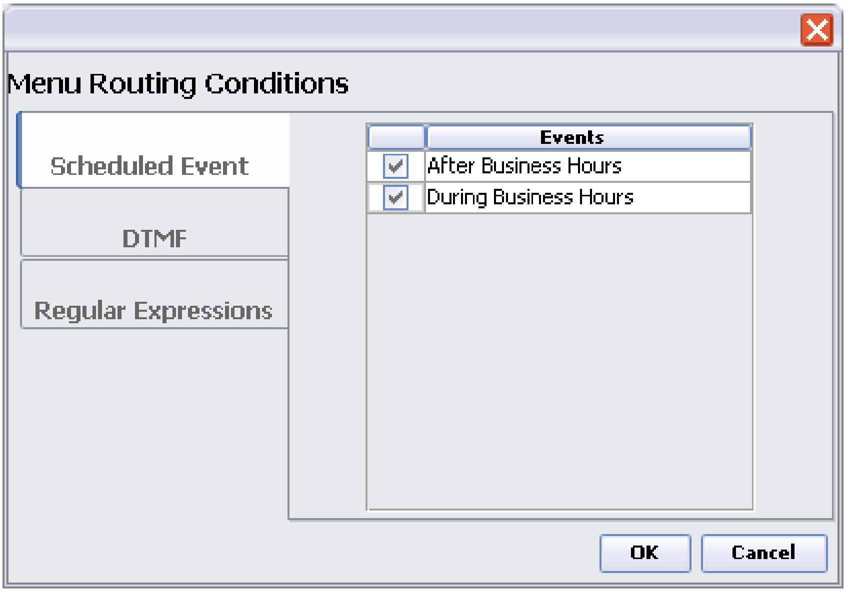


Figure 9-26 Menu Routing Conditions

Menu routing conditions and child nodes

All Menu Routing Conditions create at least two child node:

- One child for each condition to handle
- A Default child node that the campaign executes if none of the other conditions are met.

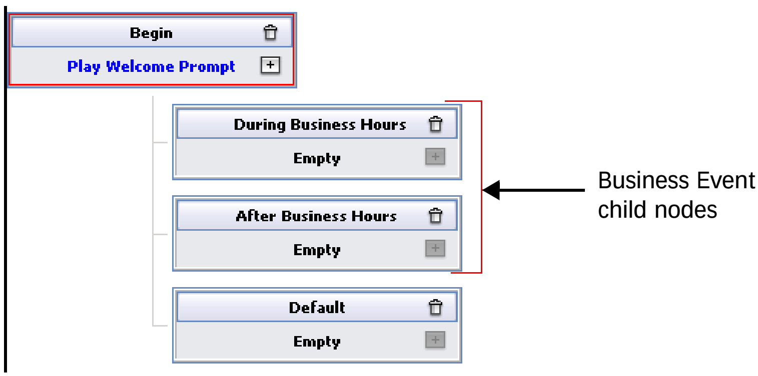


Figure 9-27 Example Business Event Child Nodes

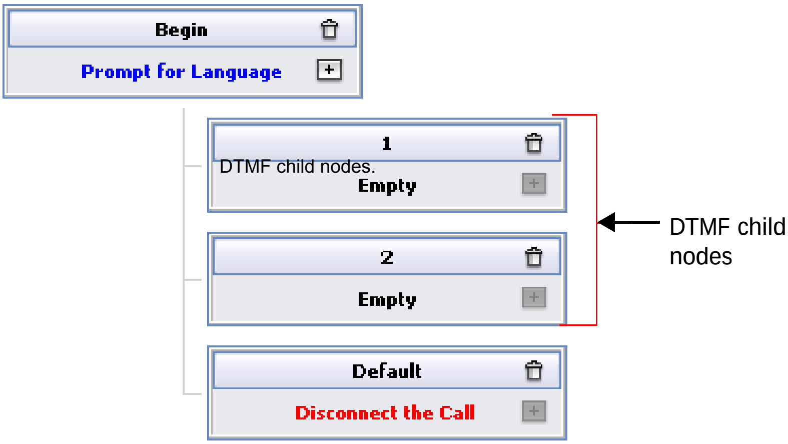


Figure 9-28 Example DTMF Child Nodes

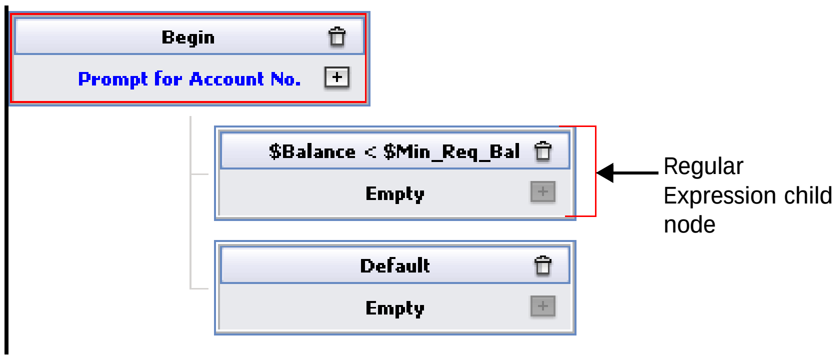


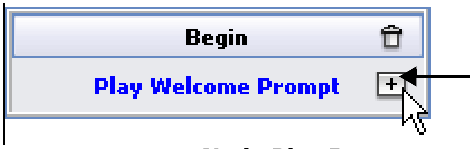
Figure 9-29 Example Regular Expression Child Node

Routing a scheduled event (business event)

1. Create one or more Business Events. (See “Creating CCA Libraries” on page 4-1.)

2. Select a node, which has an existing action.

3. Click the plus () icon of the node (Figure 9-30).



We already used the Action Menu to add a Play Prompt action on this mode.

Figure 9-30 Node Plus Icon

4. In the Menu Routing Conditions dialog box (Figure 9-31):

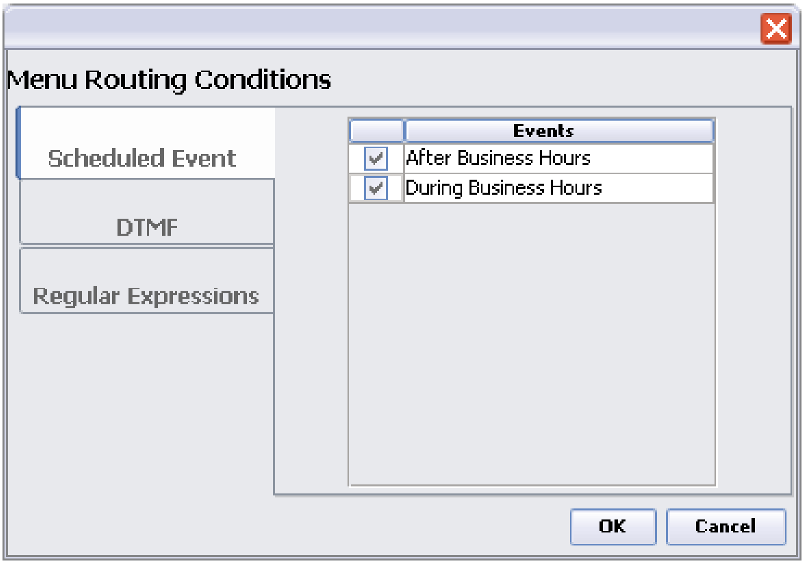


Figure 9-31 Menu Routing Conditions

a. Select **Scheduled Event**.

b. Then, select one or more of the existing **Events**.

c. Click the **OK** button.

The Main Campaign window (Figure 9-32) appears.

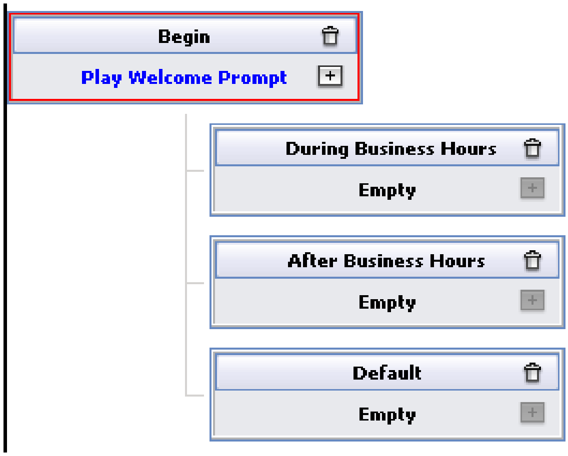


Figure 9-32

5. One child node exists for each Business Event selected (Figure 9-33), plus a default node to handle unexpected conditions.

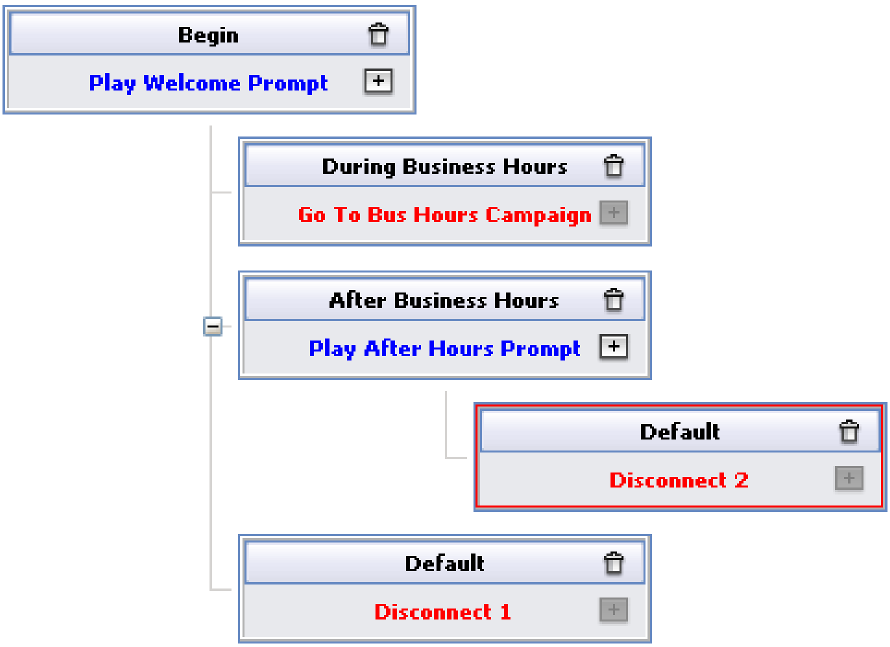


Figure 9-33 Child Nodes and Default Nodes

Normally, now select each node and set either:

- A Menu Type (see page 9-18) to route the call to some feature (such as another campaign)

or

- An action (or several actions) and possibly some more Menu Routing Conditions.

Business Event Routing Logic

When routing to a Business Event child node, the campaign executes the first child node where the condition is “TRUE.” In Figure 9-33, if the customer calls during business hours, the campaign executes the “During Business Hours” node. However, if someone made a mistake in the hours when creating the Business Events, and a customer calls between 4:00 pm and 5:00 pm, the campaign considers the time both during business hours and after business hours. In this case, the campaign executes the “During Business Hours” node, because it is the first child node whose condition was met.

Routing a DTMF (customer keypress)

1. Use the **Action Menu** (Figure 9-34) to add a **Get DTMF** action to a node. (See “To add an action to a node” on page 9-22.)

   Usually the node uses a **Play Prompt** action (page 9-25) to ask the caller to make a selection by pressing a key, and then traps the caller’s keypress using the **Get DTMF** action (page 9-30).

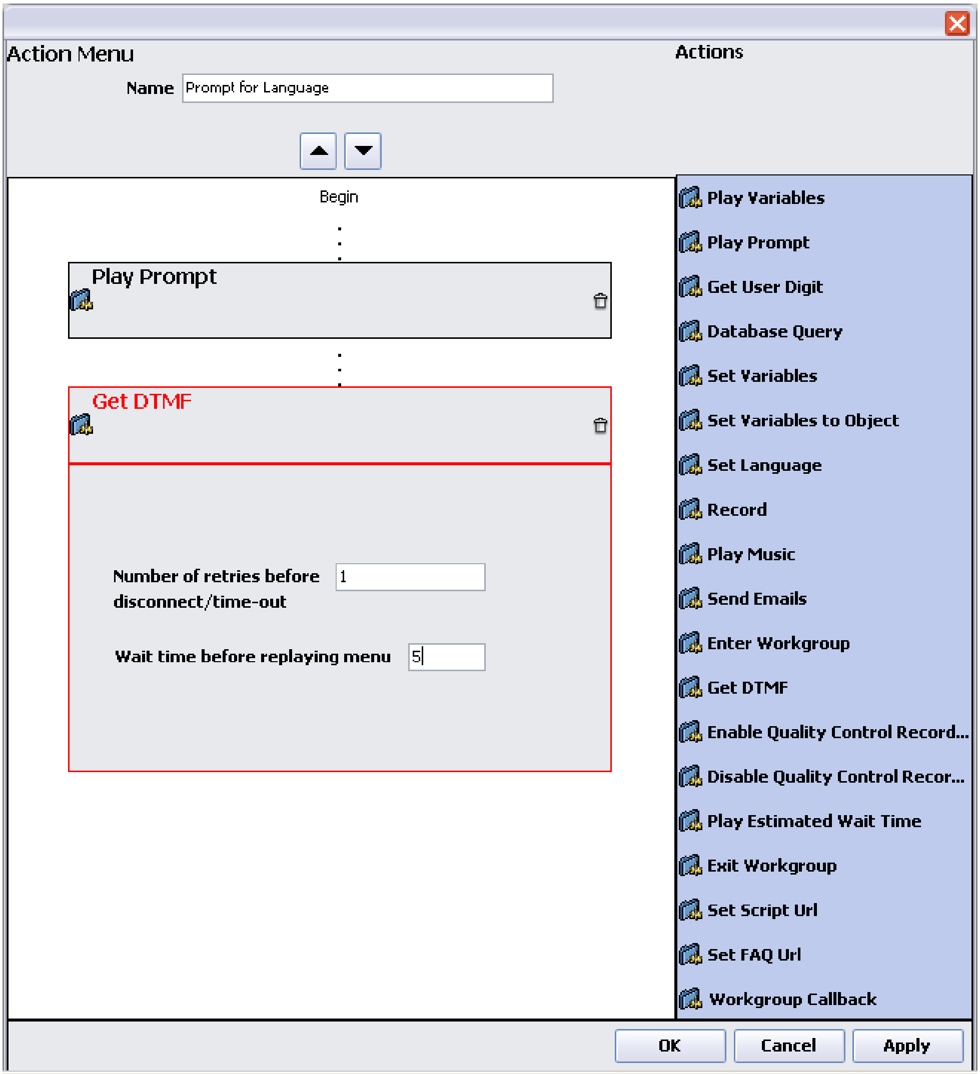


Figure 9-34 Action Menu

2. Click the plus () icon of the node (Figure 9-35).

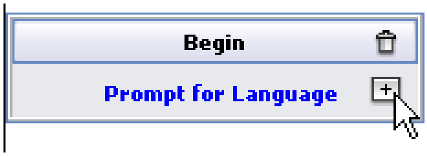


Figure 9-35 Plus Icon

3. In the Menu Routing Conditions dialog box (Figure 9-36):

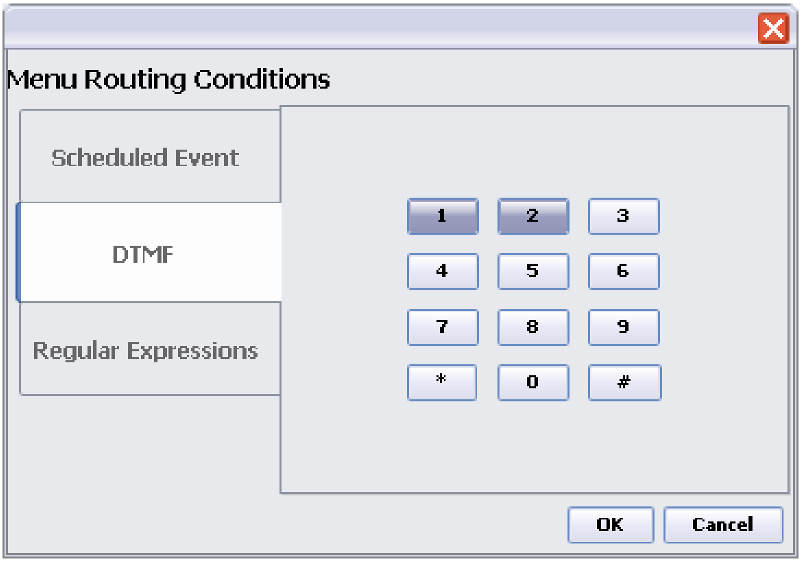


Figure 9-36 Menu Routing Conditions

a. Select **DTMF** and click one or more of the keypress buttons (**1**, **2**, **3**, and so on).

b. Click **OK**.

The Main Campaign window (Figure 9-37) appears.

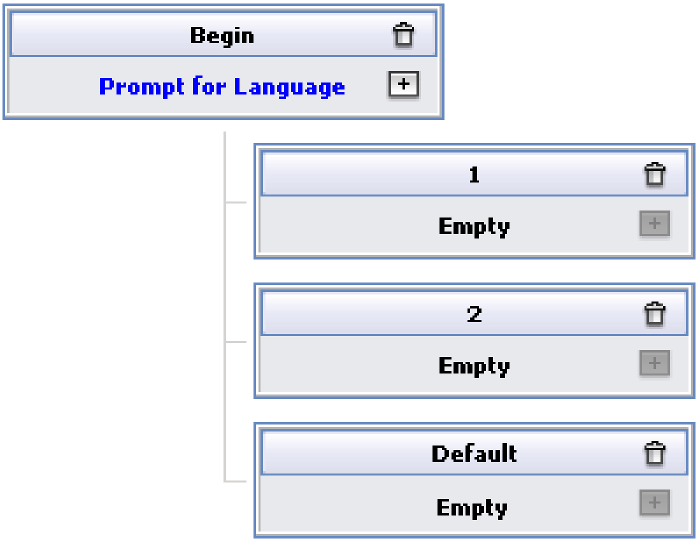


Figure 9-37 Main Campaign Window

4. One child node exists for each DTMF keypress selected, plus a default node to handle unexpected conditions.

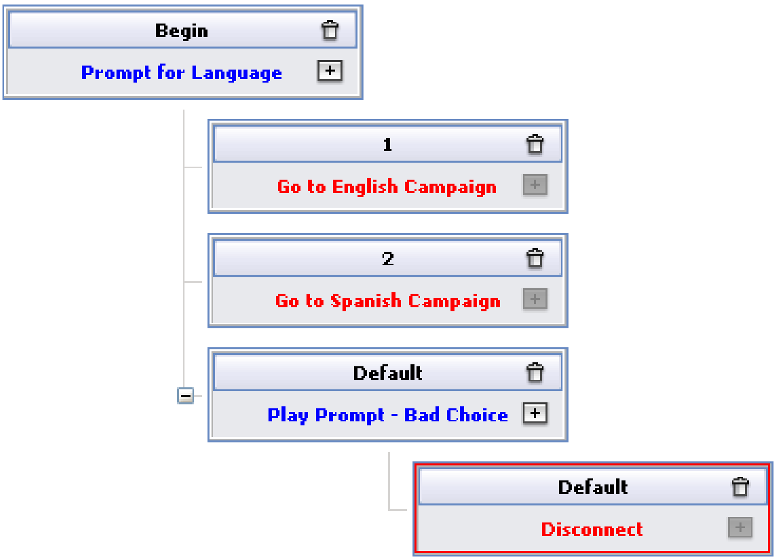


Figure 9-38 Child Nodes and Default Nodes

c. Normally, select each node and set either:

- A Menu Type (see page 9-18) to route the call to some feature (such as another campaign)

or

- An action (or several actions) and possibly some more Menu Routing Conditions.

DTMF Routing Logic

- Figure 9-22 on page 9-34 shows the details of how a campaign executes a node containing a Get DTMF action and how a campaign selects a DTMF child node.
- Find more about the Get DTMF action on page 9-30.
- The tutorial section includes an example of setting up DTMF routing in a Campaign, starting on page 9-14.

Routing a regular expression

1. Select a node which has an existing action.
2. Click the plus () icon of the node (Figure 9-39).

We already used the Action Menu to add a Play Prompt action on this mode.

Figure 9-39 Plus Node

3. In the Menu Routing Conditions dialog box (Figure 9-40):

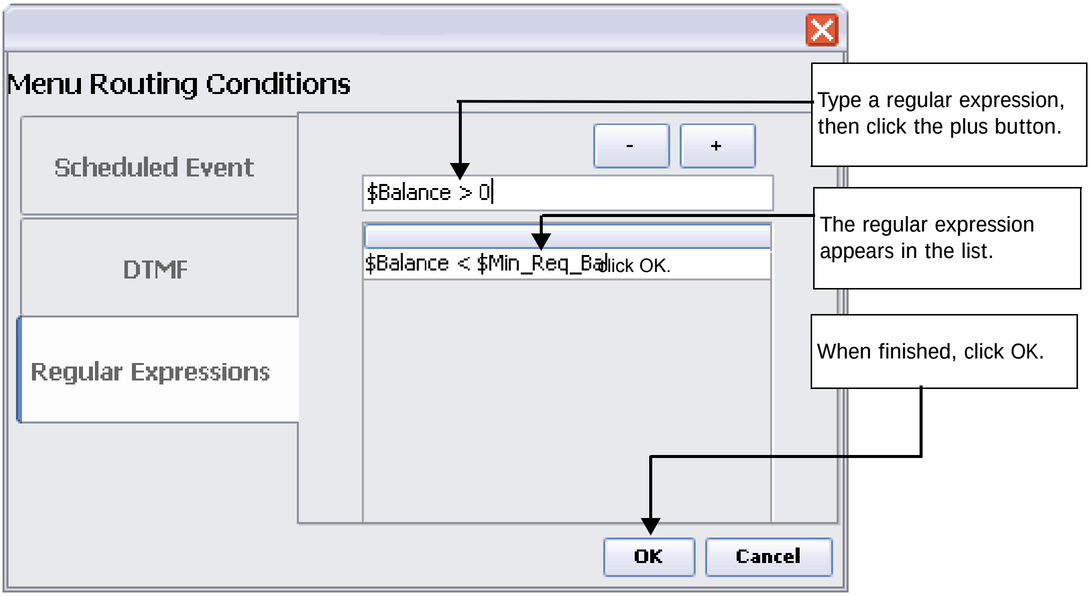


Figure 9-40 Menu Routing Conditions

a. Select **Regular Expression**.

i. Type a regular expression in the text box and then click the plus (**+**) button to add it to the list.

ii. Enter as many regular expressions as desired. Every regular expression you add creates one child node.

iii. Regular expressions can use system variables, variables you created or assigned in some other location in the campaign, and new variables. Entering a variable here for the first time creates the variable.

iv. The regular expression can use any of the CCA operators. (See page 8-8.)

b. Click **OK**.

4. In the main Campaign window (Figure 9-41), one child node for each regular expression exists, plus a default node to handle unexpected conditions.

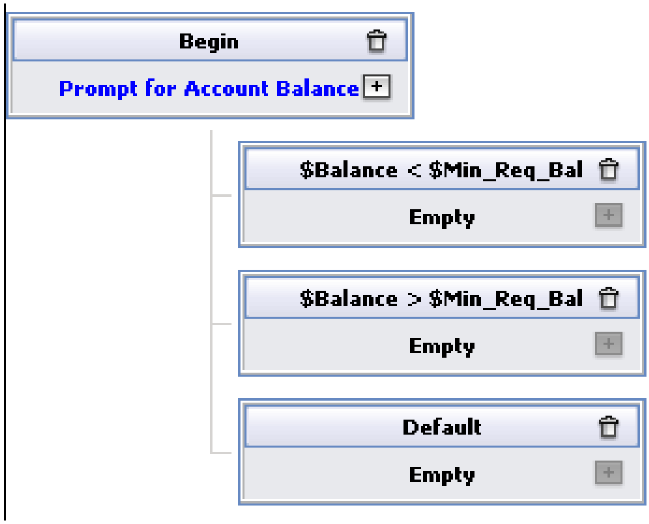


Figure 9-41 Main Campaign Window

Normally, now select each node and set either:

- A Menu Type (see page 9-18) to route the call to some feature (such as another campaign)

or

- An action (or several actions) and possibly some more Menu Routing Conditions.

See Figure 9-42.

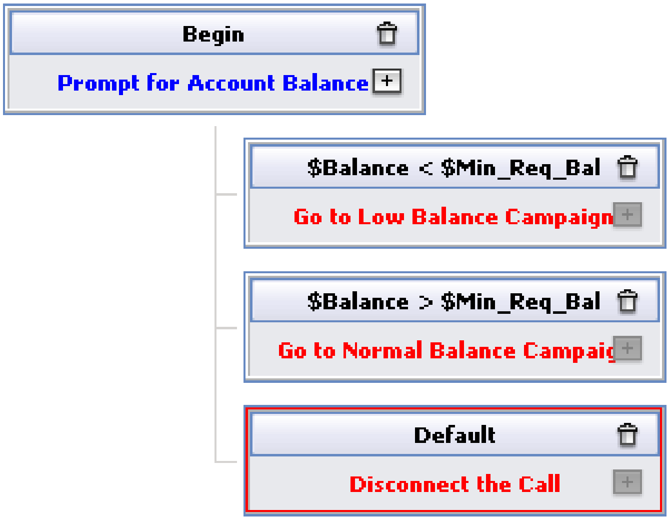


Figure 9-42 Example: Menu Types and Actions

Regular Expression Routing Logic

- Routing goes to the first child node whose regular expression evaluated to “1.”
- If none of the regular expression child nodes evaluate to “1,” the campaign executes the default node.
- If the default node was deleted, the campaign uses the system error routing. See “Changing the Campaign Settings” on page 9-56.

Deleting Nodes

- You can delete any node ***except*** the Begin node.
- When deleting a node, the campaign deletes all of the child nodes.

To delete a node

1. Click the trash can ( ) icon in the top right corner of the node. A confirmation message appears.
2. Click **Yes** to delete the node and all of its children.

Adding Child Nodes

There are three ways to add child nodes:

1. Setting an action on a node automatically creates a child default node (Figure 9-43). (See “Adding Actions to Nodes” on page 9-22.)

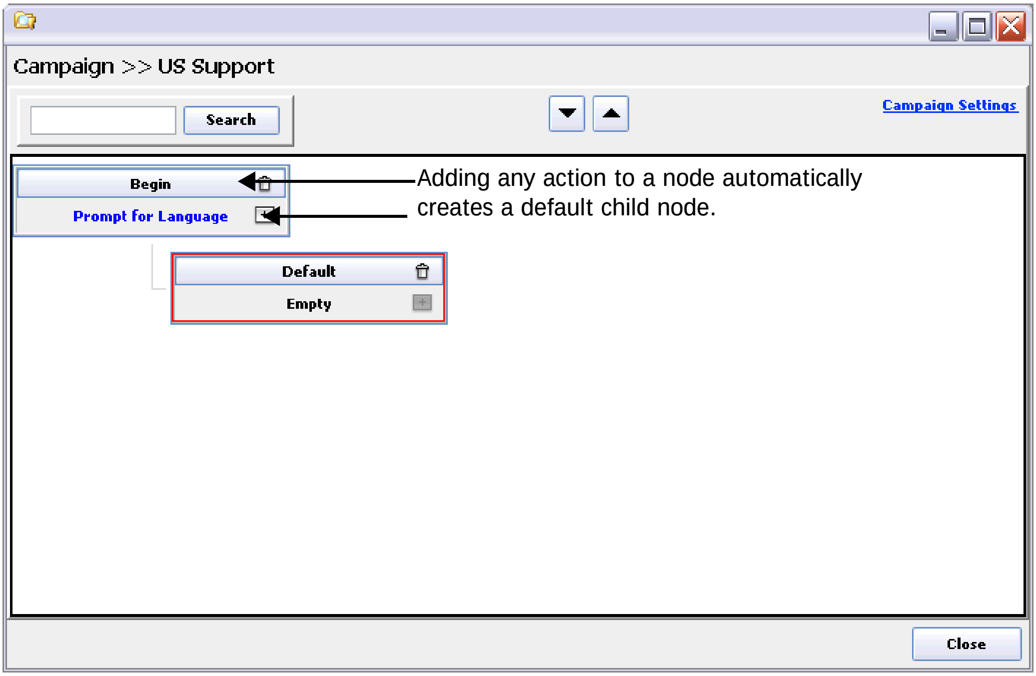


Figure 9-43 Adding an Action

2. If a parent node already has an action, but the default node was deleted, replace the default node by right-clicking on the parent and choosing **Add Default Node** (Figure 9-44).

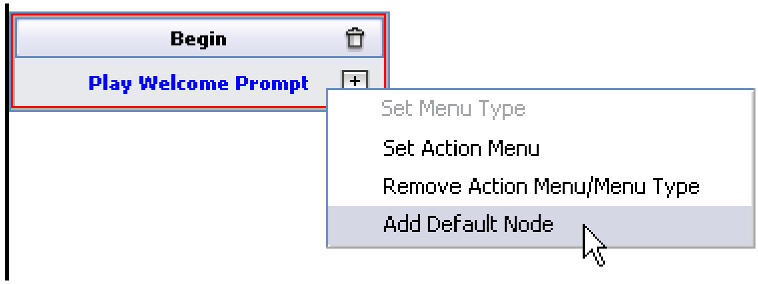


Figure 9-44 Add Default Node

3. Create child nodes by adding Menu Routing Conditions (see page 9-35.) When you add Menu Routing conditions to a node, the campaign creates one child node for each condition, plus a default node (Figure 9-45).

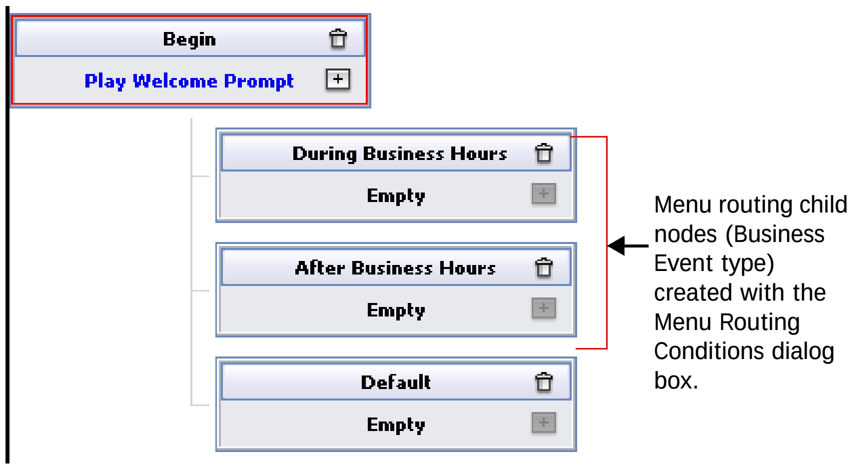


Figure 9-45 Add Menu Routing Conditions

Moving Nodes

The nodes in a campaign are generally executed from top to bottom. To move a node, by select it and then click the up or down arrow at the top of the campaign window.

However, there are several restrictions (Figure 9-46).

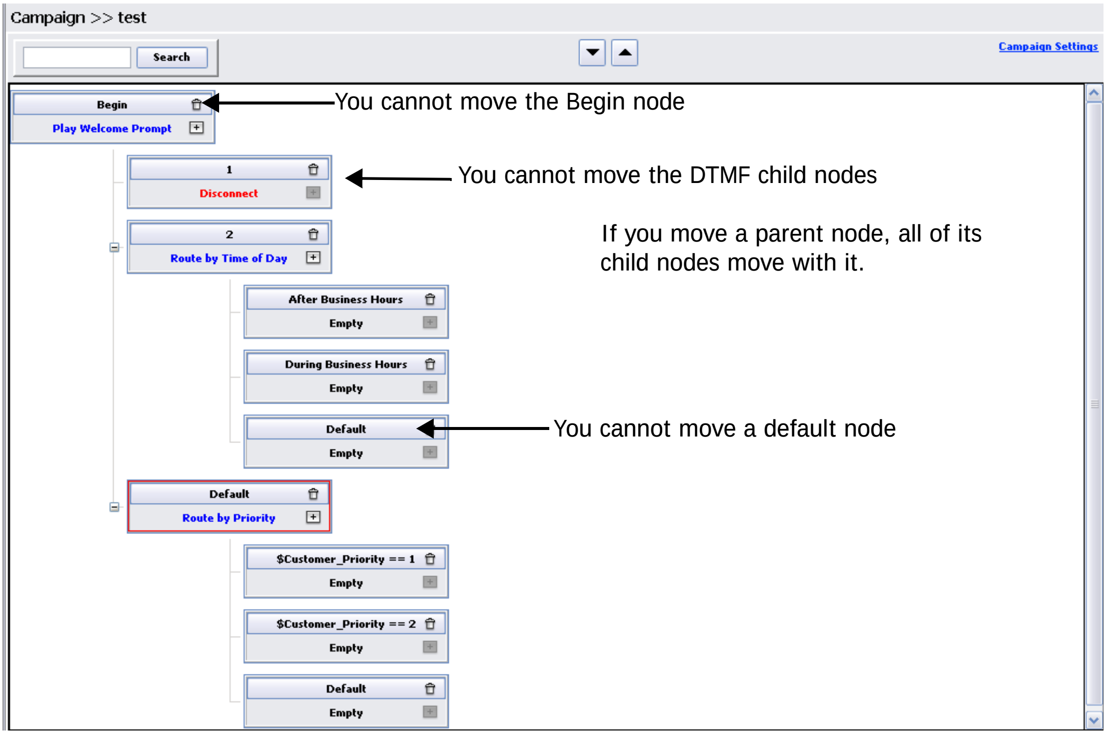


Figure 9-46 Restrictions on Moving Nodes

Searching for a Node

If the campaign is large, locate nodes by searching on their names.

1. Type the node name in the text box in the upper left corner of the campaign window.

In the Campaign window, the node name appears in the lower part of a node. The node name is in blue text for action nodes, and red text for Menu Type nodes.

2. Click the **Search** button.

   If the system finds a node with a matching name, it scrolls the campaign window to the location of that node and highlights the matching node.

Searches are ***case sensitive*** and you can use an asterisk (*****) wildcard when searching.

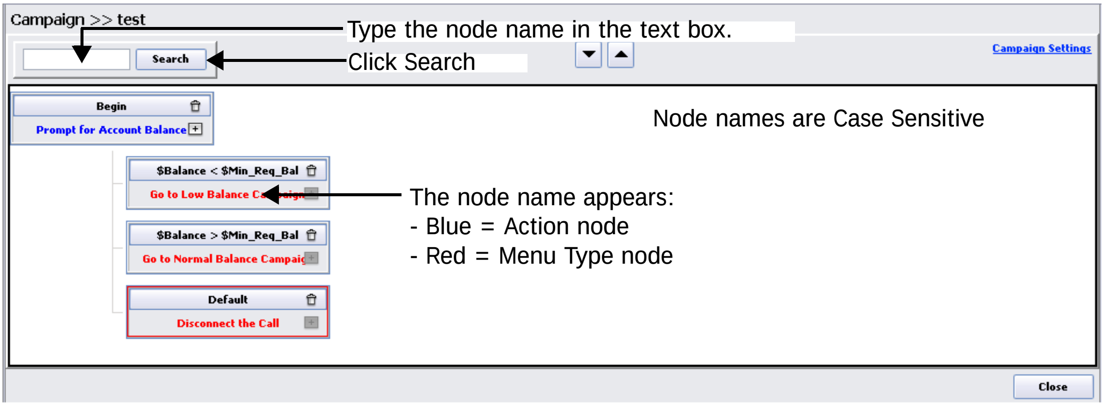


Figure 9-47 Searching for Nodes

Draft Campaigns and Deployed Campaigns

A ***draft*** campaign is like a development version, to experiment with and test without exposing to the outside world.

A ***deployed*** campaign is like a production version, where you take a developed and tested campaign and release it for general use.

Each campaign type has its own icon (Figure 9-48).

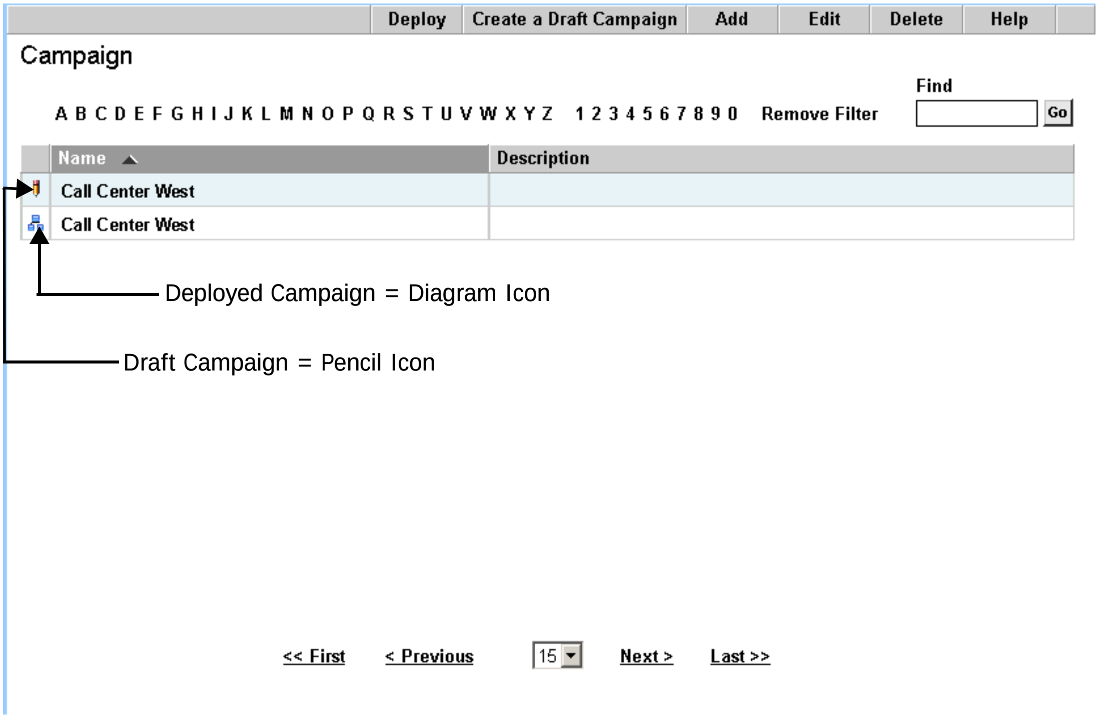


Figure 9-48 Draft and Deployed Campaign Icons

Technically, it is possible to create a draft or a deployed campaign for public use, since the next step is to "connect" the campaign to a project DNIS (see "Now, route to the Campaign from either a Phone Project or a Project Menu:" on page 9-17.)

However, in practice, it is best to connect a draft campaign to a "test" phone number and connect a deployed campaign to a live "commercial" phone number.

Creating a new draft campaign

1. Create a new draft campaign by clicking the **Add** button in the Campaign List window (Figure 9-49).

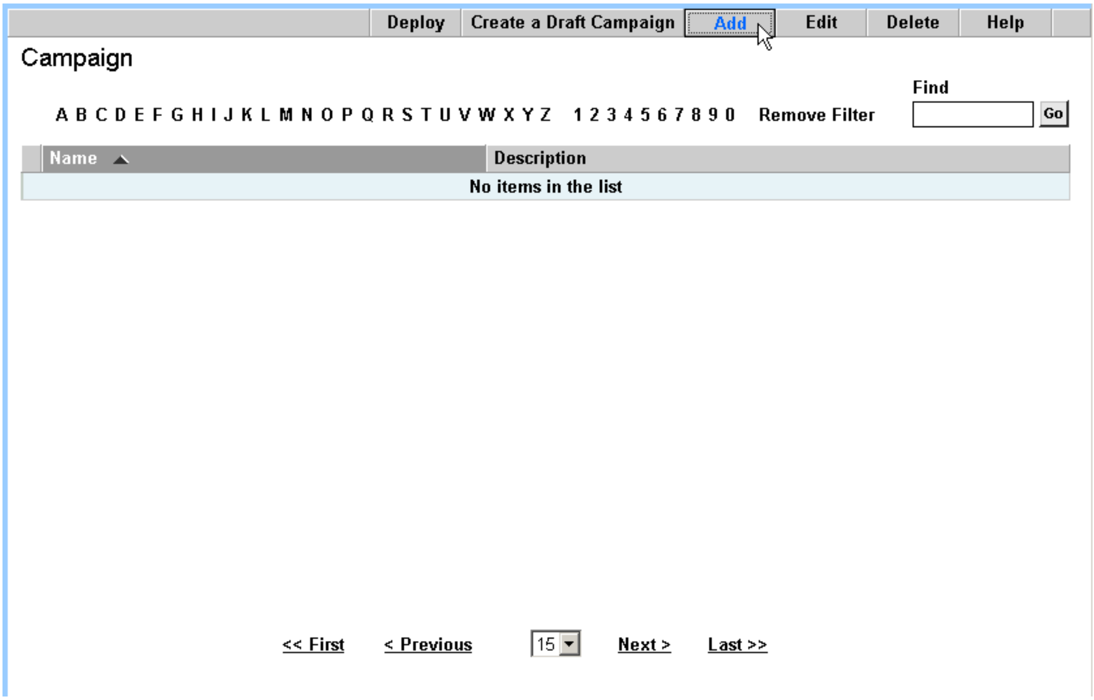


Figure 9-49 Campaign List

CCA creates all new campaigns as drafts.

Deploying a campaign

CCA deploys a campaign by making a complete, separate copy of the draft campaign (with the same name) and then displaying it with the  icon.

CCA does **not** automatically synchronize a draft campaign and a deployed campaign:

- CCA does not automatically apply changes made to an existing draft campaign to the deployed version.
- CCA does not automatically apply changes to the deployed campaign to the draft version.

The draft and deployed versions of a campaign are independent of each other.

Although you can edit either campaign, it is simpler to edit the draft and re-deploy it over and over.

However, if you make changes to your deployed version, you can copy it and “overwrite” the original draft with a new draft version. (See “To create a draft campaign from a deployed campaign” .)

To deploy a campaign for the first time

- Select the draft campaign and click the **Deploy** button.

To re-deploy a campaign

After making changes to a draft campaign, you can “overwrite” an existing deployed version by:

1. Deleting the existing deployed version.
2. Selecting the draft campaign and clicking the **Deploy** button.

You must delete the existing deployed version first.

To create a draft campaign from a deployed campaign

If you have made changes to a deployed Campaign and want to “overwrite” an existing draft version:

- Delete the existing draft version.
- Select the deployed Campaign and click the **Create a Draft Campaign** button.

You must first delete the existing draft version.

Changing the Campaign Settings

When creating a new campaign, the New Campaign Wizard requires some default options. However, you can modify these settings at any time by clicking on the **Campaign Settings** link (Figure 9-50), in the top right corner of the screen.

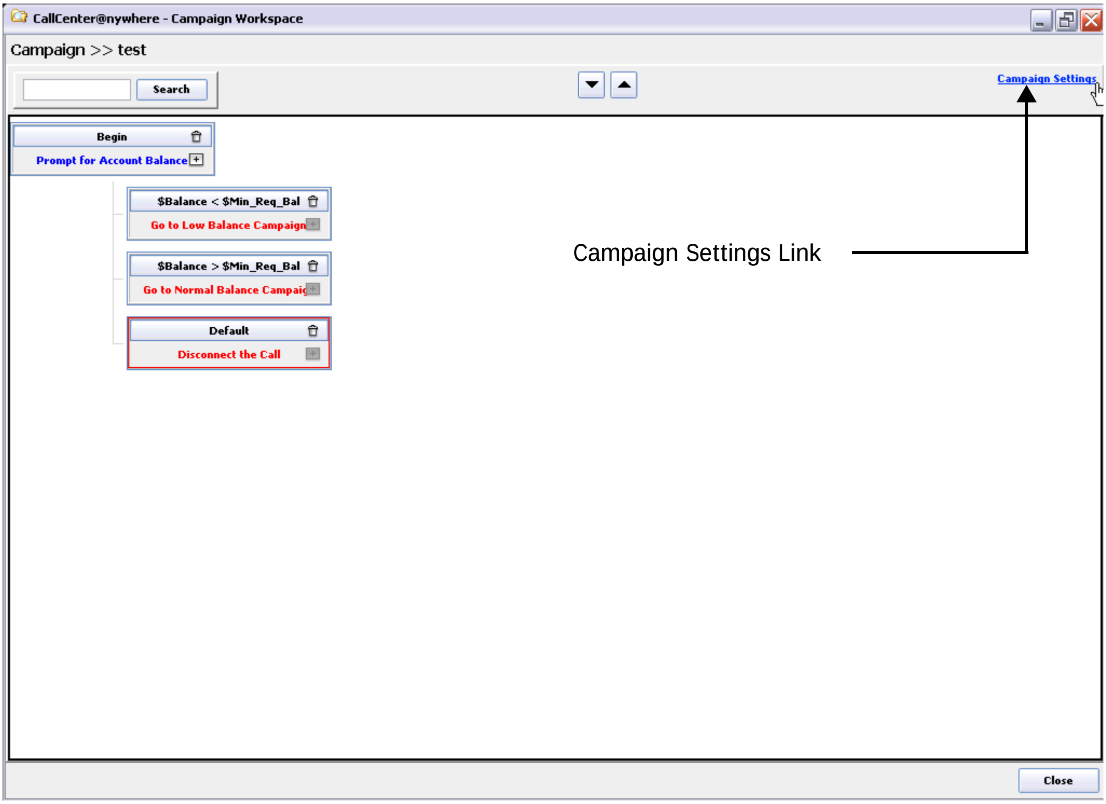


Figure 9-50 Campaign Setting Link

Table 9-4 provides the Items and Descriptions in the General tab of the Campaign Settings screen.

Table 9-4. Campaign Settings - General Tab

Item	Description
Name	The name of the campaign appears anywhere from which you can select the campaign.

Table 9-4. Campaign Settings - General Tab

Item	Description
Description	The campaign description only appears in the main screen showing the list of all campaigns.

Table 9-5. Campaign Settings - Advanced Tab

Item	Description
In Case of Any System Error, Go To:	From the drop-down menu, select a routing action for the campaign to take when a system error occurs. A system error occurs when the campaign cannot take any other routing action. For example, if one node is configured to route to another node, and the second node was deleted, a system error occurs and the campaign executes the routing action you select here. Route system errors to one of the following areas: • Workgroup • Workgroup Voicemail • User • User Voicemail • Disconnect
Allow Type Ahead	Select this option if you have a node (anywhere in the campaign) that plays a prompt and then traps the user's keypress with a **Get User Digit** or **Get DTMF** action. This option allows the user to enter a response without listening to the entire prompt. • See "Get User Digit" on page 9-26. • See "Get DTMF" on page 9-30.
Enter Digit Timeout	Type the time to wait between key presses. (This applies to any place in your campaign where the customer must enter multiple key presses.) When the timeout is reached, the campaign moves on to the next action (which could be validating the customer's entry, making a routing decision, and do on).

Variables in Campaigns

The rules and requirements for variables in campaigns are the same as they are for variables in project menus. For more information, see “Using Variables in Menus” on page 8-4.

Using variable reference fields

You can enter a variable name in several places (in both the Menu Types dialog box and the Action dialog box).

Example: In the Menu Type dialog box (Figure 9-51), select the **User Extension** option. Then, select a user’s name or type a variable.

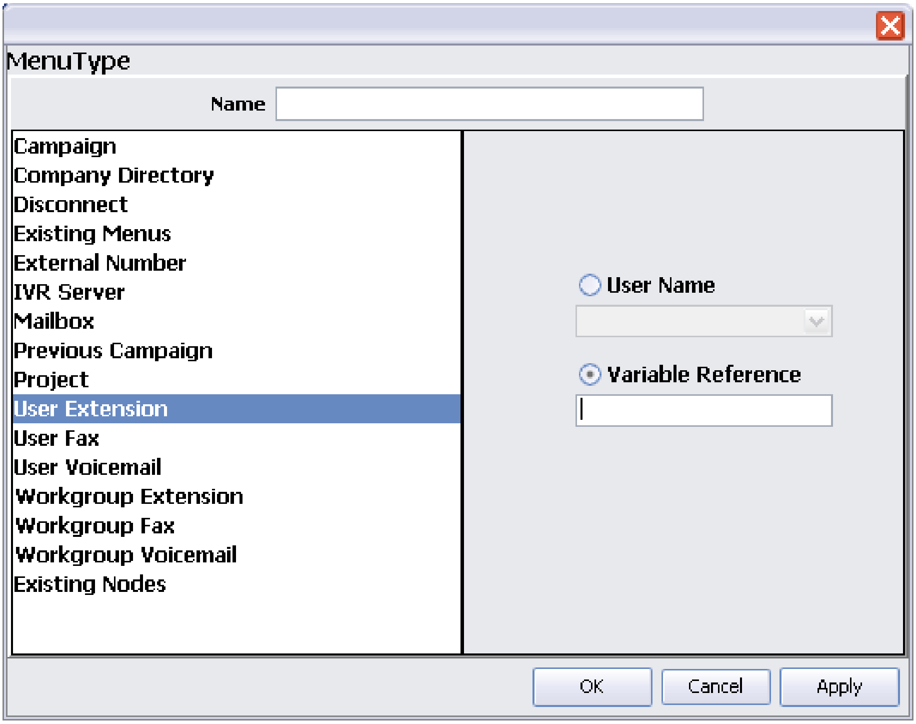


Figure 9-51 Menu Type - Variable Reference Field

Example: In the Action dialog box (Figure 9-52), select the **Play Prompt** option. Then, select a prompt from the drop-down menu or type a variable.

Figure 9-52 Action > Play Prompt > Prompt or Variable

There are many other Menu Type and Action options that work the same. What is not obvious is that, when typing a variable in a “Variable Reference” field, the system expects the variable to have an **internal ID number** (not the name of a prompt or a Workgroup).

For example: In the CCA database, all prompts have a unique identifier. If you have a prompt called “Play_Welcome.wav,” the ID of that prompt in the database might be 71.

So, when you put a variable in the Variable Reference field of the Play Prompt action, the system expects the variable to have the ID of the prompt (71), not the prompt name (Play_Welcome.wav).

Use the Set Variable to Object Action Before Entering a Variable in a Variable Reference Field

Find the internal ID of a workgroup, user, or prompt using the Set Variable to Object Action. Then assign the internal ID to a variable. Next, type the variable name in any Variable Reference field.

Example 1: Using Set Variable to Object with a Menu Type

In this example, set up a variable to route from a campaign node to a workgroup:

1. Select a node and add a **Set Variable to Object** action (Figure 9-53).

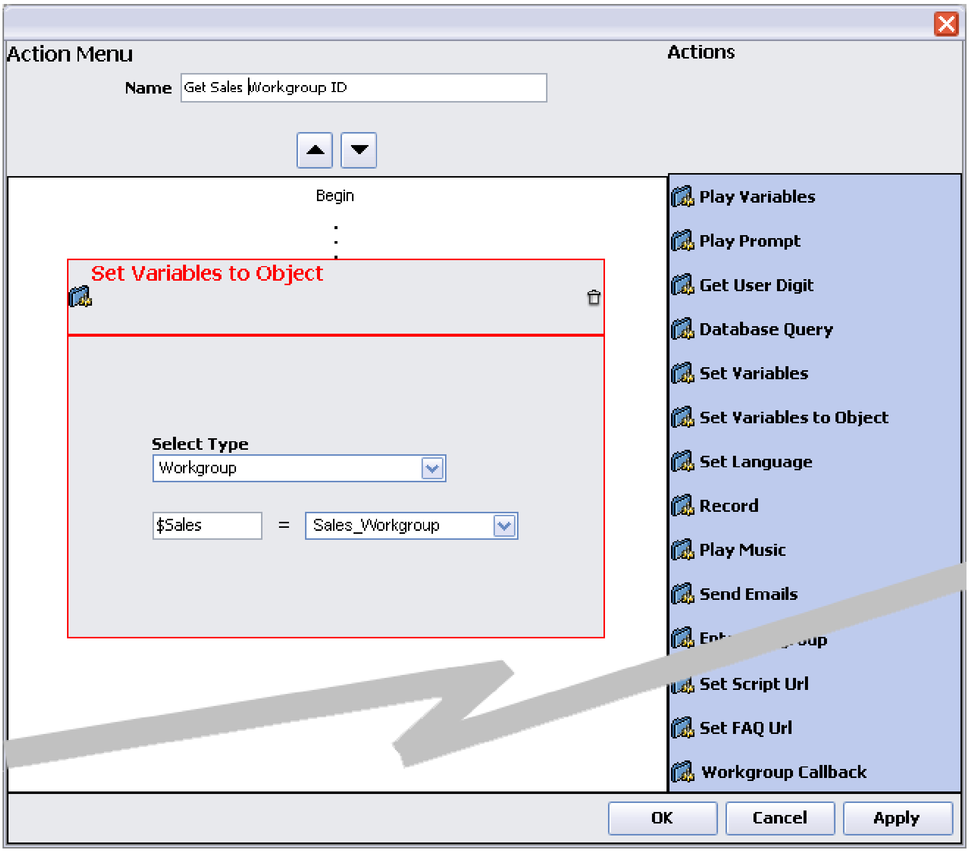


Figure 9-53 Select Node and Add Set Variable to Object

In Figure 9-53, we created a variable called **$Sales** and gave it the internal ID of the Workgroup "Sales_Workgroup."

The Campaign window now looks like Figure 9-54:

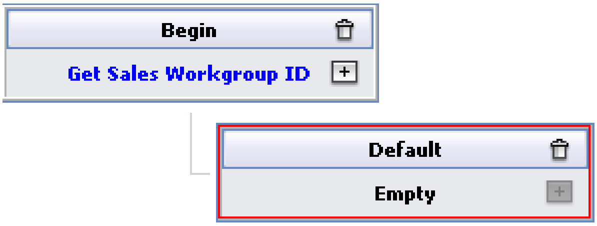


Figure 9-54 Example Campaign Window

We added a Set Variable to Object action in the Begin node, but we could have done it in any node. Since we added an action to a node, the system also created a default child node.

2. Right-click the default child node and choose **Set Menu Type** (Figure 9-55).

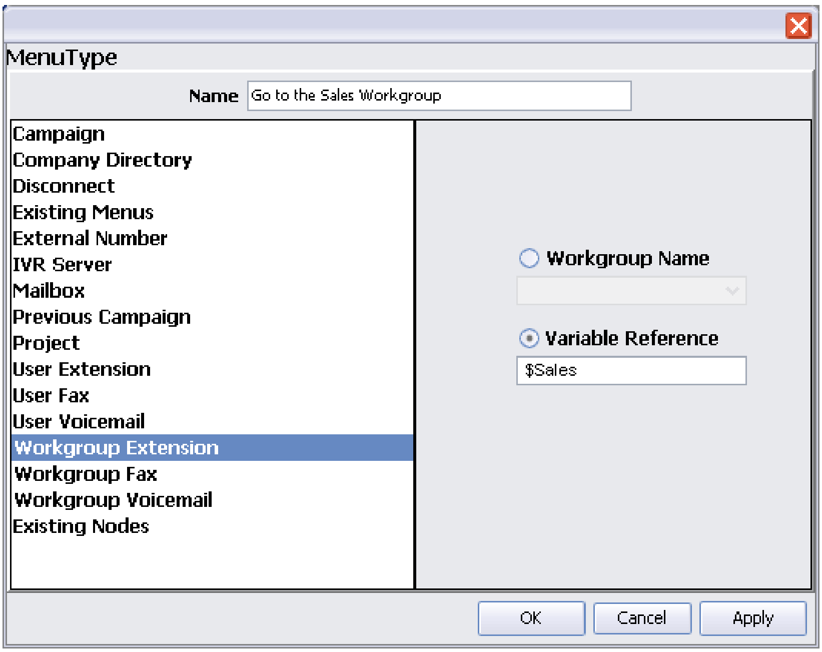


Figure 9-55 Set Menu Type

3. In the Menu Type dialog box:

   a. Select **Workgroup Extension**.

   b. In the Variable Reference field, type **$Sales**.

   The Campaign window now looks like Figure 9-56:

Figure 9-56 Example Campaign Window

Example 2: Using Set Variable to Object with Another Action

Many actions have a Variable Reference field. As in the previous example:

First, use the Set Variable to Object action to initialize the variable.

Second, use that variable in any other action.

1. Select a node and add two actions (Figure 9-57):

   a. A **Set Variable to Object** action.

   b. An **Enter Workgroup** action.

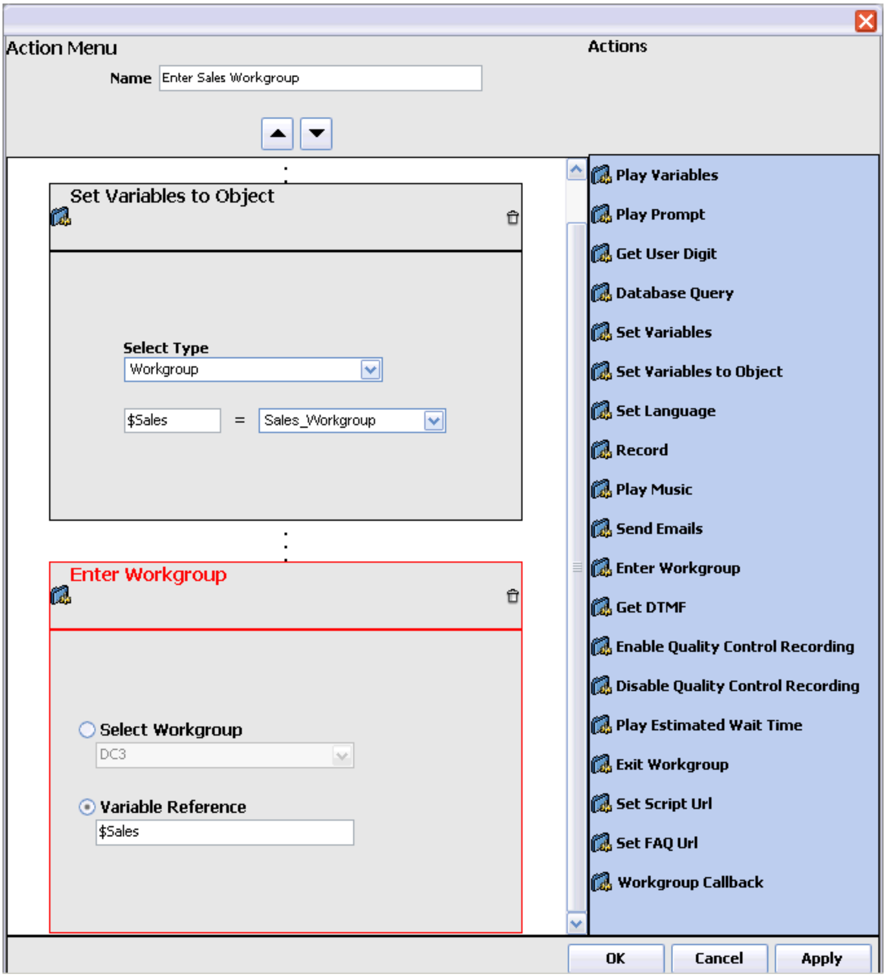


Figure 9-57 Set Variable to Object > Enter Workgroup

2. Set variable to object action to find the internal ID of a workgroup and assign it to a variable (**$Sales**).

3. Then, enter the **$Sales** variable into the Variable Reference field of the Enter Workgroup action.

4. After initializing a variable using Set Variable to Object, use that variable in any Variable Reference field.

In this example, both actions are in the same node, but this is not required. The only thing you ***must*** do is make sure to execute the Set Variable to Object action ***before*** entering that variable in a Variable Reference field (meaning initialize variables before using them).

Creating the Campaign Library Objects

These two library objects are used only by campaigns:

1. **Business Events** (for routing a call in a campaign based on the day or time the customer called)
2. **Database Connections** (for running an SQL query from a campaign)

Creating Business Events

CCA uses Business Events only with the campaign feature. If a campaign exists, use a Business Event to route a call based on the day, date, and time the call reached the company.

For example, if a call reaches the company during normal business hours, the campaign can handle the call one way. If the call reaches the company after business hours, the campaign can process the call using a different way.

A Business Event is actually a group of one or more sub-events. For example, in the same Business Event, you could define:

- Weekday business hours.
- Saturday business hours.
- All holiday business hours for the current year.

Think about how to define Business Events while developing campaigns. When adding a Business Event to a campaign, add the entire event so the campaign handles everything in that Business Event the same.

- Follow the instructions below to create Business Events.
- For how to add Business Events to campaigns, see "Menu Routing Conditions" on page 9-35.

To create a Business Event

1. Select **Libraries** > **Business Events** > **Add**. The Add New Business Event screen (Figure 9-58) appears.

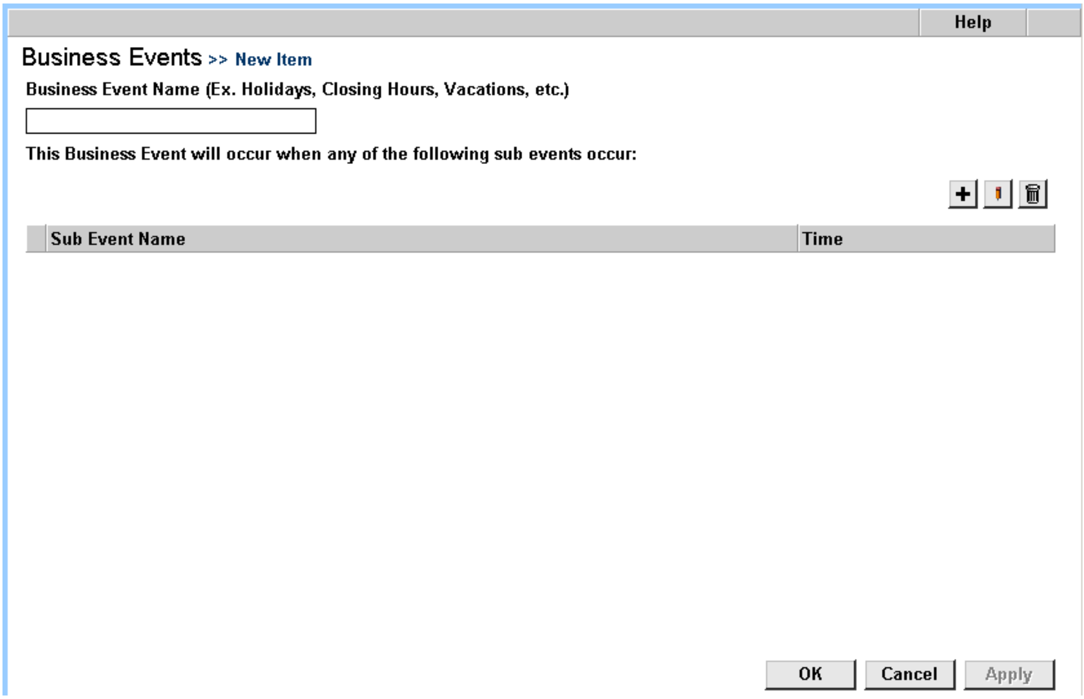


Figure 9-58 Add New Business Event

2. Type a name for the event (such as “Weekday Business Hours” or “Weekday After Hours”).

3. Then, click the plus ( ) icon. The (Add) Define Sub-event dialog box (Figure 9-59) appears.

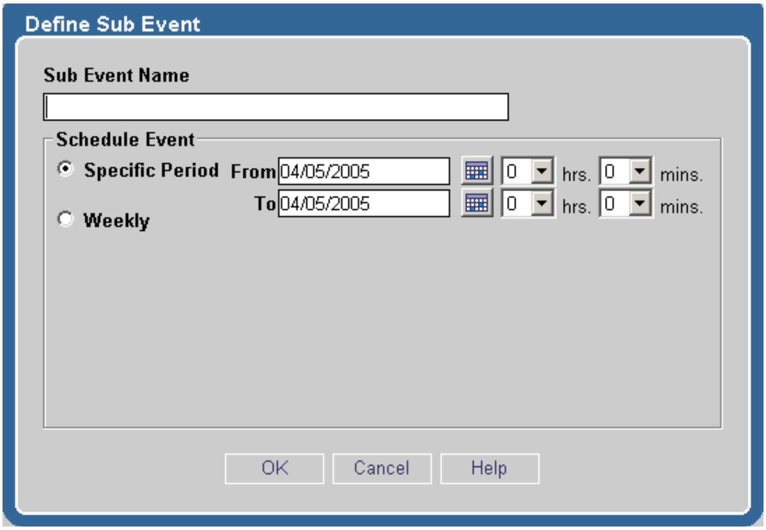


Figure 9-59 Define Sub-Event - Add One Time Sub-Event

4. Type a name for the sub-event.

5. Click the **Specific Period** or **Weekly** button (Figure 9-60).

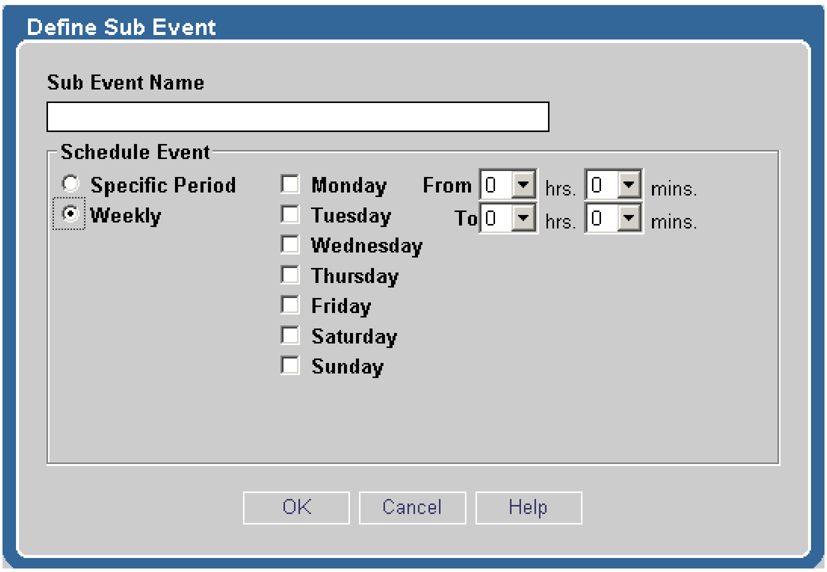


Figure 9-60 Add a Weekly Sub-Event

6. Select the **Specific Period** button to create a one-time event.

   For example, if the company is closed on Memorial Day in 2005, select 05/30/05 in both the **From** and **To** dates, then enter 05/30/05, as shown in Figure 9-61.

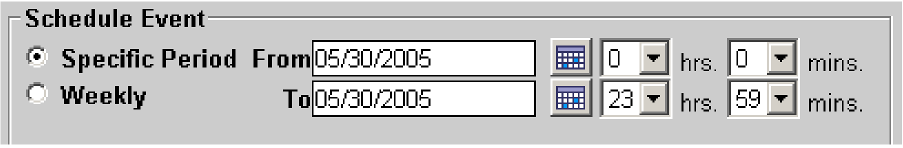


Figure 9-61 Example Specific Period Sub-Event

7. for an event that occurs one or more times per week, and at the same time, select the **Weekly** button.

8. Click the **OK** button.

   a. To edit an existing event, select the event and click the Edit () icon.

   b. To delete an existing event, select the event and click the Trash Can () icon.

9. In the main Business Events screen, add more sub-events or click the **OK** (or **Apply**) button.

Creating Database Connections

CCA uses Database Connections only with campaigns. From a campaign, run an SQL query and trap the result table.

However, before running an SQL query from the campaign, you **must**:

1. (Windows only) Create an ODBC System DSN entry for the database to access. You must create the DSN entry on the machine where the CCA Statistics Server is installed.

2. Create a Database Connection pointing to the System DSN.

3. Select the Database Connection from the **Campaign Action Menu** > **Database Query**.

To create a database connection

1. Select **Libraries** > **Database Connections** > the **Add** button.

   The Add Database Connections screen (Figure 9-62) appears.

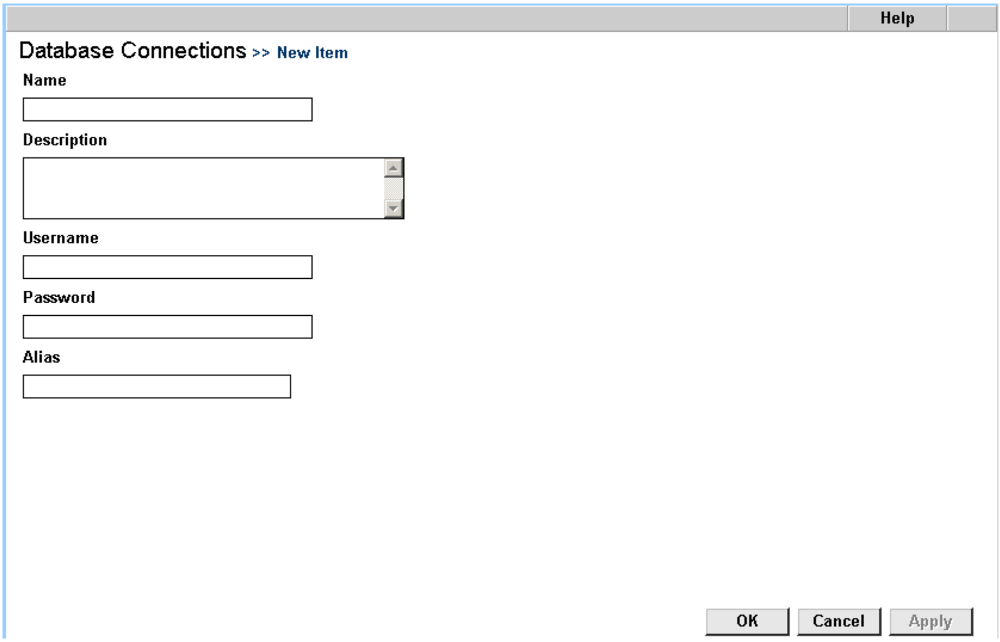


Figure 9-62 Add Database Connections Screen

2. Using the information in Table 9-6, complete the Database Connections screen.

Table 9-6. Database Connections Fields and Descriptions

Field	Description
Name	Type any name for the Database Connection.
Description	Type any description for the Database Connection.
Username	Type the DSN user name.
Password	Type the DSN password.
Alias	Type the data source name.

3. Click **OK** (or **Apply**).

Creating Projects

Create a Project to save a group of settings and attributes for controlling how the call center receives and routes interactions (phone, email, Web chat). To completely customize the way the call center processes different types of interactions, create multiple projects.

The same project can handle one or more interaction types. This chapter shows how to create a project and set it up to handle specific types of interactions.

After creating a project, use Project Scheduling to activate and deactivate projects based on the company's needs or operating hours (see "Setting Up Project Schedules" on page 11-1).

Also refer to "Note About Project Routing and Reporting" on page 15-11.

Creating a Project Definition

Create a project definition, by assigning a project name, providing a description, and choosing the default language the project supports.

To create the project definition

1. Click **Options** > **Projects** > **Add** button.

   The Add Projects screen (Figure 10-1) opens to the General Tab.

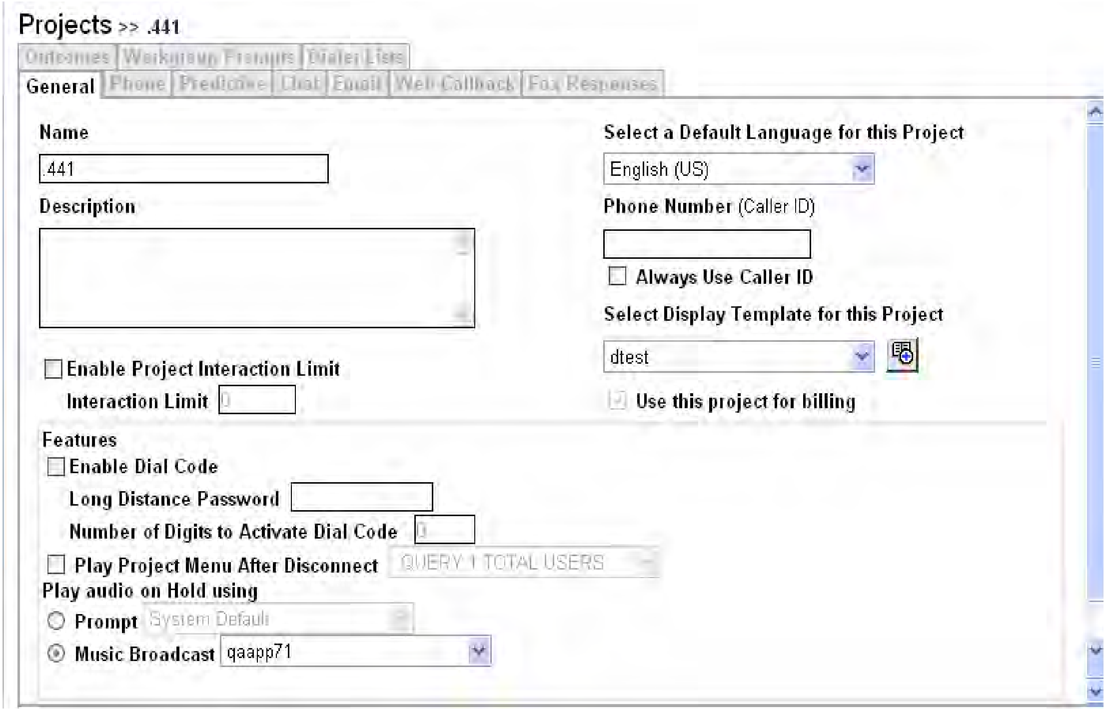


Figure 10-1 Projects Screen: General Tab

2. Complete the Project **Name** fields.

Table 10-1. General Tab Fields and Descriptions

Field	**Description**
Name	Type a name describing the purpose of the project. For example, “Investor Inquiries” might route potential investors to agents ready to answer their questions. “After-Hours” might send callers directly to a greeting informing them that the office is closed.
Description	Type a description of the details of the customers who reach this project, and the strategy for routing customers. **Note**: This text is informational only and does not affect the functioning of the project.

Table 10-1. General Tab Fields and Descriptions

Field	Description
Select a Default Language for this Project	From the drop-down menu, select the language for this project. CCA plays prompts recorded in this language for callers reaching this project. To change the language in which CCA plays prompts, route callers to touch-tone menus or other projects which have an alternate language. • For how to route a caller to a menu and switch the language of the project, see "Menu" on page 8-15. • For how to route a caller to another project, see "Change Project" on page 8-18.
Phone Number (Caller ID)	From the customer's perspective, this is the phone number CCA calls. For example, if the customer has caller ID, the caller ID appears.
Always Use Caller ID	Check to always use the caller's ID as the phone number.
Select Contact Template for this Project	From the drop-down menu, select a Contact Template for this project. Every project uses a template to support features like predictive dialing and auto-assignment. Select the default System Contact Template or create a different template. For how to create a template, see page 4-39. **Note**: Click the display templates icon to view the default templates.
Use this Project for Billing	When checked, the agent can select this project for billing when making an outbound call. When not checked, agent's cannot select this project for billing when making an outbound call and the project does not appear in the IM > Configuration dialog box > General tab > Project Billing list box.

Table 10-1. General Tab Fields and Descriptions

Field	Description
Enable Project Interaction Limit Interaction Limit box	Check this box to enable a limit to the number of calls accepted per project. Then, in the Interaction Limit box, type the maximum number of calls for each project. When the number of calls for the project reaches this limit, CCA plays a busy signal to the caller.
Enable Dial Code	When checked, CCA automatically dials additional digits following the phone number when dialing a long distance number. (These additional digits are the dial code.) **NOTE**: Enable this feature only if the telephone provider (or additional hardware) requires a dial code.
Long Distance Password	Enter a password if the phone system requires a password before connecting a long distance outbound and if you don't want agents or supervisors to enter the password themselves. When the agent or supervisor makes a long distance outbound call, CCA dials the number, enters the password, and then connects the call. **Note**: This field only accepts digits (0-9) and a comma character. (Use the comma character to add a pause before or after the password.)
Number of Digits to Activate Dial Code	Enter the number of digits CCA needs to require a dial code. For example, enter 10 so that CCA knows to require a dial code for all numbers containing 10 digits or higher.
Play Project Menu After Disconnect	If checked, CCA routes the call to a Project Menu after the agent disconnects or hangs up. The agent should remind the caller to stay on the line after the agent disconnects, because, if the caller hangs up, routing is much more difficult. Use this option to route a call to a Project Menu where the caller can take part in a survey or simply offer the caller more routing options after speaking with an agent.

Table 10-1. General Tab Fields and Descriptions

Field	Description
Play Audio on Hold Using Prompt Music Broadcast	Put customers on hold in different ways: The first way: • CCA places a customer on hold while waiting in a workgroup queue. (For how to set this type of hold, see “Select Prompts for this workgroup” on page 7-17). • The agent places a customer on hold after connecting to them. The second way: The customer reached an agent, the agent puts the customer on hold, and then the customer hears: • **Prompt**: From the drop-down, select the System Default prompt or a custom Company Prompt. or • **Music Broadcast**: Check so that the customer hears a streaming music feed while on hold.

3. Click **Apply**.

Adding Phone Interactions to a Project

Phone projects handle incoming telephone-based interactions (phone calls and faxes). When using phone projects, set:

- The telephone number customers use to reach the project
- Where to route the caller who reaches the project
- Verification of the caller’s number
- Which scripts and FAQ content to display for agent’s working on the project

To set up a project to handle phone interactions (calls and faxes)

1. Click **Options** > **Projects**. A list of projects appears.
2. Click the Project to set up and then click **Edit**. The Edit Project screen appears.
3. Click the **Phone** tab (Figure 10-2).

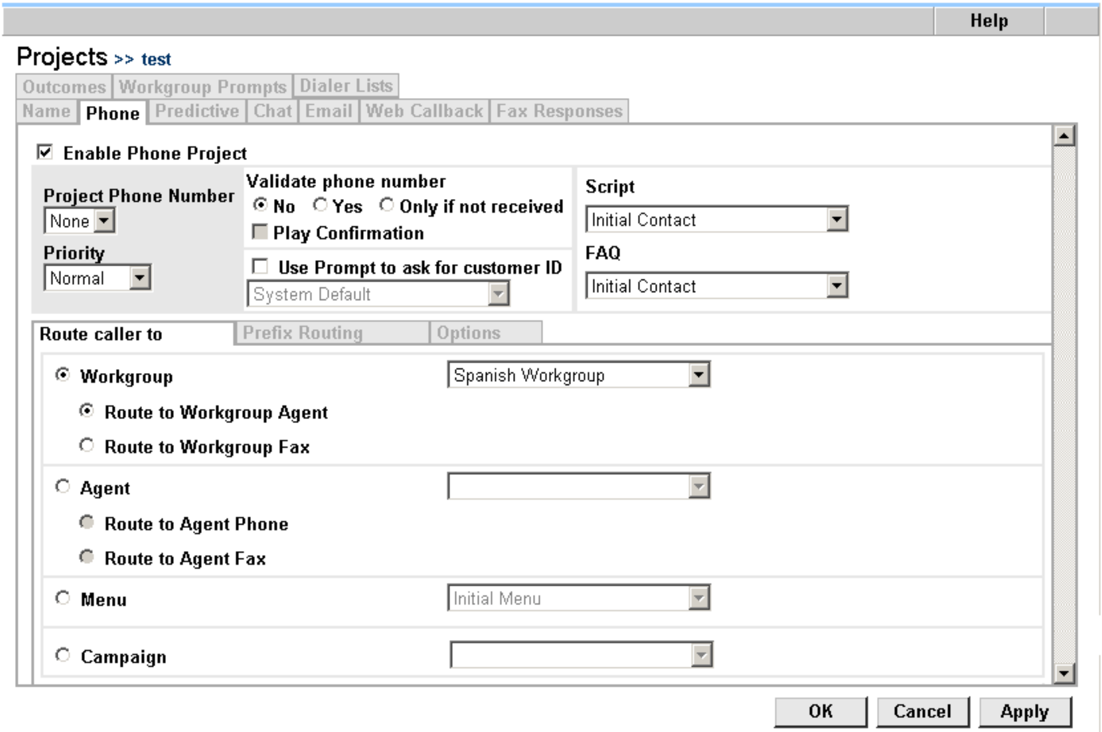


Figure 10-2 Projects Screen: Phone Tab

4. Check **Enable Phone Project**.
5. Use Table 10-2 to complete the fields in the top half of the screen.

Table 10-2. Phone Tab Fields and Descriptions

Field	Description
Project Phone Number	From the drop-down menu, choose (or type) a telephone number for customers to dial to reach this project. ***Service Provider Edition Users***: Clicking the **Project Phone Number** drop-down box shows all phone numbers defined for use in CCA projects by the Network Administrator.

Table 10-2. Phone Tab Fields and Descriptions

Field	Description
	Numbers already in use by other projects do not appear in the list and cannot be selected for use by this project. For how to define Project Phone Numbers for a Company, see "Creating List of Project Phone Numbers" on page 3-22.
Priority	From the drop-down menu, select the priority level to assign to interactions reaching this phone project. (CCA assigns this priority to the interaction ***only*** if Customer Priority is not enabled. For how to enable Customer Priority, see **Use Prompt to ask for customer ID** below). CCA routes High project interactions to an agent before routing Low priority project interactions for the same workgroup
Validate phone number No Yes Only if received	Click **No** and CCA will not prompt the caller for their phone number. Use the validated telephone number to identify the customer for prioritization. (For how to use telephone number information to prioritize customers, see "Identifying Customers for Prioritization" on page 12-4.) Click **Yes** or **Only if not received** so that CCA plays the file (defined for the **entertelno** prompt), which asks the caller to key-in their telephone number. If the customer does not enter any digits or enters fewer than the expected number (as defined in the **ANI Validation Size** option of the Call Center resource in the CCA Network Manager), then CCA interprets the phone number as "not received." CCA drops the call if it is unable to validate the phone number after three attempts by the customer to supply the number. **Note**: For this feature to work correctly, also select **Enable Customer Priority Rating**.

Table 10-2. Phone Tab Fields and Descriptions

Field	Description
Play Confirmation	If Validate Phone Number is checked, then select g Play Confirmation so that CCA plays the customer's phone number back to them.
Use Prompt to ask for customer ID	Check to enable customer prioritization. CCA plays the specified prompt from the Company Prompt Library and requires the customer to enter an ID number. (Use the digits supplied by the caller to identify the customer for prioritization. For how to use Customer ID information to prioritize customers, see "Identifying Customers for Prioritization" on page 12-4.) **Note**: Also enable **Customer Priority Routing** (from the Phone Project Options) for this prompt to work.
Script	From the drop-down menu, select the script to display to agents receiving phone interactions coming into this project. **Note**: If you route the caller to a Menu (see **Play Project Menu After Disconnect** in the General tab, on page 10-4), CCA displays the script specified in the Menu definition. If you specify **None** for the script in the menu definition, CCA does not display a script to the agent (even if a script for the project is specified).
FAQ	From the drop-down menu, choose a list to display to agents receiving phone interactions coming into this project. **Note**: If you route the caller to a Menu (see **Play Project Menu After Disconnect** in the General tab, on page 10-4), CCA displays the FAQ specified in the Menu definition.

Table 10-2. Phone Tab Fields and Descriptions

Field	Description
	Also Note: If you specify None for the FAQ in the menu definition, CCA does not display a FAQ to the Agent, even if you have specified a FAQ for the Project.

6. Click the **Route caller to** subtab (Figure 10-3), if not already selected.

Figure 10-3 Route Caller To Subtab

a. Use the information in Table 10-3 to complete the fields.

Table 10-3. Route Caller To Subtab Fields and Descriptions

Field	Description
Workgroup	Click **Workgroup**, select a workgroup from the drop-down menu (so that CCA routes callers to that workgroup), and then click either: **Route to Workgroup Agent** (so that CCA routes the call to the best available agent working in the workgroup) **Route to Workgroup Fax** (so that CCA routes incoming fax interactions to the best available agent in the workgroup)
Agent	Click **Agent**, select an agent from the drop-down menu (so that CCA routes callers to that agent), and then click either: **Route to Agent Phone** (so that CCA routes the call to the agent's telephone) **Route to Agent Fax** (so that CCA routes incoming fax interactions to the agent's workstation)
Menu	Click **Menu** and then select a menu from the drop-down list (so that CCA routes the caller to that touch-tone menu). **Note**: For how to create touch-tone menus callers can use to navigate the call center, see "Creating Project Menus" on page 8-1.)
Campaign	Check to route a calls to a campaign. **Note**: For more about campaigns, see Chapter 9, "Campaigns".

7. Click the **Prefix Routing** subtab (Figure 10-5), if prefix routing groups exist for the project. (For how to create them, see "Prefix Routing Groups:" on page 4-77.)

    a. Follow the instructions beginning with "Routing Phone Interactions Based on the Caller's Number" on page 10-13.

8. Click the **Options** subtab (Figure 10-4).

Figure 10-4 Options Subtab

a. Use Table 10-4 to complete the Options subtab.

Table 10-4. Options Subtab Fields and Descriptions

Field	Description
Menu played before voicemail	From the drop-down menu, select the menu to trigger before the caller leaves a voicemail for an agent. (This gives the caller a chance to re-enter the call center before leaving a voicemail message.)
Menu played after voicemail	From the drop-down menu, select the menu to trigger after the caller leaves a voicemail for an agent. (This the caller a chance to re-enter the call center after leaving a voicemail message. If you do not specify a menu, after the caller leaves a voicemail message, CCA will disconnect them. **Notes**: CCA plays the menu only for callers who reach an agent's voicemail because the agent did not answer or because the agent intentionally sent the caller to voicemail after accepting the interaction. (Callers who decide leave a voicemail instead of waiting in a workgroup queue do not hear the menu. For more information, see "Allow customer to leave a voicemail" on page 7-16.)

Table 10-4. Options Subtab Fields and Descriptions

Field	Description
	Notes: The drop-down list does not show any selections unless you already created them. (See “Creating Project Menus” on page 8-1.)
Enable Follow Me	Click to play the anotherlocation.wav prompt, which enables the caller to try to reach an agent at their forwarding numbers. (For how to define forwarding numbers for an agent, see “Activate Follow Me” on page 6-18.) **Note**: If Follow Me numbers for the agent do not exist, CCA routes the caller directly to the agent’s voicemail.
Enable Customer Priority Rating	Click so that CCA uses Customer Priorities in this project. (To create customer priorities, see “Customer Priority” on page 12-1). The customer priority can change how long the customer spends waiting to reach an agent. CCA routes customers with higher priority to agents before lower priority customers (even if the lower priority customer reached the call center first). **Note**: If a customer reaches the call center and they are not in the list, CCA gives the customer the lowest priority by default.
Whisper Prompt to Agent	From the drop-down menu, select the prompt only the agent hears when accepting an incoming call. **Note**: For how to create whisper prompts, see “Customizing Prompts” on page 5-1.
Use Existing Interaction ID	This selection does not appear for every application. (This is a company-specific field which integrates to separate database.)

9. Click **OK**.

Routing Phone Interactions Based on the Caller's Number

By adding Prefix Routing Groups to a project, CCA routes calls based on the caller's phone number.

- See "Creating an Prefix Routing Pattern Library" on page 4-77.
- See "Creating a Prefix Routing Group Library" on page 4-80.

To route a call based on the caller's telephone number

1. Create projects to handle routed calls (see "Creating a Project Definition" on page 10-1 and "Adding Phone Interactions to a Project" on page 10-5).
2. Click **Options** > **Projects > Phone** tab > **Prefix Routing** subtab (Figure 10-5).

Figure 10-5 Projects Screen: Prefix Routing Tab

3. Click **Enable Phone Project** check box. Additional selections appear.
4. In the Name column, check a prefix routing group.
5. In the Projects drop-down menu, select a project.

a. When CCA receives a call matching the Prefix Routing Group, CCA routes the call to the project identified in the drop-down menu.

b. If your project uses more than one Prefix Routing Group, CCA uses the first Routing Group matching the call.

For example: The first Prefix Routing Group matches phone numbers with the pattern **858*** and **619*** and the second Routing Group matches numbers with the pattern **619***. CCA always executes the first Routing Group.

6. Click the **Route caller to** tab.

   Complete the **Route caller to** tab to select a routing action for calls that do not match your Prefix Routing Groups. See Step 5 on page 10-6 for information on completing the **Route Caller to** tab.

7. Click **OK**.

Setting up Shared-Number Phone Projects for Scheduling

Though no two Phone Projects can have the same phone number, you can use the same phone number for different Projects scheduled to run at different times (see “Setting Up Project Schedules” on page 11-1).

In this situation, customers dial the same number at all times, but the scheduled projects route the call differently depending on the time of day or the day of the week on which the call is placed.

Defining shared-number projects for scheduling requires that you supply the true phone number for only one scheduled Project, and that you initially supply **None** (Service Provider Edition users) or a “dummy” phone number (Enterprise Edition users) for the additional Scheduled Projects that share the same number.

To set up shared-number phone projects for scheduling

1. Create a phone project that defines the first routing strategy to schedule and that specifies the phone number customers dial to reach the project.

2. Create additional hone projects that define alternate interaction routing strategies to schedule, but do not supply the actual phone number for the project. Instead, perform a or b (depending upon which edition of CCA you use):

   a. For the ***Service Provider Edition***, select **None** for the phone number.

   b. For the ***Enterprise Edition***, supply a “dummy” phone number (such as, add the **0** digit to the beginning of the phone number in step 1) for these projects.

3. Create schedules to start each of the Projects defined in steps 1 and 2 (see “Setting Up Project Schedules” on page 11-1).

4. When defining the schedules, specify a phone number to replace the “dummy” or empty number while the scheduled project is active.

Adding Predictive Calling to a Project

A Predictive Project makes automated, outgoing calls to customers (or prospective customers) and connects the customer to an agent who has configured their IM to accept predictive interactions.

> Each agent ***must*** provide an outcome for the Predictive Project. Therefore, make sure to update each agent to enable outcome reporting.

From Administration Manager, control the:

- Number of predictive calls to dial simultaneously
- Agent scripts to associate with the project
- Actions to take for each possible predictive call result
- Number of agents to leave available for inbound phone project calls
- Predictive project state (On or Off)

AM support for predictive dialing is powerful and customizable. To get the most out of this section:

- Previously set up other types of projects (such as email, phone, and so on)
- Have a basic understanding of Display Templates (see page 4-38).
- Have a basic understanding of Dialer Lists (see page 10-81).

To set up a predictive project

1. Click **Options > Projects**. A list of project appears.
2. Click a Project to set up and then click **Edit**. The Edit Project screen appears.
3. Select the **Predictive** tab.
4. Click the **Enable Predictive Project** check box. Additional fields appear.
5. Click the **Options** subtab (Figure 10-6).

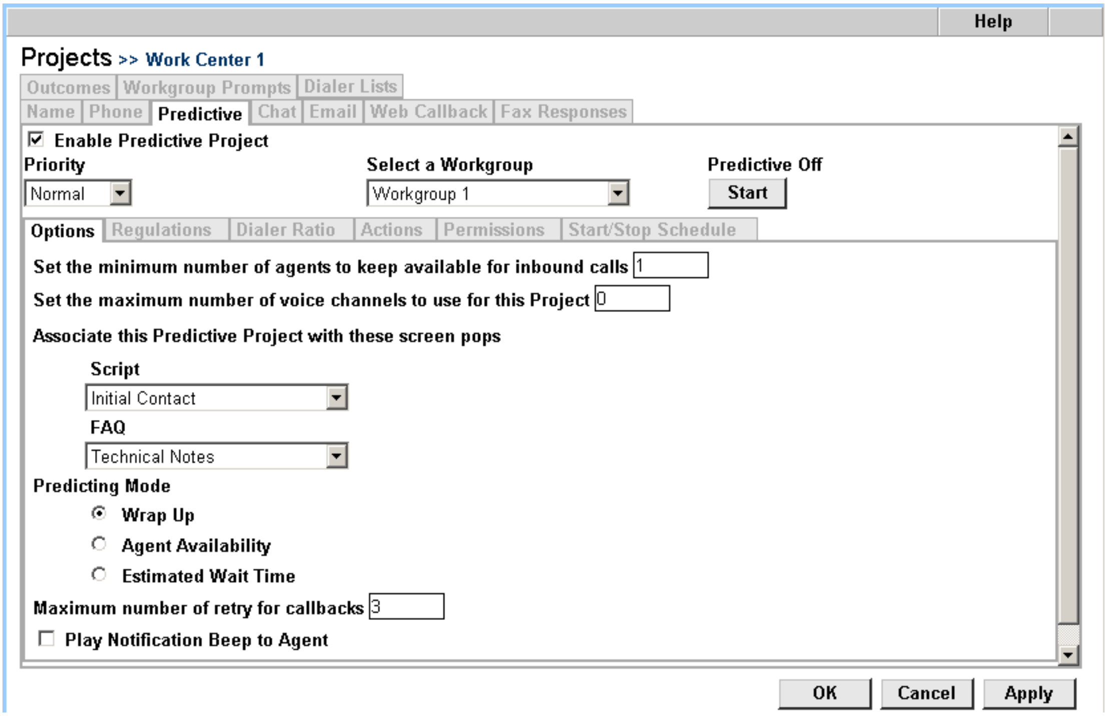


Figure 10-6 Predictive Tab - Options Subtab

6. From the Priority drop-down menu, select the level to assign to interactions reaching this predictive project.

   CCA routes interactions routed to workgroups through a “High” priority project to an agent before routing interactions reaching the same workgroup through a “Low” priority project.

7. From the Select a Workgroup drop-down menu, select the workgroup to handle the predictive calls.

8. Use the information in Table 10-5 to complete the settings in the **Options** subtab.

Table 10-5. Options Subtab Fields and Descriptions

Field	Description
Set the minimum number of agents to keep available for inbound calls.	Type the number of agents that must be available to handle inbound phone project calls before dialing predictive numbers. For example, if you type the number **5** and there are six agents available, CCA “reserves” 5 of the agents for receiving inbound calls. Only 1 agent receives predictive dialer calls.
Set the number of maximum voice channels to use for this project	Type the maximum number of predictive numbers to dial simultaneously. (This number cannot be greater than the number of physical channels that are available for dialing.)
Associate this predictive project with these screen pops Script FAQ	From the Script drop-down menu, select the script content to display on the agent’s screen when successfully connected to a predictive call. From the FAQ drop-down menu, select the FAQ content to display on the agent’s screen when successfully connected to a predictive call.
Predicting Mode	Select one of the following to identify how CCA determines whether to add an agent to the pool of agents who can receive predictive calls: **Wrap Up**: CCA adds the agent to the pool if the agent’s status is “Wrap Up” or “Available.” (This is recommended.) **Agent Availability**: CCA adds the agent to the pool only if the agent’s status is “Available.”

Table 10-5. Options Subtab Fields and Descriptions

Field	Description
	Estimated Wait Time: The Dialer looks at the Estimated Call Handle Time, Wrap up and abandon rate, and then makes calls based on a “forecasted” agent availability rate.
Maximum number of retries for a Callback	Type the number of times that CCA will attempt to reach a contact record that is marked as a callback.
Play Notification Beep to Agent	Check so that agents hear a short beep when they connect to a predictive call.

9. Select the **Regulations** subtab (Figure 10-7).

Figure 10-7 Regulations Subtab

10. Use the information in Table 10-6 to set the ring time and tone detection.

Table 10-6. Regulations Subtab Fields and Descriptions

Field	Description
Set Ring Time	From the drop-down menu, select how long (in seconds) to ring the contact before disconnecting.

Table 10-6. Regulations Subtab Fields and Descriptions

Select Tone Detection	From the drop-down menu, select how long CCA waits (in seconds) to determine whether the call was answered by a person or an answering machine. (CCA determines this by running an algorithm.) **Note**: The more time the algorithm has to work, the less likely CCA will connect agents, by mistake, to an answering machine. However, if the number is too high, a customer answering the phone may have to wait for a second or two before CCA connects them to an agent.

11. Select the **Dialer Ratio** tab (Figure 10-8).

    Dialer ratio is defined as:

$$\frac{\text{Number of predictive calls made for a specified time}}{\text{Number of predictive calls answered in that specified time}}$$

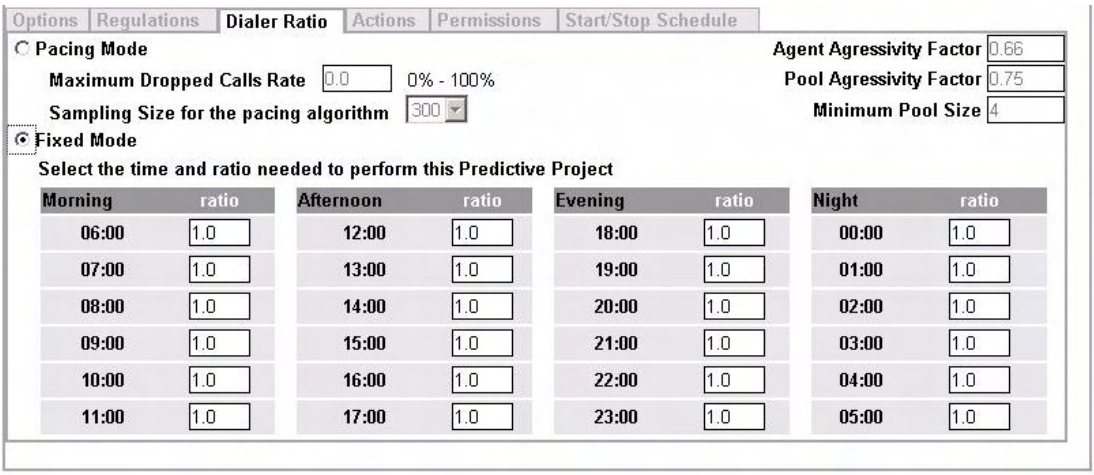


Figure 10-8 Dialer Ratio Subtab

12. Use the information in Table 10-7 to complete the fields.

Table 10-7. Dialer Ratio Subtab Fields and Descriptions

Field	Description
Pacing Mode or Fixed Mode	Select Pacing Mode to dynamically change the rate at which CCA places predictive calls. This rate is based on a number of parameters, such as the failure rate of predictive call attempts and the drop ratio. OR To set a fixed predictive call rate, choose **Fixed Mode**. (See "Fixed Mode" on page 10-22.)
Maximum Dropped Calls Rate	Type the maximum percentage of dropped predictive calls to allow.
Sampling Size for pacing algorithm	From the drop-down menu, select the number of predictive call attempts to consider when adjusting the pacing algorithm. **Note**: A smaller number results in consideration of only the most recent call attempts. A larger number results in consideration of more calls, but some of the least recent calls may not reflect current calling conditions.
Agent Aggressivity Factor	Type an Agent Aggressivity Factor (AAF) number to modify the dialer ratio. For example, if the dialer is using a ratio of **3** and the AAF is set to **0.5**, the dialer can use a new ratio of (3 x 0.5 = **1.5**). The AAF value must be between **0.1** and **10**. The default setting is **0.66**. The AAF works in combination with the Minimum Pool Size (see next field).
Pool Aggressivity Factor	Type a Pool Aggressivity Factor (PAF) number for modifying the dialer ratio. For example, if the dialer is using a ratio of **2** and the PAF is set to **0.5**, the dialer can use a new ratio of (3 x 2 = **6**). The PAF value must be between **0.1** and **10**. The default setting is **0.75**. The PAF works in combination with the Minimum Pool Size (see the next field).

Table 10-7. Dialer Ratio Subtab Fields and Descriptions

Field	Description
Minimum Pool Size	Type the Minimum Pool Size (MPS), which determines whether the dialer ratio is multiplied by the **Agent Aggressivity Factor** or the **Pool Aggressivity Factor**. • If the number of agents who can receive predictive calls is greater than or equal to the Minimum Pool Size, CCA multiplies the dialer ratio by the Pool Aggressivity Factor. • If the number of available agents is less than the Minimum Pool Size, CCA multiplies the dialer ratio by the Agent Aggressivity Factor. The MPS value must be between **0** and **99**. The default setting is **4**.
Fixed Mode	Click to determine the number of predictive call attempts to place based on the number of agents available at each hour of the 24-hour day. Then, type the number of predictive calls to make per available agent during each interval of the day. For example, if the likelihood of a successful predictive call at 12:00 p.m. is very low, enter a large number to increase the chances of a successful predictive call. If the likelihood of successful predictive calls at 7:00 p.m. (19:00) is very high, enter a lower number.

13. Select the **Actions** subtab (Figure 10-9).

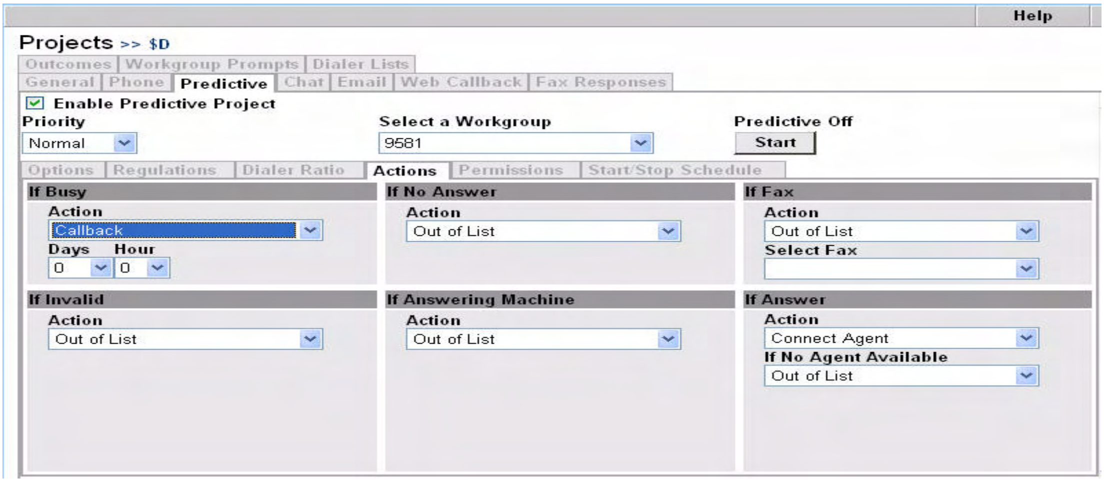


Figure 10-9 Actions Subtab

For each condition (If Busy, If No Answer, and so on) select an action for CCA to take. (Notice that new fields appear after making a selection.)

Not all actions are available for a specific condition. For example, the only actions available for "If Busy" are "Out of List" or "Callback."

---

14. Use the information in Table 10-8 to complete the fields.

Table 10-8. Actions Subtab Fields and Descriptions

Action	Description
Call back	Select to call the number back later. Then, from the drop-down menu (**Days** column), choose the number of days from today to place the call back. From the drop-down menu (**Hour** column), select the time to place the call back.
Call back message	Select to leave the selected message and call the number back later. Then, from the drop-down menu (**Days** column), choose the number of days from today to place the call back. From the drop-down menu (**Hour** column), select the time to place the call back.

Table 10-8. Actions Subtab Fields and Descriptions

Action	Description
Connect Agent	Connect the called number to an Agent. You can also select an action to take if no Agent is available.
Leave message	Select to leave a message. Then, from the drop-down menu, select the message to leave. **Note**: At least one company prompt must exist before using this action. (See “Creating a Company Prompt Library” on page 4-16.)
Out of List	Select to remove the number from the predictive project so CCA will not dial it again.
Route to Project	Select to send the call to a specific project. Then, from the drop-down menu, select a project.
Send Fax	Select to send a fax. Then, from the drop-down menu, select the fax to send. **Note**: At least one fax must exist before using this action. (See “Creating a Fax Library” on page 4-60.)

15. Select the **Permissions** subtab (Figure 10-10).

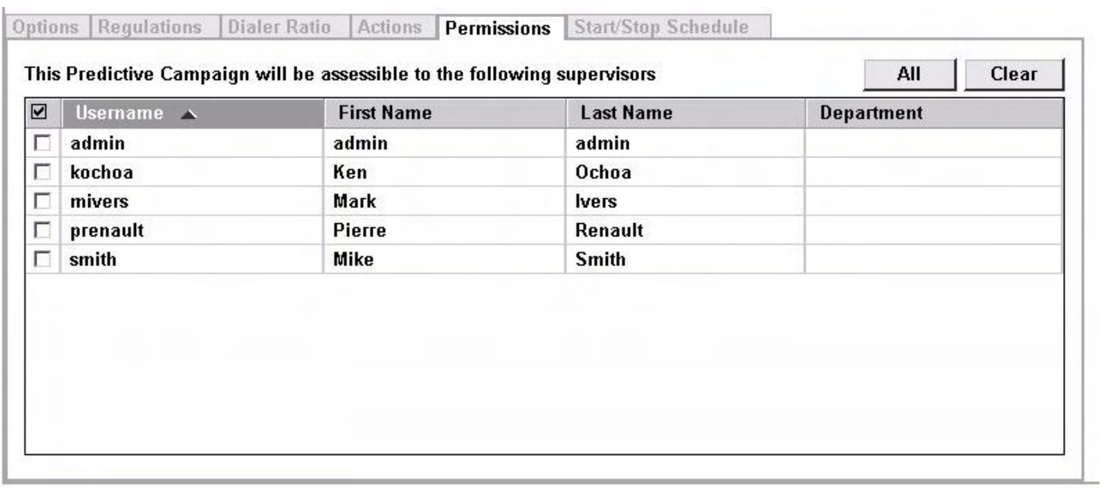


Figure 10-10 Permissions Subtab

a. Click a check box next to a supervisor’s name so that the supervisor can see this project name and dialer list when logging into SM. In addition, the supervisor can start and stop dialing for the list.

b. Do not select a supervisor’s check box so that the supervisor cannot see this project when logging into SM. In addition, the supervisor cannot start the predictive dialing for the project.

Starting and Stopping a Predictive Project

Conditions for Predictive Dialing:

Before predictive dialing can start, you must meet several conditions. When starting a Predictive Project in AM, you are really telling the server:

- Look at all the conditions required for predictive dialing to start.
- If all of the conditions are true, start dialing.

Agent Conditions

- At least 1 agent must be available to receive predictive calls.
- The available agent(s) must be logged into IM and logged into a predictive project.

Agent conditions can vary, depending on what actions are set for predictive dialing. See page 10-23 for more information.

Supervisor Conditions

- A supervisor must start at least one dialer list in the SM program.

Administrator Conditions

- The available agents must be associated with the workgroup the Predictive Project uses (**Options** > **Project** > **Predictive** > **Select a Workgroup** drop-down menu)
- Supervisors must have permissions to use a dialer list (**Options** > **Projects** > **Predictive** > **Permissions**)

- The company must have the predictive feature enabled (**Options** > **Company** > **Company Configuration** > **Enable Predictive** check box)
- The predictive project must be started in AM (either manually or using a Start/Stop Schedule).
- There must be some numbers in at least one dialer list that are available to be called. (For example, some numbers which have not already been called or marked as Do Not Call.)
- At least one dialer list must have been uploaded to the project.

Company Conditions

- The company must have a predictive license. If you set up a project without a license, the dialer will not function unless the company has purchased a predictive license from Telephony@Work.

To manually start a predictive project

When manually starting a predictive project, CCA tries to dial all numbers in the project's dialer lists. To dial only selected numbers or to make calls at specific times, you must create a Start/Stop Schedule. (See "To create a Predictive Dialing Schedule" on page 10-27.)

1. Click **Options > Projects > Predictive > Start/Stop Schedule** subtab (Figure 10-11).

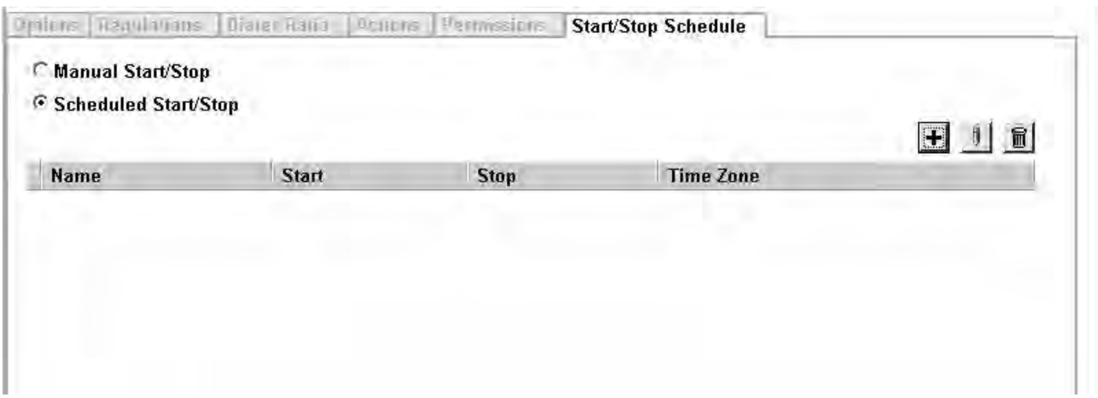


Figure 10-11 Start/Stop Schedule Subtab

3. Click the **Manual Start/Stop** button.

4. Click the **Start** button.

To manually stop a predictive project

1. Select **Options > Projects > Predictive > Start/Stop Schedule** subtab.

2. Click the **Manual Start/Stop** button.

3. Click the **Stop** button.

To create a Predictive Dialing Schedule

1. Select **Options > Projects > Predictive > Start/Stop Schedule** subtab.

2. Click the **Scheduled Start/Stop** button.

3. Click the plus (**+**) icon. The **Weekly Predictive Scheduling** dialog box (Figure 10-12) appears.

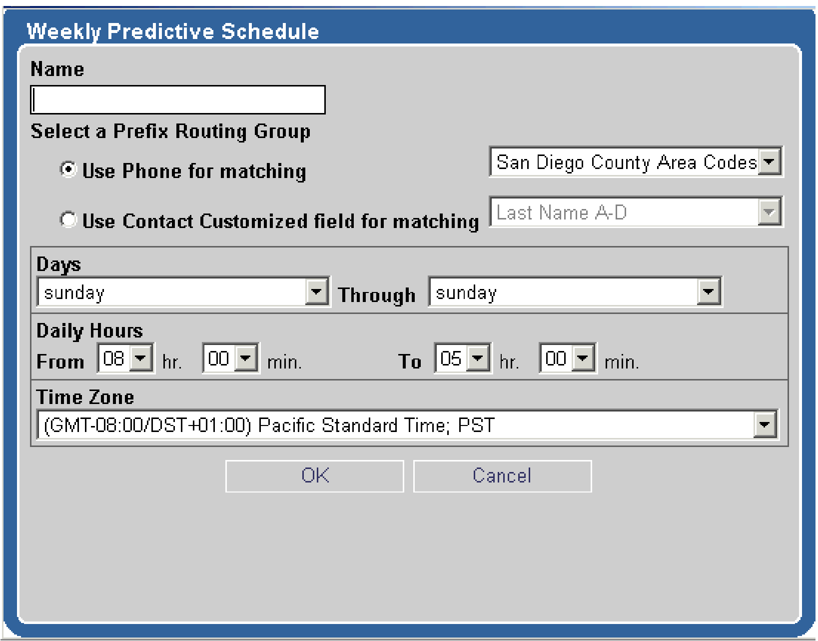


Figure 10-12 Weekly Predictive Schedule Dialog Box

4. Type a name for the schedule.

5. Under Select a Prefix Routing Group, select to dial only those numbers that match a specific pattern:

    a. Choose **Use Phone for Matching** to call people whose phone number matches a specific pattern.

    b. Choose **Use Contact Customized field for matching** to call people that match another pattern (such as income, State, Zip Code, and so on).

For examples showing how to dial all numbers or just selected numbers in a dialer list, see page 10-29.

---

6. From the Days drop-down menu, select the days the predictive dialing schedule runs (such as **Monday through Friday**).

7. From the Daily Hours drop-down menu, select when the predictive dialing schedule runs (such as **8:00 to 5:00**).

8. From the Time Zone drop-down menu, select where the project runs.

9. Click **OK** to save the schedule.

10. In the **Predictive** tab, click **OK** (or **Apply**).

Examples of Predictive Dialing Schedules

These examples take you step-by-step through the entire process of setting up predictive dialing schedules. Going through these examples helps you understand how predictive schedules work and why they are so useful.

Create sample dialer list in a spreadsheet program and save it in CSV (Comma Separated Variable) format. A sample dialer list can be as simple as:

	A	B	C	D
1	First Name	Last Name	Phone	
2	Steve	Smith	16195225110	
3	Mike	Jones	17605430990	
4				
5				

Figure 10-13 Simple Dialer List CSV

Example 1: Dial all numbers in the dialer list(s)

This example shows how to do pattern matching against phone numbers.

1. Create a Prefix Routing Pattern:

   a. Click **Libraries** > **Prefix Routing Patterns** > **Add** button. The Add Prefix Routing screen (Figure 10-14) appears.

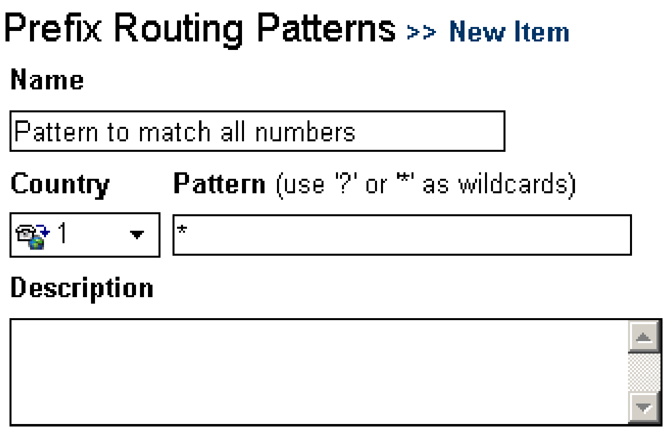


Figure 10-14 Prefix Routing Pattern

   a. Under Name, type **Pattern to match all numbers**.

   b. Under Pattern, type an asterisk (*****).

   c. Click **OK**.

2. Create a Prefix Routing Group:

a. Click **Libraries** > **Prefix Routing Groups** > **Add** button.

The Add Prefix Routing Groups screen (Figure 10-15) appears.

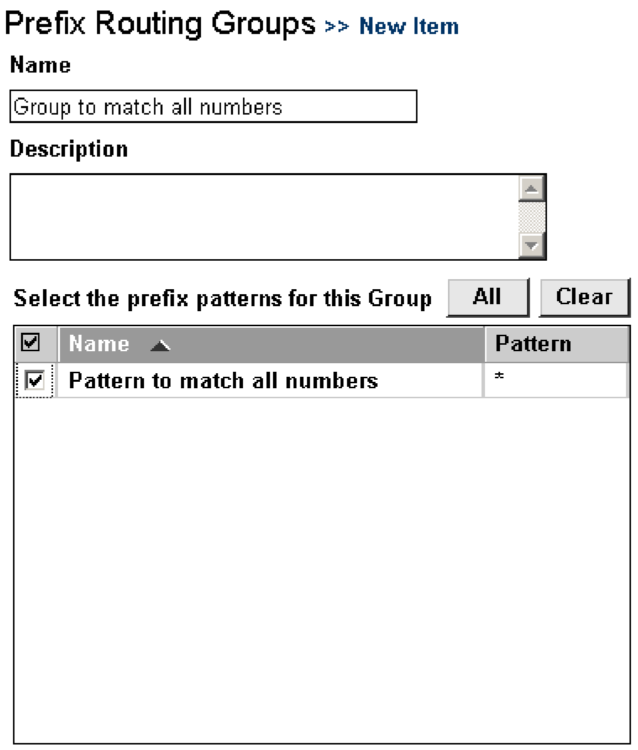


Figure 10-15 Prefix Routing Group

b. Under Name, type **Group to match all numbers**.

c. Click the **All** button (next to Select the prefix patterns for this Group).

d. Click **OK**.

3. Create a Start/Stop Schedule:

a. Click **Options > Projects > Add** button. The Add Project screen appears.

b. Click the **Predictive** tab > check **Enable Predictive Project**.

c. Click the **Start/Stop Schedule** subtab, the **Scheduled Start/Stop** button, and then the plus (**+**) icon.

The Weekly Scheduled Start/Stop dialog box (Figure 10-16) appears.

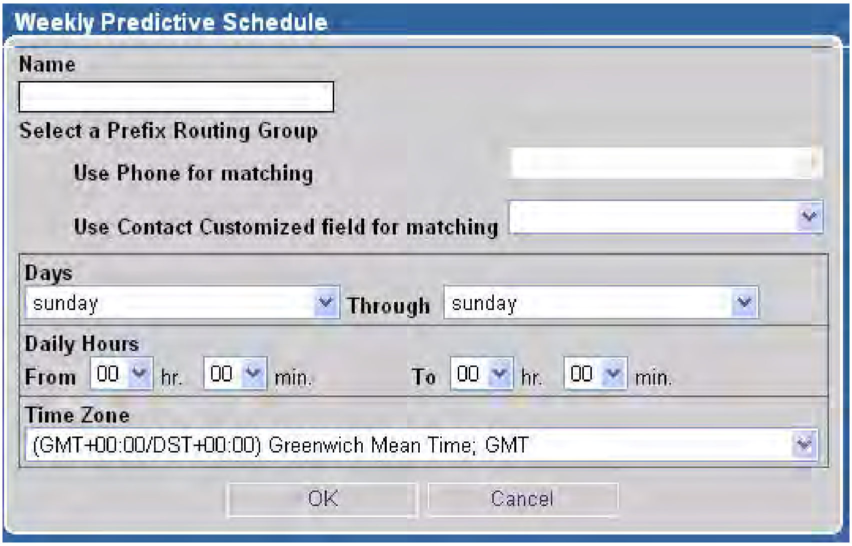


Figure 10-16 Weekly Schedule Start/Stop Dialog Box

a. Under Name, type **Dial All Numbers**.

b. Under Select a Prefix Routing Group, select **Use Phone for Matching** and choose **Group to match all numbers**.

c. From the drop-down menus, select the Days, Daily Hours, and Time Zone for the schedule.

d. Click **OK** to save.

e. In the Predictive tab, click **OK** (or **Apply**).

4. Upload a dialer list. (For this example, use a simple dialer list with the following columns: First Name, Last Name, and Phone.)

a. Click **Options** > **Projects** > **Edit** button. The Edit Projects screen appears.

b. Click the **Dialer Lists** tab (Figure 10-17).

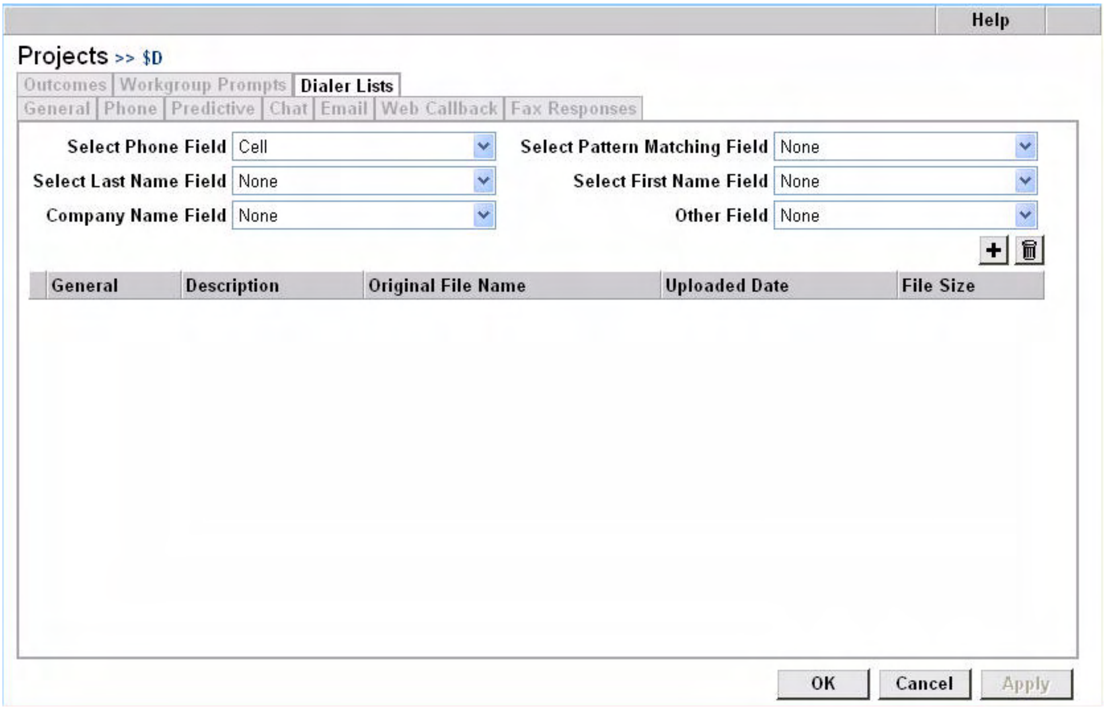


Figure 10-17 Dialer Lists Tab

c. From the Select Phone Field, drop-down menu, choose **Work**.

d. From the Select Last Name Field drop-down menu, choose **Last Name**.

e. From the Select First Name Field drop-down menu, choose **First Name**.

f. Click the plus (**+**) icon.

The Add Dialer List dialog box (Figure 10-18) opens.

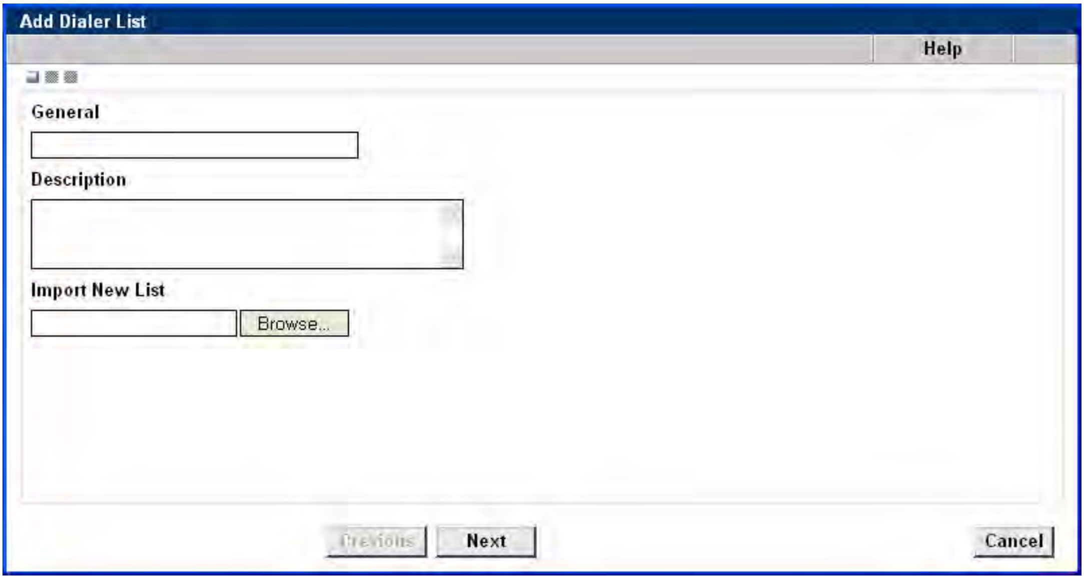


Figure 10-18 Add Dialer List Dialog Box

g. In the General box, type a name for the list.

h. In the Description box, type a description for the list.

i. Click **Browse** to locate and load the dialer list file.

j. Click **Next**.

The Dialer List dialog box refreshes to show the Mapping Dialer List Columns to the Contact Template dialog box (Figure 10-19).

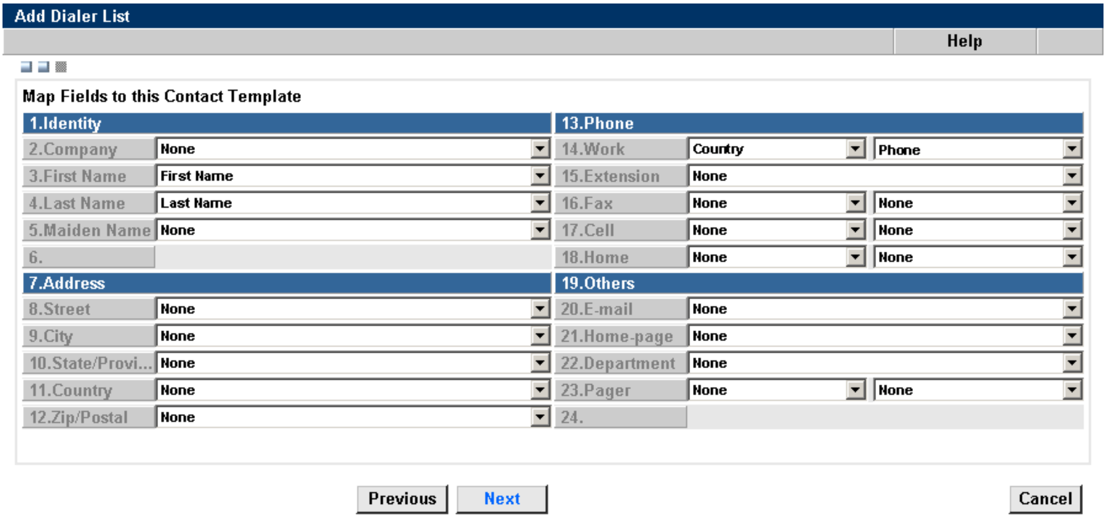


Figure 10-19 Mapping Dialer List Columns to the Contact Template

k. Associate the columns in the dialer list to fields in the Contact Template. This is an important step because it is the only way AM has to understanding what the dialer list data looks like.

   This example dialer list only has three fields, so those are the only ones to map.

Map the “Phone” column in the dialer list to the “Work Phone” field in the Contact Template.

---

l. Click **Next**, then click **Upload**.

m. After the dialer list finishes uploading (Figure 10-20), click **Close Window**.

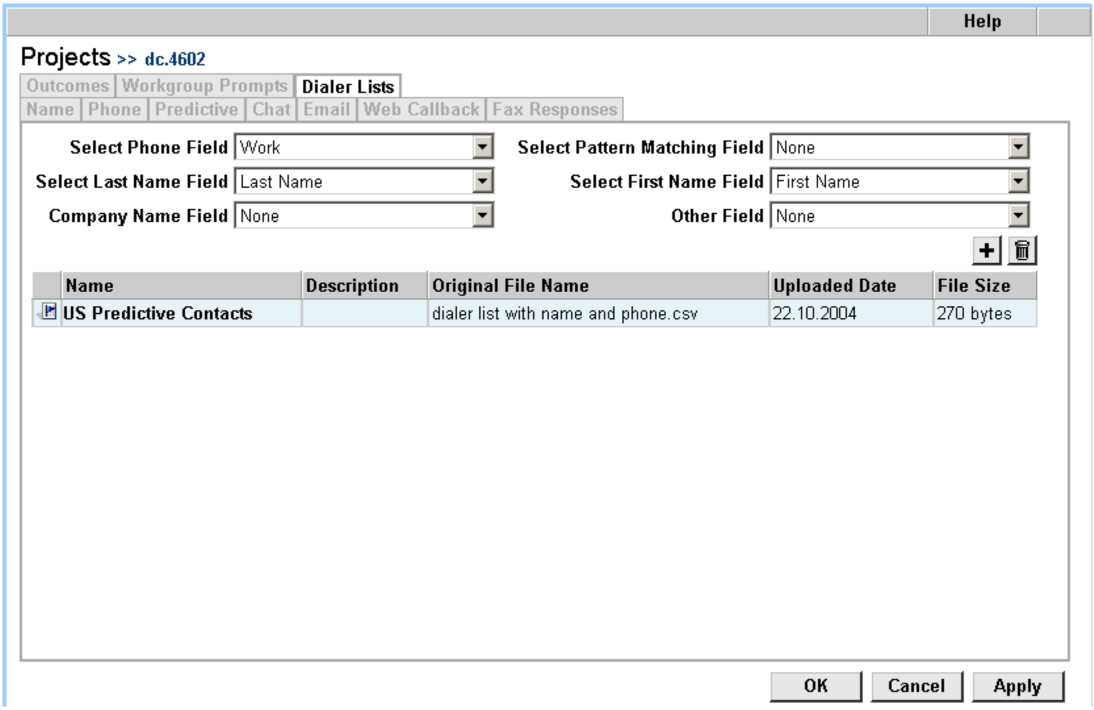


Figure 10-20 Dialer List Tab After Uploading Dialer List

The Start/Stop Schedule is complete.

Example 2: Dial only selected area codes

This example shows how to create a Start/Stop Schedule that only calls customers if they are in San Diego County (pattern matching against a phone field). This project uses the System Contact Template from **Options** > **Project** > **Name** > the **Select Contact Template for this Project** drop-down menu.

1. Create a Prefix Routing Pattern:

   a. Click **Libraries** > **Prefix Routing Patterns** > **Add** button.

      The Add Prefix Routing Patterns screen (Figure 10-21) appears.

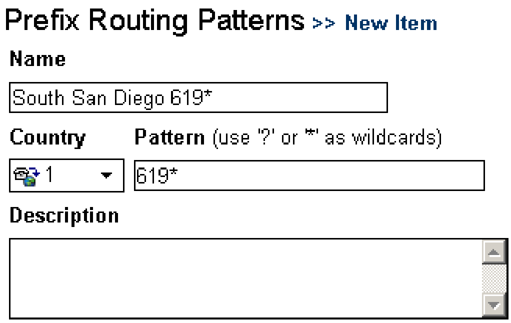


Figure 10-21 Prefix Routing Pattern

b. Under Name, type **South San Diego 619***.

c. Under Pattern, type **619***.

d. Click **OK**.

e. Create two more patterns:

i. Name: **Central San Diego 858*** and Pattern: **858***

ii. Name: **North San Diego 760*** and Pattern: **760***

Figure 10-22 shows the three prefix patterns for San Diego.

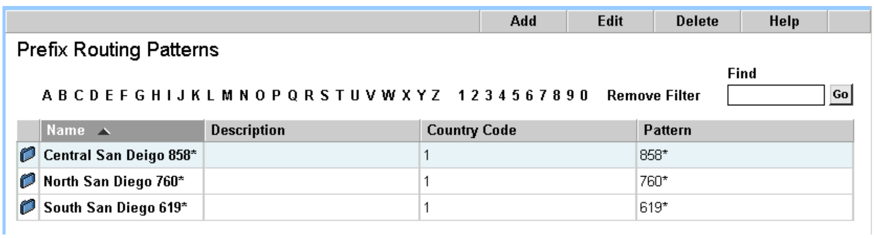


Figure 10-22 THree Prefix Patterns Covering All of San Diego

2. Create a **Prefix Routing Group**.

a. Click **Libraries** > **Prefix Routing Groups** > **Add** button.

The Add Prefix Routing Groups screen (Figure 10-23) appears.

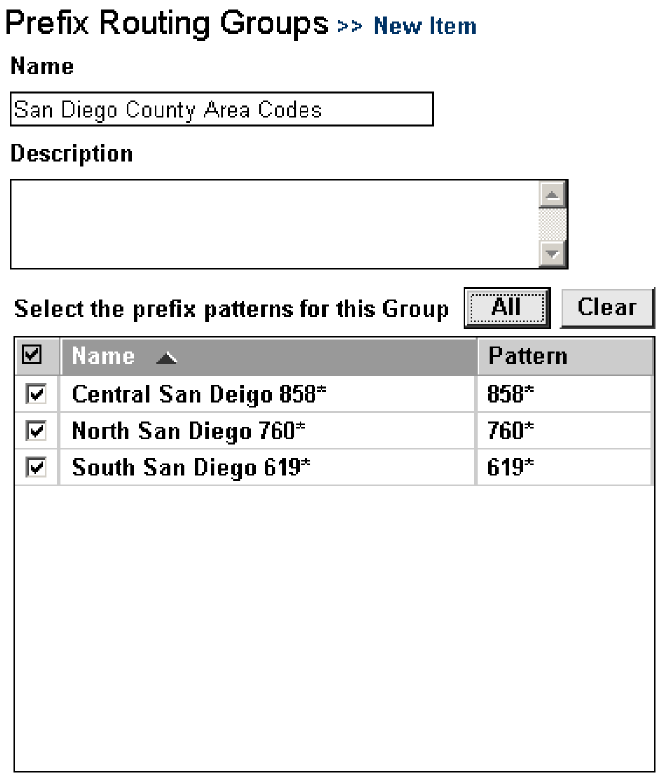


Figure 10-23 Prefix Routing Group

b. Under Name, type **San Diego County Area Codes**.

c. Click the **All** button.

d. Click **OK**.

3. Create a Start/Stop Schedule:

a. Click **Options > Projects > Add** button. The Add Projects screen appears.

b. Click the **Predictive** tab and then click **Enable Predictive Project**.

c. Click the **Start/Stop Schedule** subtab.

d. Click the **Scheduled Start/Stop** radio button. Additional fields appear.

e. Click the plus (**+**) icon. The Weekly Predictive Schedule dialog box appears.

f. Under Name, type **Dial San Diego County Numbers**.

g. Under Select a Prefix Routing Group, select **Use Phone for Matching** and choose **San Diego County Area Codes**.

h. From the drop-down menus, select the Days, Daily Hours, and Time Zone for the schedule.

i. Click **OK** to save the schedule.

j. In the **Predictive** tab, click **OK** (or **Apply**).

4. Upload a dialer list. For this example, use a simple dialer list with the following columns: First Name, Last Name, Country Code and Phone.

a. Click **Options** > **Projects** > **Edit** button. The Edit Projects screen appears.

b. Click the **Dialer Lists** tab. The Dialer Lists screen appears.

c. From the Select Phone Field drop-down menu, choose **Work**.

d. From the Select Last Name Field drop-down menu, choose **Last Name**.

e. From the Select First Name Field drop-down menu, choose **First Name**.

f. Click the plus (**+**) icon. The Weekly Predictive Schedule dialog box appears.

g. Type a name for the dialer list.

h. Click **Browse** to locate to locate and load the dialer list file.

i. Then, click **Next**.

The Dialer List dialog box refreshes to show the Mapping Dialer List Columns to the Contact Template dialog box (Figure 10-24).

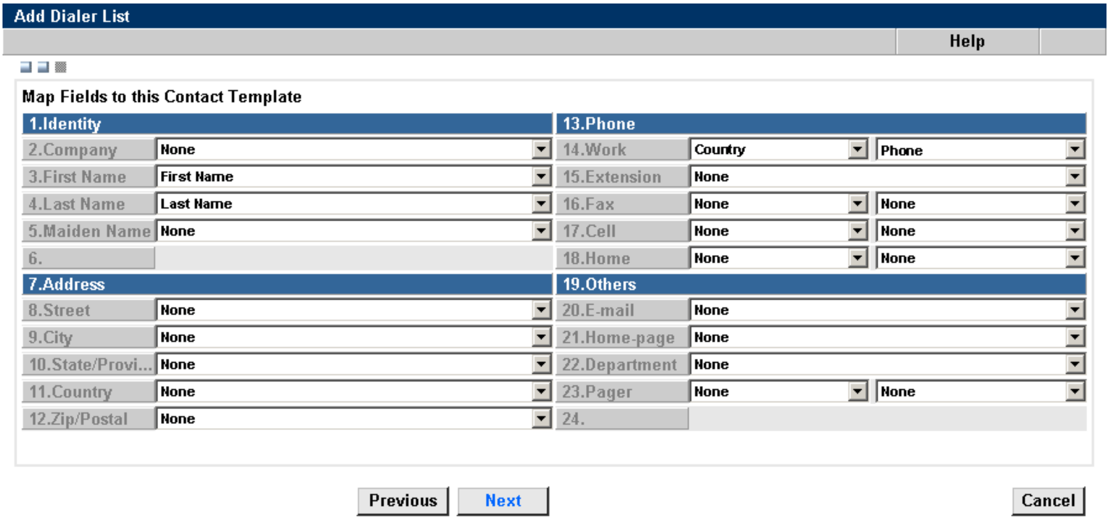


Figure 10-24 Mapping the Dialer List Columns to Contact Template

j. Associate the columns in the dialer list to fields in the Contact Template. This is an important step because its the only way AM has of understanding what the dialer list data looks like.

   This example dialer list only has four fields, so those are the only ones to map.

Map the "Phone" column in the dialer list to the "Work Phone" field in the Contact Template.

---

k. Click **Next**, then click **Upload**.

l. After the dialer list finishes uploading (Figure 10-25), click **Close Window**.

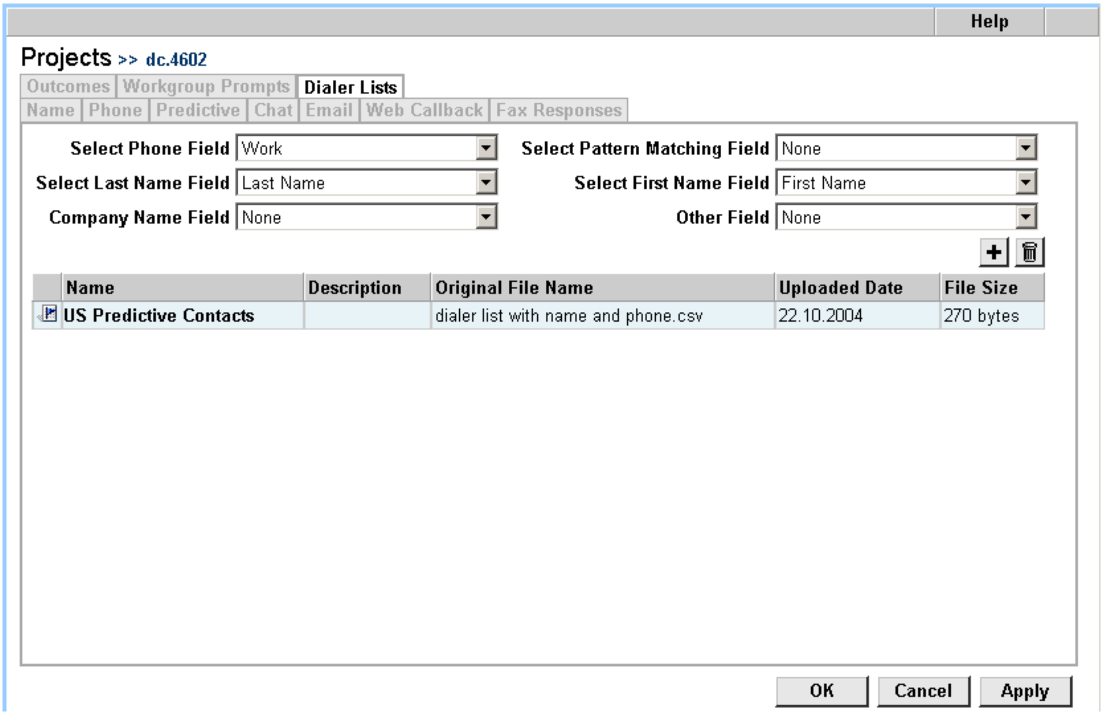


Figure 10-25 Dialer List Tab After Uploading Dialer List

The Start/Stop Schedule is complete.

Example 3: Dial only selected time zones

This example shows how to create a Start/Stop Schedule that only calls customers if they are in a specific time zone. For this example, use a simple dialer list that looks like Figure 10-26.

	A	B	C	D	E
1	First Name	Last Name	Phone	Time Zone	
2	Steve	Smith	16195225110	Eastern	
3	Mike	Jones	17605430990	Central	
4	Carla	Carluchi	16194578282	Mountain	
5	Woody	Ellis	18582124067	Pacific	
6					

Figure 10-26 Example 3: Dial Only Selected Time Zones

Dialing selected time zones (pattern matching against a non-phone field) has one more step than dialing selected phone numbers (pattern matching against a phone field). You must add a “pattern matching” field to the Contact Template the project uses.

When uploading a dialer list, map the columns in the dialer list to the Contact Template that the project uses:

1. Click **Options** > **Projects** > the **Add** button. The Add Project screen appears.

2. In the **General** tab and from the **Select Display Template for this Project** drop-down menu, select **Contact Template**.

3. Mapping the columns in the dialer list to the fields in the Contact Template helps CCA understand the data in the dialer list. For example, CCA needs some way to understand that a column in the dialer list contains phone numbers and that is the column to use for dialing.

   To do pattern matching against a non-phone column in the dialer list (for example, dial selected time zones, rather than selected phone numbers):

   i. Add a new field to the Contact Template. Assign the field an action type of **Pattern Matching**.

   ii. Upload the dialer list and map the string column (time zone) in the dialer list to the **Pattern Matching** field on the Contact Template.

   This tells CCA: “I want to call customers only if they match a specific pattern in one of the columns of my dialer list.”

To set up a Matching Pattern

1. Create a Matching Pattern:

   a. Click **Libraries** > **Matching Patterns** > **Add** button.

      The Add Matching Patters screen (Figure 10-27) appears.

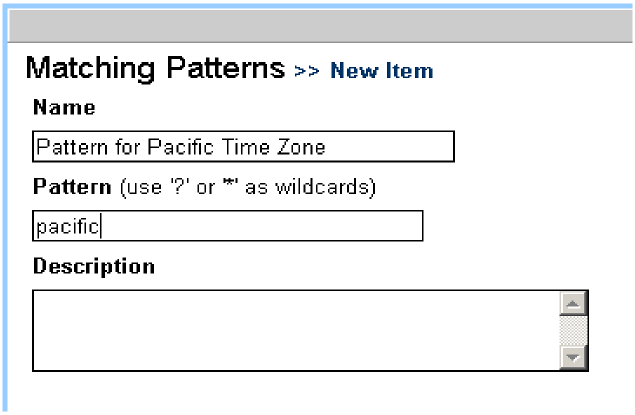


Figure 10-27 Matching Patterns Screen

b. Under Name, type **Pattern for pacific time zone**.

c. Under Pattern, type **pacific**.

d. Click **OK**.

2. Create a Pattern Matching Group:

a. Click **Libraries** > **Pattern Matching Groups** > **Add** button.

The Add Pattern Matching Groups screen (Figure 10-28) appears.

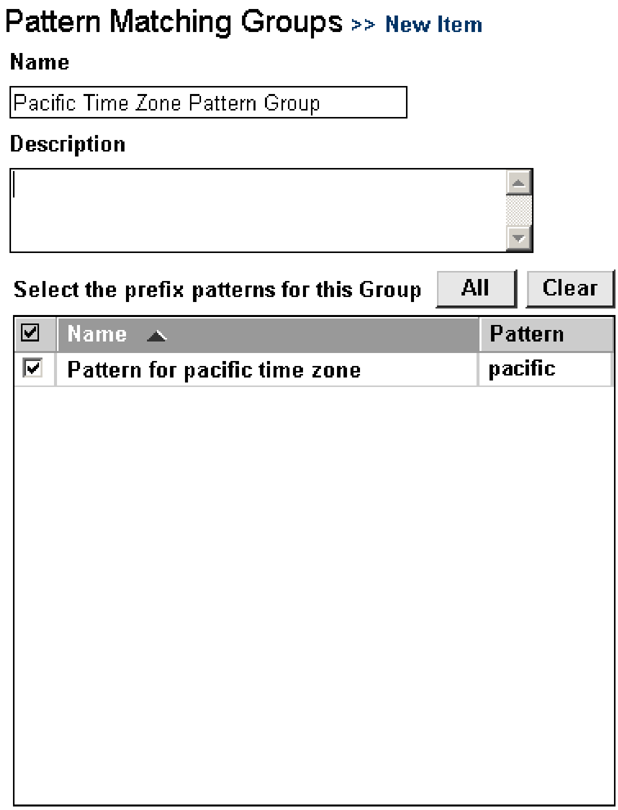


Figure 10-28 Pattern Matching Group

b. Under Name, type **Pacific Time Zone Pattern Group**.

c. Click the **All** button.

d. Click **OK**.

3. Create a Start/Stop Schedule:

   a. Click **Options > Projects > Add** button. The Add Projects screen appears.

   b. Click the **Predictive** tab and then click **Enable Predictive Project**.

   c. Click the **Start/Stop Schedule** subtab.

d. Click the **Scheduled Start/Stop** button.

e. Click the plus (**+**) icon. The Weekly Predictive Schedule dialog box appears.

f. Under Name, type **Call Customers in Pacific Time Zone**.

g. Under Select a Prefix Routing Group, select **Use Contact Customized field for Matching** and choose **Pacific Time Zone Pattern Group**.

h. From the drop-down menus, select the Days, Daily Hours, and Time Zone for the schedule.

i. Click **OK** to save the schedule.

j. In the **Predictive** tab, click **OK** (or **Apply**).

4. Modify the System Contact Template:

   To keep things simple, the Project uses the System Contact Template. In a real call center, create a custom Contact Template for the Project:

   a. Click **Libraries** > **Display Templates**. A list of display templates appears.

   b. Double-click **System Contact**. The Edit Display Templates screen opens.

   c. Click the **Layout** tab (Figure 10-29).

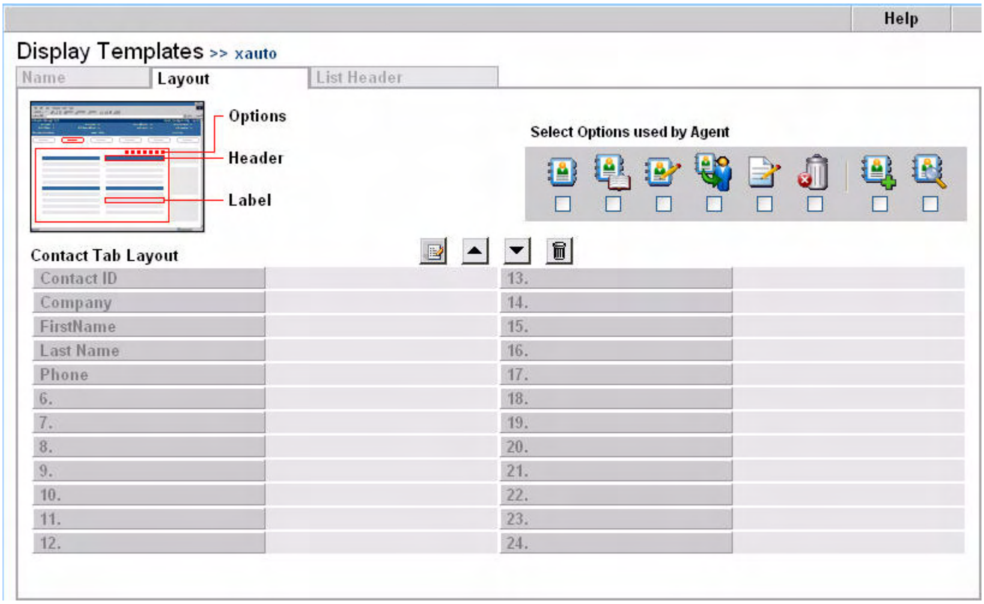


Figure 10-29 Layout Tab

d. Double-click an unused field. The **Defined Label** dialog box (Figure 10-30) appears.

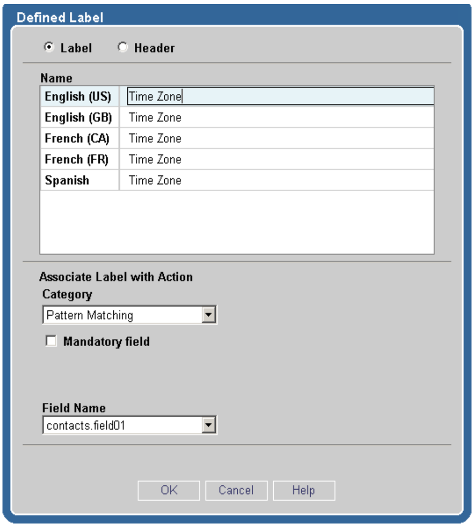


Figure 10-30 Defined Label Dialog Box

i. In the right column, type **Time Zone** as the field name.

ii. From the Associate Label with Action drop-down menu, choose **Pattern Matching**.

iii. From the Field Name drop-down menu, choose one of the **contacts.field*0X*** fields not previously used. (These are "extra" fields CCA includes in the Contacts table for customer use.)

iv. Click **OK** to close the dialog box.

v. Click **OK** again to save your changes to the template.

5. Upload a dialer list. For this example, use a simple dialer list with the following columns: First Name, Last Name, Phone, Country Code, and Time Zone.

   a. Click **Options** > **Projects** > **Add** button. The Add Project screen appears.

   b. Click the **Dialer Lists** tab.

      i. From the Select Phone Field drop-down menu, choose **Work**.

      ii. From the Select Last Name Field drop-down menu, choose **Last Name**.

      iii. From the Select First Name Field drop-down menu, choose **First Name**.

      iv. From the Select Pattern Matching Field drop-down menu, choose **Time Zone**.

   c. Click the plus (**+**) icon.

      i. Type a name for the dialer list.

      ii. Click **Browse** to locate your dialer list and then click **Next**. The Mapping screen (Figure 10-31) appears.

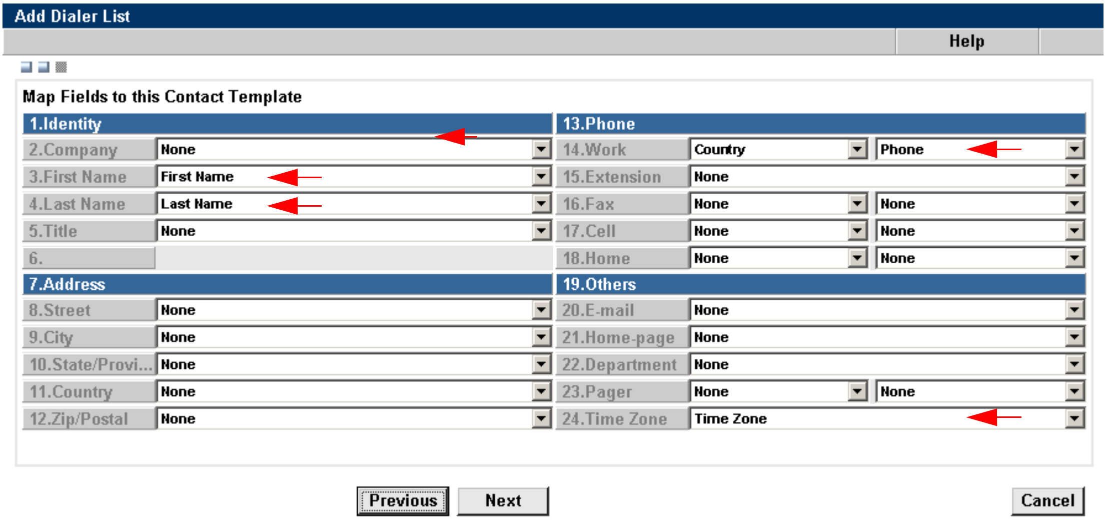


Figure 10-31 Mapping the Dialer List Columns to the Contact Template

iii. Use the Map Fields to This Contact Template screen to associate the columns in the dialer list to fields in the Contact Template. This is an important step because its the only way AM has of understanding what the dialer list data looks like.

This example dialer list only has five fields, so those are the only ones to map.

Map the “Time Zone” column in the dialer list to the “Time Zone” field in the Contact Template.

---

iv. Click **Next** and then click **Upload**.

v. After the dialer list finishes uploading, click **Close Window**. Figure 10-32 shows the Dialer List tab after uploading the dialer list.

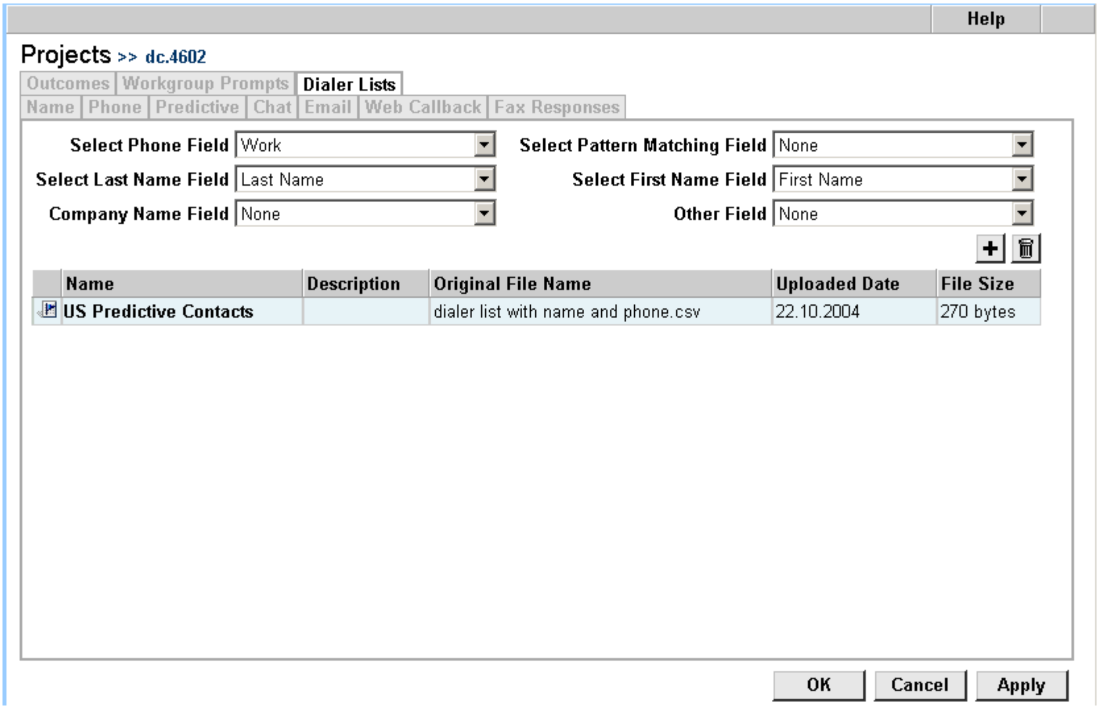


Figure 10-32 Dialer List Tab After Uploading Dialer List

The Start/Stop Schedule is complete.

Predictive Summary and Detailed

Table 10-9 shows the possible results from a predictive call attempt and the actions CCA takes on predictive calls.

It is possible to create a report that breaks down the number of each predictive call result. (For how to create the Predictive Summary Report, see “The Predictive Reports” on page 18-1.).

Table 10-9. Predictive Call Results and Descriptions

Result	Description
Answer	A person answered the predictive call.
Answering Machine	An answering machine answered the predictive call.

Table 10-9. Predictive Call Results and Descriptions

Result	Description
Busy	The predictive call resulted in a busy signal.
Error	An error (no dial tone, no line available, and so on) prevented CCA from placing the predictive call.
Fax	A fax machine answered the predictive call.
Invalid	The number used for the Predictive call was out of service or not a valid number.
No Answer	There was no answer at the number dialed.

Table 10-10 shows the possible actions CCA takes after a predictive call result.

It is possible to create a report that displays the action taken for all predictive calls attempted by the project. (For how to create the Predictive Detailed Report, see “The Predictive Reports” on page 18-1.)

Table 10-10. CCA Action and Description

Action	Description
Call Back	CCA will call this number back at the specified time.
Call not connected	An answering machine answered the predictive call.
Connected	The predictive call was connected with an agent.
Failed to send fax	An attempt to send a fax was unsuccessful.
Fax file not found	The .TIF file to be faxed could not be found at the specified location.
Fax sent	CCA sent the specified fax to the fax machine that answered the predictive call.
Left message and will call back	CCA left the specified message on the answering machine that answered the predictive call and CCA will call this number back at the specified time.
License not available	No license is available to permit connection of the predictive interaction to an agent. (Contact the vendor to purchase a license for additional interactions.)
Message on the answering machine	CCA left the specified message on the answering machine that answered the predictive call.
Remove from list	The number was removed from the predictive database and CCA will not call it again.

Running the Clean List Tool for a Do Not Call List

CCA supplies a standalone Clean List Tool for adding and cleaning the FTC Do Not Call (DNC) List to your CCA database.

- You can only use the Clean List Tool with a DNC list in .csv format. CCA does not support the XML format.
- You must have already created at least one predictive project.
- The Clean List Tool assumes that your DNC list **does not** contain duplicate phone numbers. (The utility fails if it finds duplicate numbers in the DNC list. The utility does not report an error message if it fails on duplicate phone numbers.)
- This tool may take minutes or even hours to run, depending on:
  - Whether you are uploading the DNC list for the first time or running an update. (In 2004, the DNC list had over 60 million records.)
  - The number of contacts in the Predictive Contacts table.
  - The computer hardware and network speed.

To start the DNC List Clean List Tool

1. Use AM to stop the predictive projects.
2. Start a browser and enter this URL:

   http://<hostname><:port>/taw/DoNotCall/

   The Login screen (Figure 10-33) opens.

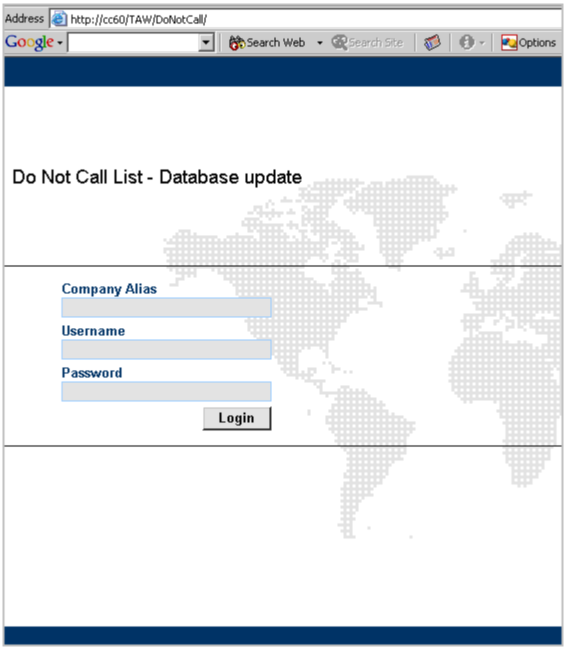


Figure 10-33 Login Screen

3. Enter login information:

   a. If you login as **Netadmin**, all predictive projects for all companies appear.

   b. If you login as **Sysadmin**, all predictive projects for only your company appears.

To upload a DNC List for the first time

Uploading a DNC list for the first time is a two step process.

- First, the utility uploads the entire DNC list to the CCA database.
- Second, the Clean List Tool removes DNC numbers from the predictive project contact lists. It also removes DNC numbers from preview projects that do not include a predictive project.

1. Start the utility and login.

2. Select **Import Initial List**.

3. In the text box, type a valid UNIX- or Windows-based file path.

   Your DNC list ***must*** be on your CCA Web server machine in a directory that the Web server can access.

To ensure that the entire list is updated in the database, you must upload the list from the Web server, not from your local machine. Therefore, before uploading, save a copy of the list on your Web server. (If the list is not updated from the Web server, the entire list may not be updated in the database.)

---

4. Click the **Submit** button (Figure 10-34).

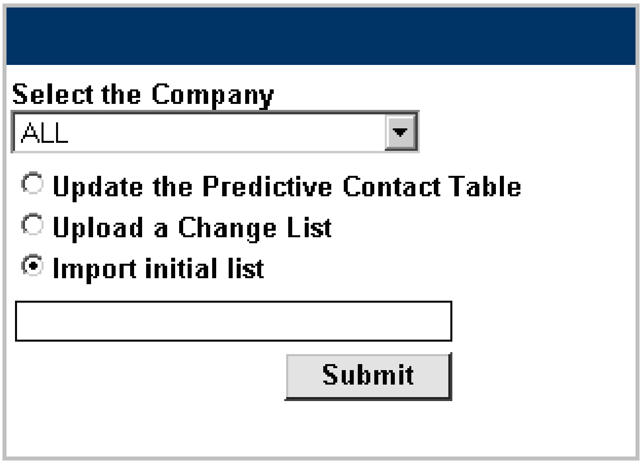


Figure 10-34 Select the Company

   Uploading a DNC list for the first time will take several hours, at least.

5. When the DNC list finishes uploading, select the **Update the Predictive Contact Table** button.

   The Predictive Contact Table screen (Figure 10-35) appears.

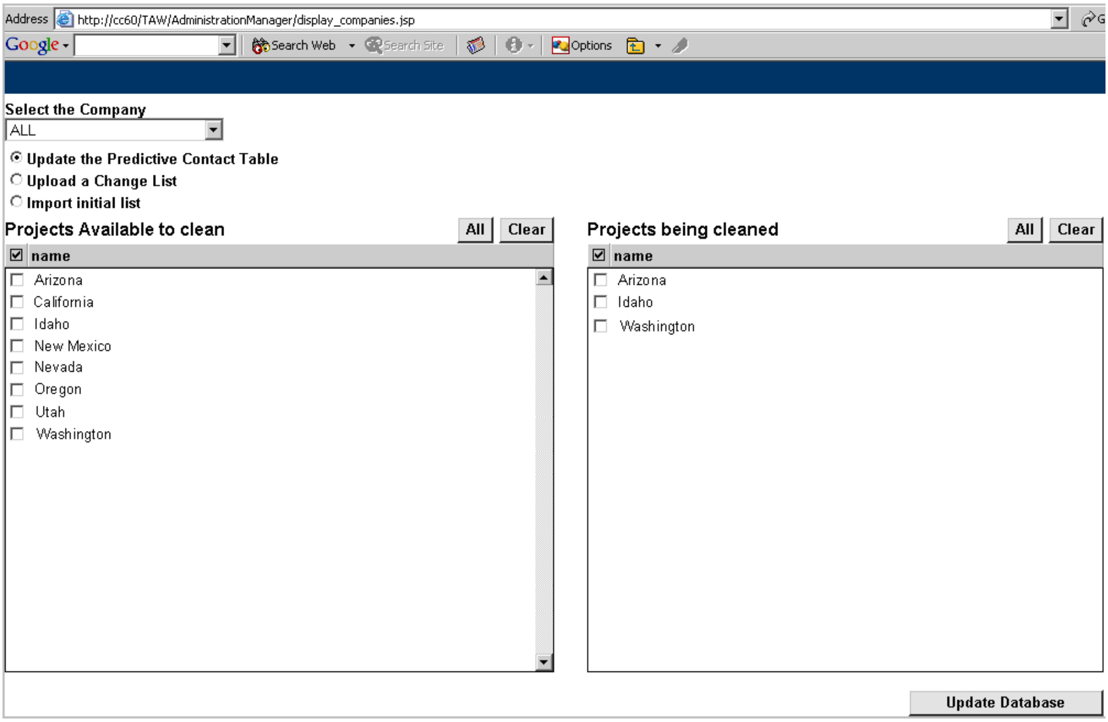


Figure 10-35 Predictive Contact Table Screen

6. In the left pane, under **Projects Available to Clean**, select one or more predictive projects and/or preview projects (preview projects that do not include a predictive project appear on the list, as well) and then click the **Update Database** button.

   The utility temporarily moves the selected projects to the right pane, to indicate that they are being worked on.

   The utility removes any phone number in a project you selected, if it finds the number in the DNC list.

   After updating all of the projects you selected, they are removed from the **Projects Being Cleaned** pane.

7. Close the browser that was running the DNC utility.

The phone numbers in your predictive projects are updated.

To upload a DNC change list

Follow these steps if you already uploaded the initial DNC list and want to upload a DNC change list.

Uploading a DNC change list is a two step process:

- First, the utility uploads the DNC change list to your CCA database.
- Then, the utility removes DNC numbers from your predictive project contact lists and from any preview projects that do not include a predictive project.

1. Start the utility and login.
2. Select **Upload a Change List**.

To ensure that the entire list is updated in the database, you must upload the list from the Web server, not from your local machine. Therefore, before uploading, you must save a copy of the list on your Web server. (If the list is not updated from the Web server, the entire list may not be updated in the database.)

---

3. In the text box, type a valid UNIX or Windows based file path.

   Your DNC change list must be on your CCA Web server machine in a directory that the Web server can access.

4. Click the **Submit** button (Figure 10-36).

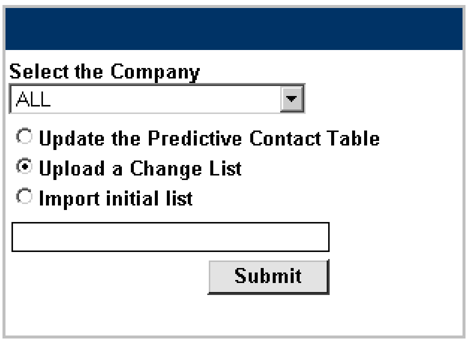


Figure 10-36 Submit

5. After the DNC list finishes uploading, select the **Update the Predictive Contact Table** button (Figure 10-37).

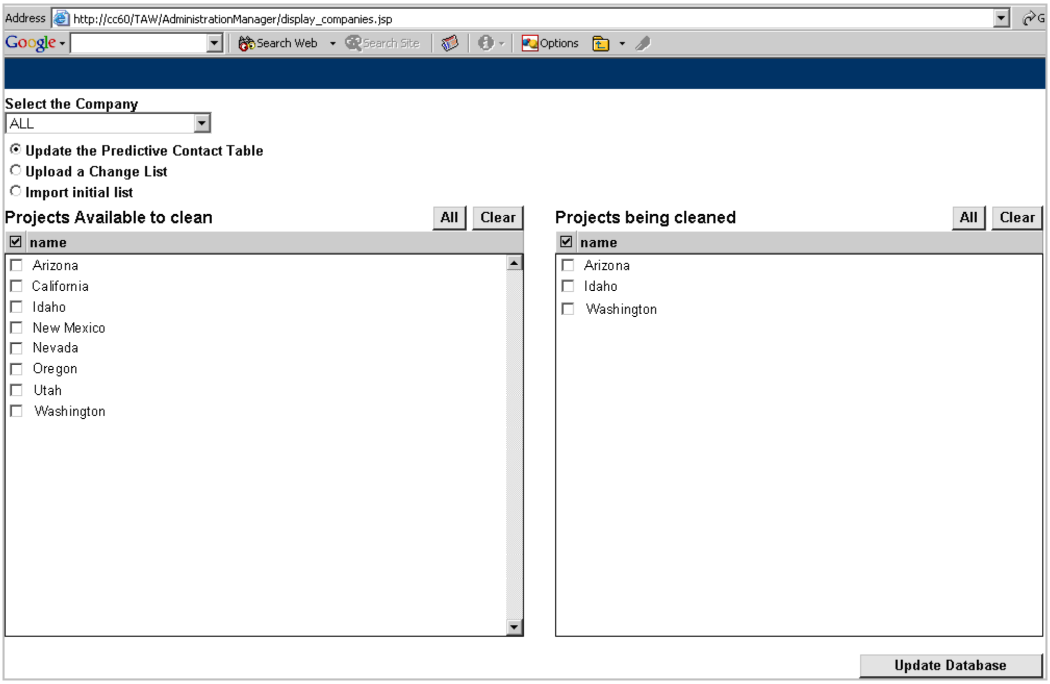


Figure 10-37 Update the Predictive Contact Table

6. In the left pane, under **Projects Available to Clean**, select one or more predictive projects or preview projects (that do not include a predictive project), then click the **Update Database** button.

   The utility temporarily moves the selected projects to the right pane, to indicate that they are being worked on.

   The utility removes any phone number in a project you selected, if it finds the number in the DNC list.

   When all of the projects you selected finish updating, they are removed from the **Projects Being Cleaned** pane.

7. Close the browser that was running the DNC utility.

The phone numbers in your predictive projects and preview projects (that do not include a predictive project) are updated.

Adding Chat Interactions to a Project

Chat Projects handle Web-based chat requests so you can control:

- How to route the chat request
- The Web pages to display to the customer while CCA handles their chat request
- The Web page content to provide to agents for sending to customers

To set up a chat project

1. Click **Options** > **Projects** > click the Project to set up and then click the **Edit** button. The Edit Project screen appears.

2. Click the **Chat** tab and then click **Enable Chat Project**. The screen opens to the Push pages subtab (Figure 10-38).

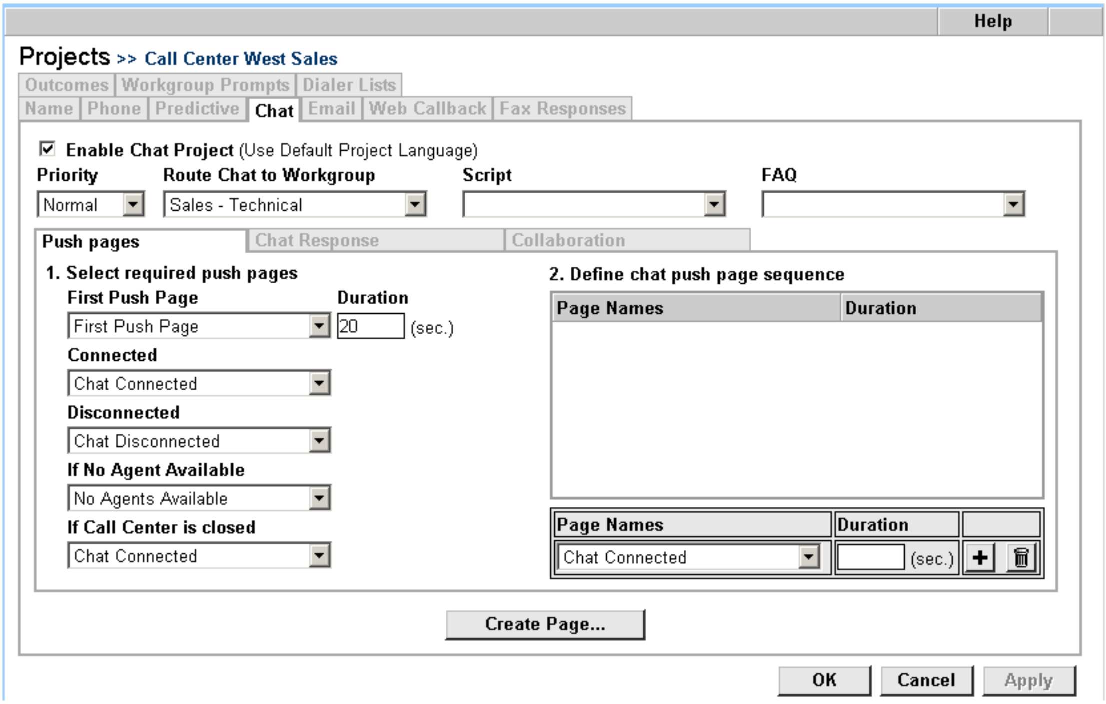


Figure 10-38 Chat Tab - Push Pages Subtab

3. Using the information in Table 10-11, complete the fields.

Table 10-11. Chat Tab - Push Pages Subtab Fields and Descriptions

Field	Description
Priority	From the drop-down menu, select the priority level to assign to interactions reaching this chat project. **Note**: CCA routes interactions to workgroups through a project with High priority to an agent before interactions reaching the same workgroup through a project with a Low priority.
Route Chat to Workgroup	From the drop-down menu, select the workgroup containing the agents who will handle chat requests coming into this project.
Script FAQ	From the drop-down menus, select the script and FAQ URLs to display on the agent's screen upon receiving the chat interaction.
First Push Page	From the drop-down menu, select the Web page to display to the customer after they submit their chat request and while CCA attempts to connect the customer with an agent. (Typically, this content thanks the customer for their inquiry and indicates that they are in the process of being connected to an agent.) In the **Duration** text box, enter the length of time (in seconds) to display the first push page before cycling the custom push page sequence.
Connected	From the drop-down menu, select the Web page to display to the customer after successfully connecting to an agent.
Disconnected	From the drop-down menu, select the Web page to display to the customer when the agent disconnects from the customer.
If No Agent Available	From the drop-down menu, select the Web page to display to the customer if no agents are available to handle the chat request.
If Call Center is Closed	From the drop-down menu, select the Web page to display to the customer if the call center is closed.

4. Under Define Chat Push Page Sequence:

a. From the Page Names drop-down menu, select a page to specify a sequence of custom push pages in addition to the required push pages.

   Additional pages appear in a repeating sequence while the customer waits to be connected to an agent (meaning after the **First Push Page** but before the **Connected** page appears). For information on creating push pages for a chat project, see “Creating a URL Library” on page 4-4.

b. In the Duration field, type how long to display the page (in seconds).

c. Click  to add the selected push page to the sequence.

d. Repeat steps 6 and 7 for all the push pages to show the customer waiting for a connection to an agent.

e. To remove a push page from the sequence, click the page to delete and click .

5. Click the **Chat Response** subtab (Figure 10-39).

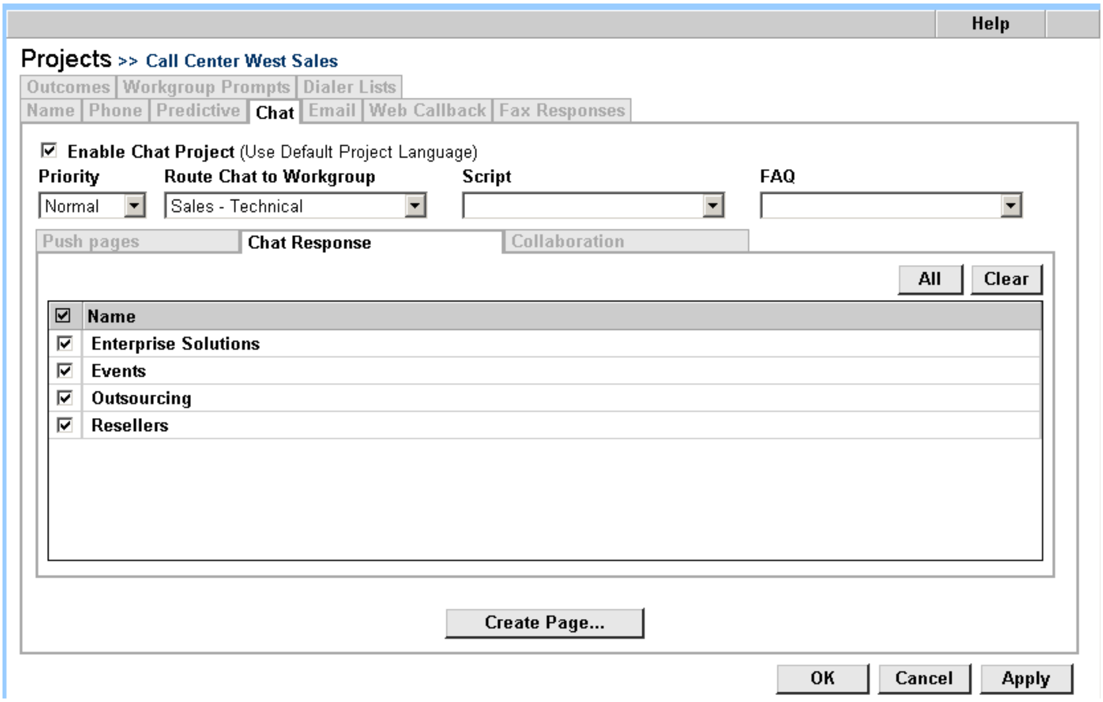


Figure 10-39 Chat Tab - Chat Response Subtab

a. Click the check box next to the Intelligent Chat Template to assign it to this project. (See "Creating an Intelligent Chat Template Library" on page 4-73.)

b. To assign all templates to the project, click the **All** button.

c. To remove all templates from the project, click the **Clear** button.

6. Click the **Collaboration** subtab (Figure 10-40).

   If an agent has an active chat interaction, collaboration allows the agent to view and change the same Web page appearing to the customer.

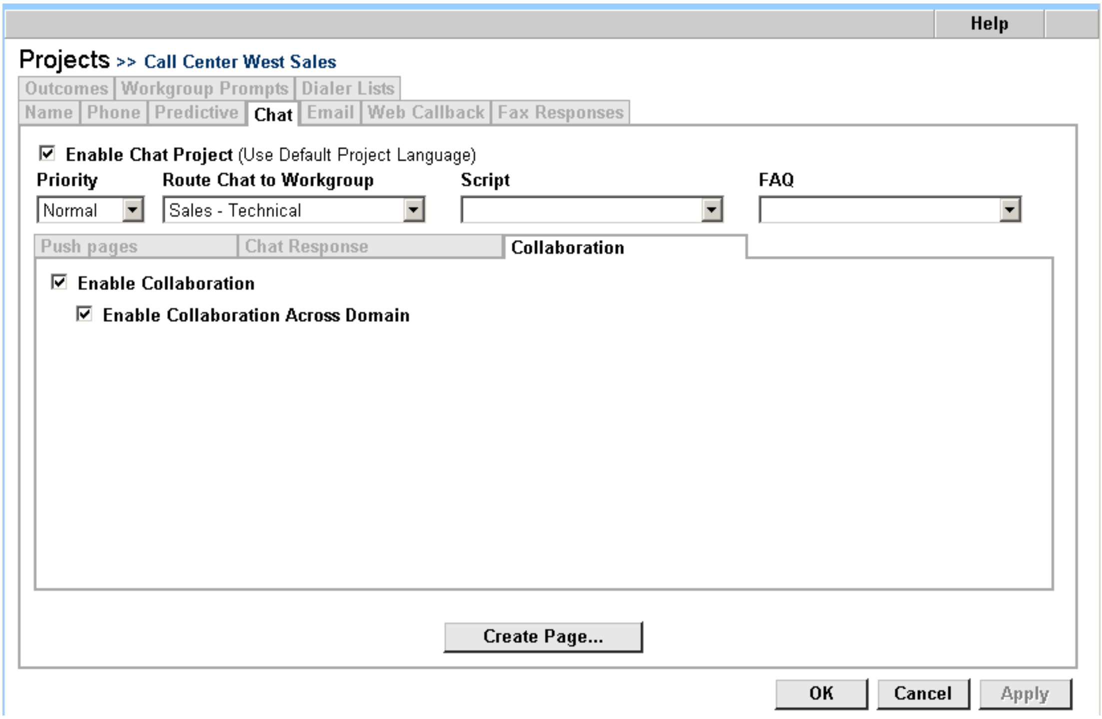


Figure 10-40 Chat Tab - Collaboration Subtab

a. Click the Enable Collaboration check box to enable the **Collaboration** button in the IM Chat tab.

   This way, if the agent has an active chat interaction and clicks the Collaboration button, a non-modal browser spawns on the agent's machine and loads the same Web page appearing to the customer.

   i. Collaboration only works with Web pages opened using the Web Chat page. For example, if the customer opens a new browser window by themselves, there is no way for the agent to see it.

   ii. Both the agent and the customer view the same Web page and can see changes that the other makes. If the agent enters text in a form field, the customer sees the text. The same is true if the customer enters text in a form field. Both the agent and customer can click on Web links and both will see the new page when it loads.

iii. If the agent closes their browser window, the customer's browser window does **not** close.

iv. If the agent moves their mouse, the customer does **not** see their own mouse cursor move.

b. Click the **Enable Collaboration Across Domain** check box.

i. For security, browsers do not allow scripting across domains. If the agent tries to load a page that is not on the same domain as IM, the agent can view the page but cannot make any changes to the page. To get around this security feature, click this check box and re-save the **Request a Chat** page. Therefore, the next time the customer opens the chat page, the customer can also download an ActiveX dll. This allows the agent to interact with **any** Web page that the customer opens through the chat page, regardless of the domain.

ii. Normally, when a customer opens the chat page, they see a single browser window that is split into two frames. The frame on the left contains the chat screen. The frame on the right displays a Web page (such as a chat push page). By enabling Collaboration Across Domains, the customer has two separate browser windows; one for the chat screen, and one for the chat push page.

7. Click **OK**.

You can edit your Web pages to enable or disable collaboration for individual page elements. For example, remove collaboration on a specific text box to prevent an agent from viewing a password entered by a customer. See "Collaboration and Push Pages" below.

Collaboration and Push Pages

Collaboration allows an agent and a customer to view and interact with the same Web page at the same time during a chat session. For example, an agent can push a Web page so that it appears on the customer's screen, and (using collaboration) watch or help as the customer navigates a Web site, fills out forms, and so forth.

Collaboration essentially means that CCA updates changes to the agent's Web page in the customer's Web page, and vice versa. For how to enable the collaboration feature, see "To set up a chat project" - Step 6 on page 10-59.

Security Settings

The collaboration feature assumes that both agents and customers have their Internet Explorer (IE) security settings at default levels for both the local intranet (Figure 10-41) and the Internet (Figure 10-42).

- The IE default setting for the Local Intranet is "Medium-Low."
- The IE default setting for the Internet is "Medium."

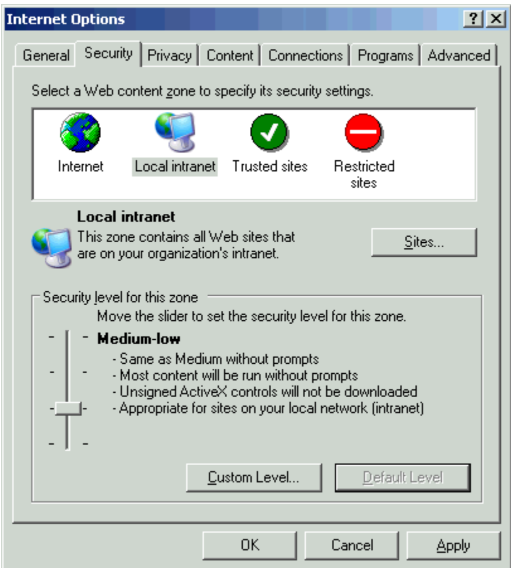


Figure 10-41 IE Settings for Local Intranet

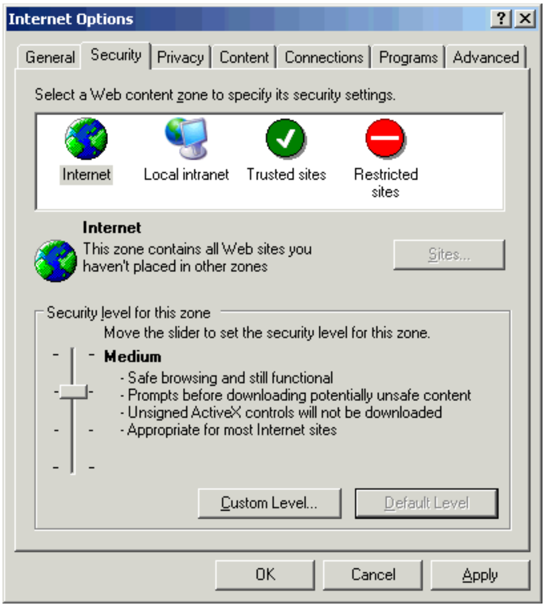


Figure 10-42 IE Settings for Internet

Using Collaboration

In addition to enabling the collaboration feature in AM, edit the element IDs on your Web pages to support collaboration. Also enable or disable collaboration individual elements on the Web page.

1. Any element (text box, radio button, and so forth) to update during collaboration must have a unique, alphabetic or alphanumeric ID. Refer to Table 10-12 for a description of invalid and valid elements.

Table 10-12. Invalid and Valid Elements

Element ID	Description
ID="123"	Not a valid ID because it does not contain any alphabetic characters.
ID="A" ID="A123" ID="1ABC" ID="ABC1" ID="A1BC"	These are all valid IDs.

2. Disable collaboration on a specific element by typing a ***negative number*** anywhere in the ID string.

   For example, if you disable a text box element, the customer can enter data in that field, but the data will not appear on the agent's screen (and vice versa).

   Disabling collaboration on an element is useful if it contains sensitive information, such as a password or Social Security number. Table 10-13 shows the differences between element types.

Table 10-13. Example Element IDs and Descriptions

Element ID	Description
ID="-AB" ID="AB-" ID="A-B"	In these examples, CCA updates the field (collaboration enabled) because the IDs do not contain a **negative number**.
ID="-1AB" ID="A-123B" ID="ABC-3"	Disable collaboration (CCA will **not** update the field) by typing a **negative number** anywhere in the ID string.

Chat Request Forms

An important component of the chat project is the chat form customers use to request a chat with an agent. The Chat Request Form appears in the customer's browser when they click the chat button or chat link on your company's Website. Use AM to generate the code that produces the Chat Request Form.

When creating a Chat Request Form, the URL to access the AM login page must include a fully qualified host name (such as ***http://myserver.mydomain.com/***). If you accessed AM through a URL alias or through an abbreviated host name (such as ***//myserver/***), your customers will be unable to access your form.

To create a customer chat window

1. Open the Chat Project created in “Adding Chat Interactions to a Project” on page 10-56.

2. Click the **Create Page...** button.

   AM displays a sample chat request form template (Figure 10-43).

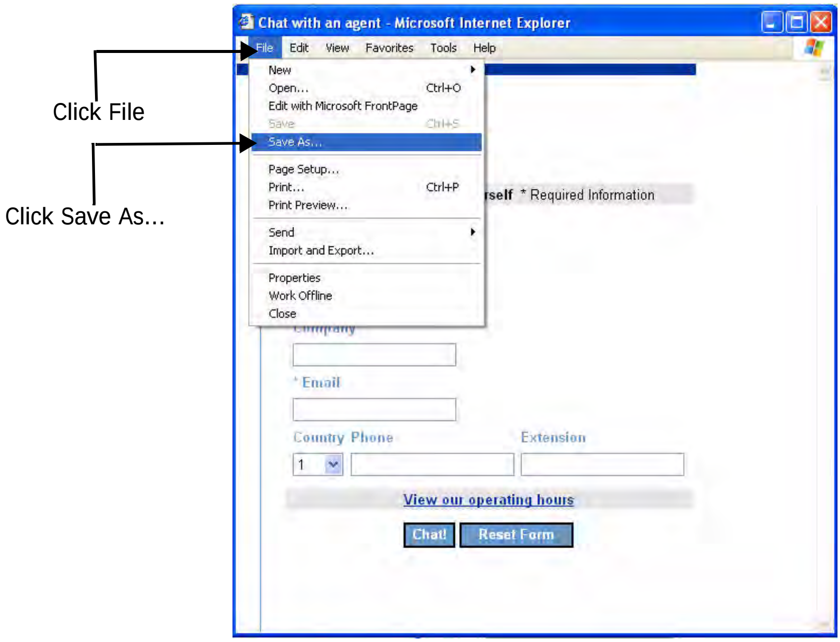


Figure 10-43 Sample Chat Request Form Template

3. Click **File** > **Save As...** and save the file to your local drive.

4. Edit and save the .HTML file created so that the customer Chat Request Form meets the company’s specifications.

5. Copy the .HTML file to the Web server providing call center services for your company.

You must store the file in the ***root*** folder of the Web server, or in a subdirectory of the root folder.

---

6. Create a link on your company's Web page to the .HTML file on the Web server.

Now, when a customer clicks the link, the Chat Request Form appears in the customer's browser, allowing the customer to request a chat with an agent working on the project.

Adding Email Interactions to a Project

For agents and supervisors to receive email interactions, you must set up at least one project for email.

If agents and supervisors are receiving email spam, limit spam emails by using filtering rules and third party software on your POP3 servers.

To set up an email project

1. Click **Options** > **Projects** > click the Project to set up > click the **Edit** button. The Edit Project screen appears.

2. Click the **Email** tab and then check the **Enable Email Project** check box. The Email Servers Subtab screen (Figure 10-44) appears.

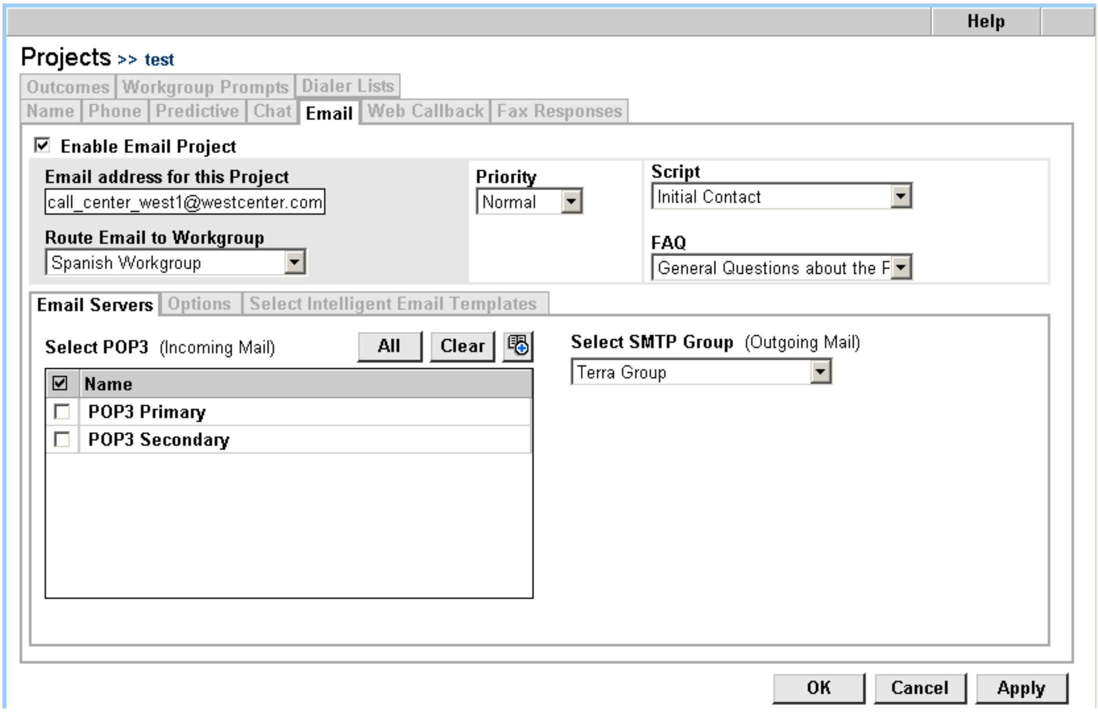


Figure 10-44 Email Tab - Email Servers Subtab

3. Use the information in Table 10-14 to complete the fields.

Table 10-14. Email Servers Subtab Fields and Descriptions

Field	Description
Email address for this Project	Type the address customers write to reach this call center project. **Note:** Do not use an email client to access the project email address. Doing so prevents CCA from accessing the account to route customer emails to agents.
Route Email to Workgroup	From the drop-down menu, select the workgroup where CCA will route the emails.

Table 10-14. Email Servers Subtab Fields and Descriptions

Field	Description
Priority	From the drop-down menu, select the priority level to assign to interactions reaching this email project. **Note**: CCA routes interactions (routed to workgroups through a project) with High priority to an agent before routing interactions (reaching the same workgroup through a project) with a Low priority.
Script FAQ	From the drop-down menus, select the script and FAQ URLs to display on the agent's screen upon receiving the email interaction.
Select POP3 All Clear POP3 Icon	Check the servers to handle incoming email. Click **All** to select all the POP3 servers. Click **Clear** to clear all the check boxes. Click the **POP3 icon** to create a new POP3 sever and add it to the POP3 Library. (For how to create POP3 servers, refer to "Creating a POP3 Server Library" on page 4-66.) CCA employs the servers using a round-robin method. If one server is busy, CCA uses the next selected server, and so on. **Note**: If one or more POP3 servers do not appear in the list, make sure you did not specified them for use in another project. POP3 servers cannot be shared among projects.
Select SMTP Group	From the drop-down menu, select the SMTP Server Group to handle outgoing email for this project. CCA employs the servers in the selected group using a round-robin method. If one server is busy, CCA uses the next server, and so on. (For how to create an SMTP Server group, see "Creating an SMTP Server Group Library" on page 4-64.)

4. Click the **Options** subtab (Figure 10-45).

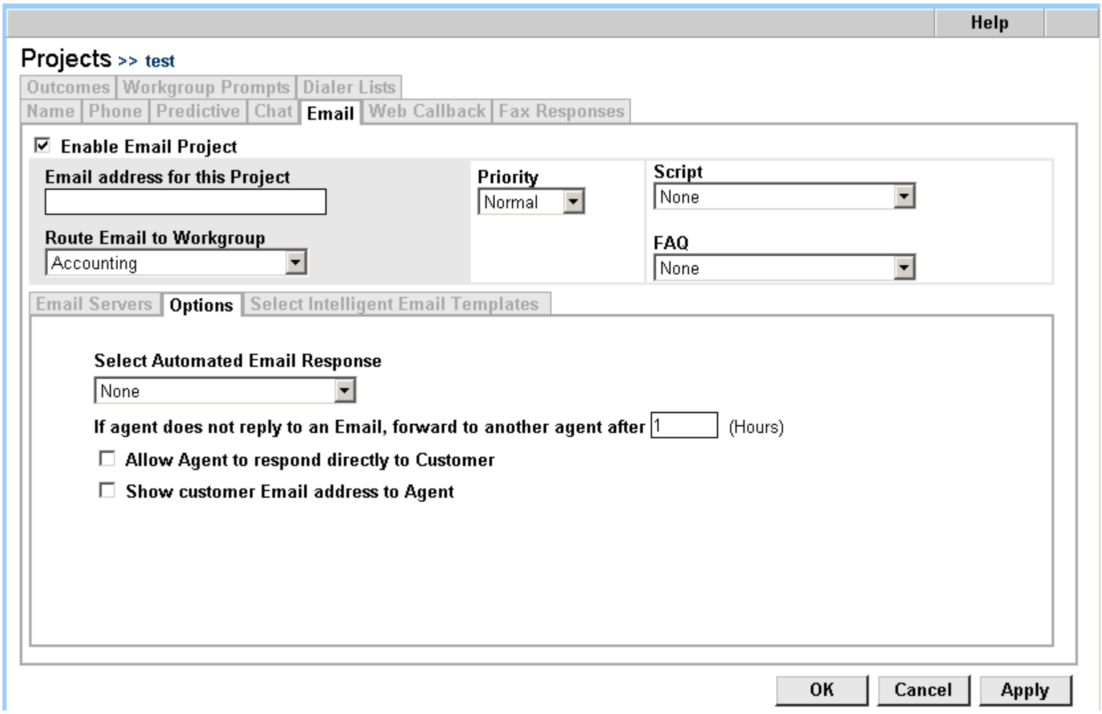


Figure 10-45 Email Tab - Options Subtab

5. Using the information in Step 10-15 on page 10-69, complete the fields.

Table 10-15. Options Subtab Fields and Descriptions

Field	Description
Select Automated Email Response	From the drop-down menu, select a number for the **Automated Email Response** to send to the customer. CCA sends the response to the customer only after the downloading the email message from the POP Server. Messages received by the POP Server, but not yet downloaded into CCA do not receive an acknowledgment of receipt.
If Agent does not reply to an Email, forward to another Agent after ___	Type the number of hours to wait for an agent to reply to an email interaction before forwarding the interaction to another agent.

Table 10-15. Options Subtab Fields and Descriptions

Field	Description
Allow Agent to Respond Directly to the Customer___	Check to allow CCA to send email correspondence directly between the agent and the customer. This provides a means for the customer to communicate with the same agent on all subsequent emails. **Note**: Selecting this option removes prevents CCA from setting alarms on late agent response times and also eliminates recording, tracking of client history, and reporting functionality (after the first reply to the customer) for this project.
Show customer email address to Agent	Check to allow agents receiving email interactions to see the email address of the customer in IM, see it in the FROM address in their email client, and to allow CCA to automatically record the email interaction in the History for the email customer's contact record (if one exists). Clear this option so that CCA will not show the agents the customer's email address in IM (shows only "ACD Email") and so that the agents cannot see it in the FROM address in the agent email client. (Agents can still reply to the customer, but they will not know the destination address of the reply.) **Note**: If you select **Allow Agent to Respond Directly to the Customer**, then CCA automatically selects this option by default.

6. Click the **Select Intelligent Email Templates** subtab (Figure 10-46).

   Use this subtab to associate Intelligent Email Templates with an Email Project. (For how to create these templates, see "Creating an Intelligent Email Template Library" on page 4-70.)

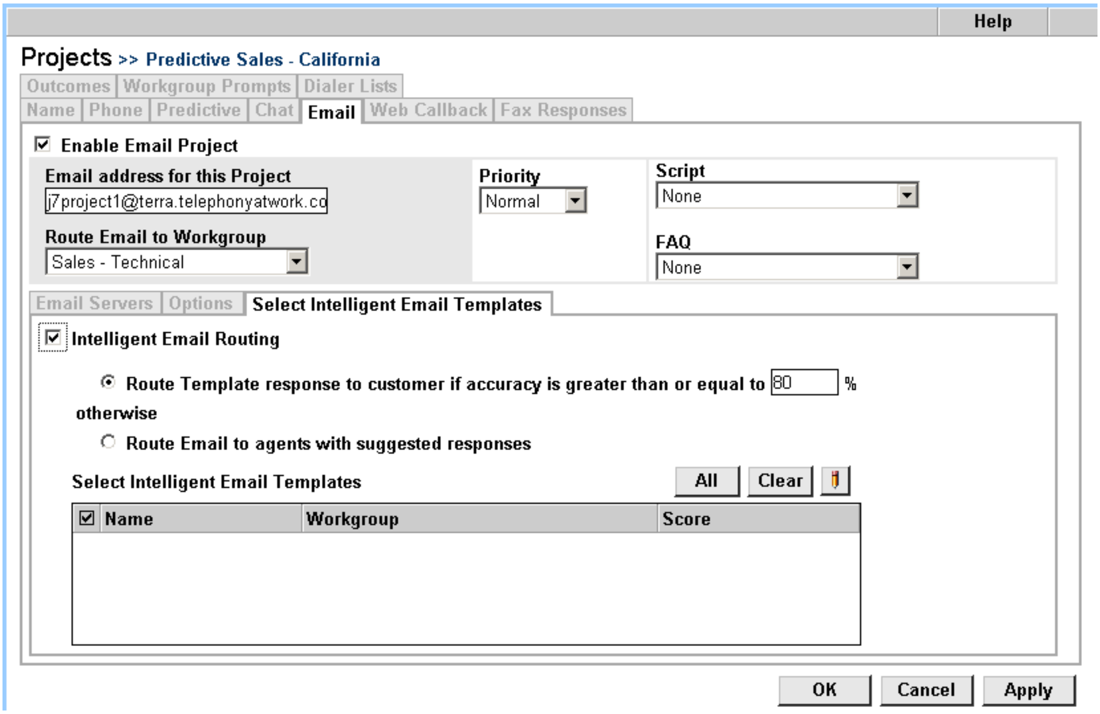


Figure 10-46 Email Tab - Select Intelligent Email Templates Subtab

7. Check **Intelligent Email routing.**

8. Using the information in Table 10-16, complete the fields.

Table 10-16. Select Intelligent Email Templates Subtab Fields and Descriptions

Field	Description
Route Template response to customer if accuracy is greater than or equal to ____%	Click to automatically send the Automated Email Response associated with the highest-scoring Intelligent Email template (see “Creating an Intelligent Email Template Library” on page 4-70) with a score higher than the value you specify in the percentage box. (For an description of how CCA calculates scores for each Intelligent Email template, see “Example Intelligent Template Example” on page 4-72.)

Table 10-16. Select Intelligent Email Templates Subtab Fields and Descriptions

Field	Description
	If no templates yield an accuracy level above the specified value, CCA routes the email to an agent in the specified workgroup with a scored list of suggested responses based on all of the Project's Intelligent Email templates.
Route Email to agents with suggested responses	Choose to always route the email to an agent in the specified workgroup with a scored, editable list of suggested responses based on all the Project's Intelligent Email templates.
Select Intelligent Email Templates	Check to assign an email to the project. Click **All** to select all the templates. Click **Clear** to clear all the check boxes. Click the Email icon to create a new template to add to the library. (For how to create a new email template, see "Creating an Intelligent Email Template Library" on page 4-70.)

9. Click **OK**.

Adding Web Callback Interactions to a Project

Web Callback Projects handle Web-based customer requests for a return phone call and control:

- How to route the call-back request
- The Web pages to display to the customer
- The Web pages to provide to agents for sending to customers

To set up a Web callback project

1. Click **Options** > **Projects** > click the Project to set up > click the **Edit** button. The Edit Project screen appears.
2. Click the **Web Callback** tab and then click **Enable Web Callback Project** check box. The Web Callback screen (Figure 10-47) appears.

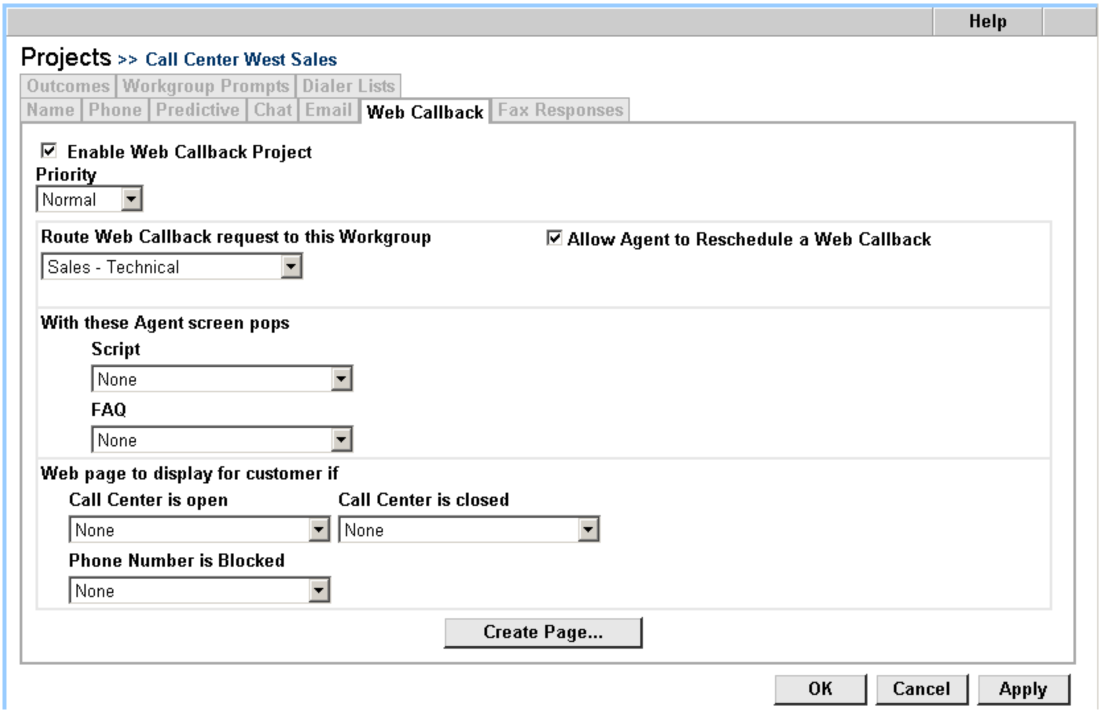


Figure 10-47 Web Callback Tab

3. Using the information in Table 10-17, complete the fields.

Table 10-17. Web Callback Fields and Descriptions

Field	Description
Priority	From the drop-down menu, select the priority level to assign to interactions reaching this Web callback project. CCA routes interactions (routed to Workgroups through a Project) with High priority to an agent before routing interactions (reaching the same workgroup through a project) with a low priority.
Route Web Callback request to this Workgroup	From the drop-down menu, select the workgroup containing the agents that will handle Web callback requests coming into this project.

Table 10-17. Web Callback Fields and Descriptions

Field	Description
Allow Agent to Reschedule a Web Callback	Check to allow agents to reschedule a callback after ending the call. If unchecked, the agent will not have the option of rescheduling the callback. **Note**: If checked, you must re-create and redeploy the Web callback page.
Script	From the drop-down menu, select the script to display to agents receiving Web callback requests for this project.
FAQ	From the drop-down menu, select the FAQ content to display to agents receiving Web callback requests for this project.
Call Center is open	From the drop-down menu, select Web page to display after CCA successfully delivers the Web callback request to an agent. (For how to set business hours for your company, see "Setting Company Business Hours" on page 3-20.)
Call Center is closed	From the drop-down menu, select Web page to display during non-business hours or if no agents are logged into CCA. (For how to set business hours for your company, see "Setting Company Business Hours" on page 3-20.)
Phone Number is Blocked	If a customer's phone number is blocked and the customer enters that number in the "Request a Callback" page and clicks the "Call Me!" button, the Web page you select here appears in the customer's browser window. You can add a customer's phone number to the blocked list using AM (see "Creating a Call Blocking List" on page 14-2), but you can also add numbers to the blocked list using IM and SM.

4. Click **OK**.

Web Callback Request Form

An important part of a Web callback project is the online form customers use to request a callback from an agent. The Callback Request Form appears in the customer's browser when they click the "Request a callback" button or link on the company's Website. You can use AM to generate the code that produces the Web callback request form.

When creating a Web Callback Request Form, the URL to access the AM login page must include a fully qualified host name (such as ***http://myserver.mydomain.com/***). If you accessed AM using a URL alias or an abbreviated host name (such as ***//myserver/***), your customers will be unable to access the form you create.

To create a customer Web Callback Request form

1. Open the Web Callback Project you created on page 10-72.

2. Click the **Create Page** button. A sample customer Callback Request Form (Figure 10-48) appears.

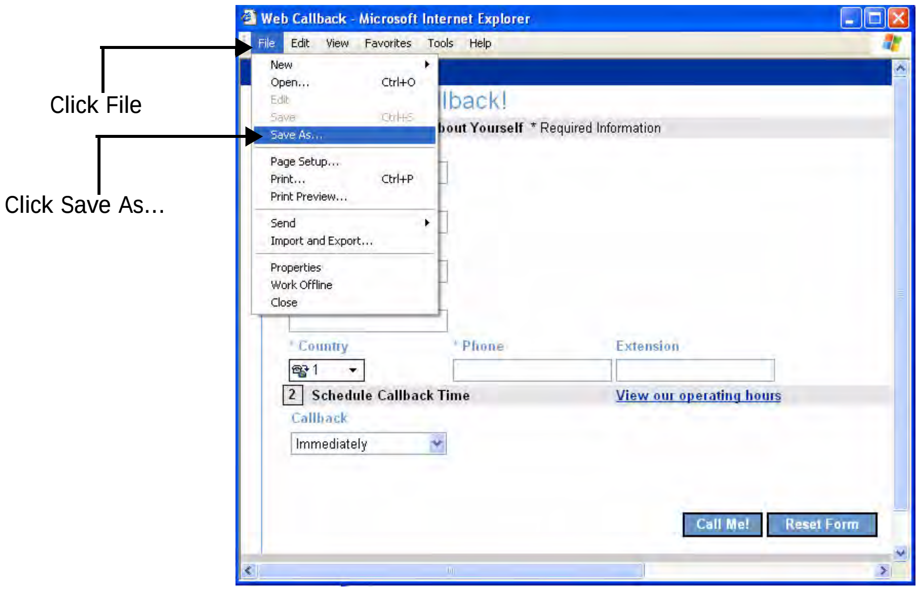


Figure 10-48 Sample Web Callback Request Form Template

3. Click **File** > **Save As...** save the file to your local drive.

4. Edit and save the .HTML file so that the Callback Request Form meets your company's specifications.

5. Copy the .HTML file to the Web server providing call center services for the company.

You must store the file in the ***root*** folder of the Web server, or in a subdirectory of the root folder.

---

6. Create a link on the company's Web page to the .HTML file on the Web server.

Now, when a customer clicks the link, your Callback Request Form appears in the customer's browser, allowing the customer to enter and send the information necessary for an agent to call them back.

Selecting Fax Responses for the Project

Select the fax responses to provide agents working on a project.

To select fax responses for a project

1. Click **Options** > **Projects** > click the Project to edit > click the **Edit** button. The Edit Project screen appears.

2. Click the **Fax Responses** tab (Figure 10-49).

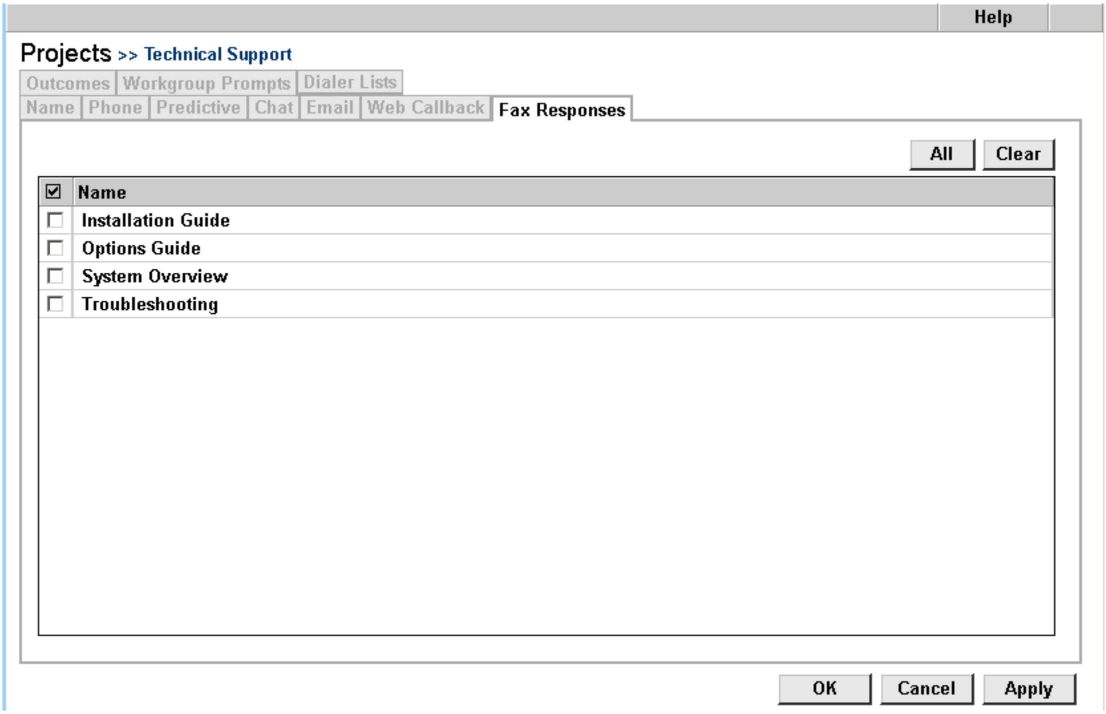


Figure 10-49 Fax Responses Tab

a. Select the Fax Response for this project by clicking the box next to its name.

b. To assign all faxes to the Project, click the **All** button.

c. To remove all faxes from the Project, click the **Clear** button.

3. Click **OK.**

Selecting Interaction Outcomes for the Project

Tracking the results of call center interactions helps measure and compare the performance of agents. Enable the Outcomes feature (see “Require outcome” on page 6-10) to create reports for analyzing the results of all interactions handled by agents.

- Set Outcomes as a requirement for agents (**Options** > **Agents** > **Controls and Restrictions** tab > **Require Outcome** check box).
- Create one or more outcomes (**Libraries** > **Outcomes**).
- Add required outcomes to the project (see below).

To add outcomes to a project

1. Click **Options** > **Projects** > click the Project to edit > click the **Edit** button. The Edit Project screen appears.
2. Click the **Outcomes** tab (Figure 10-50).

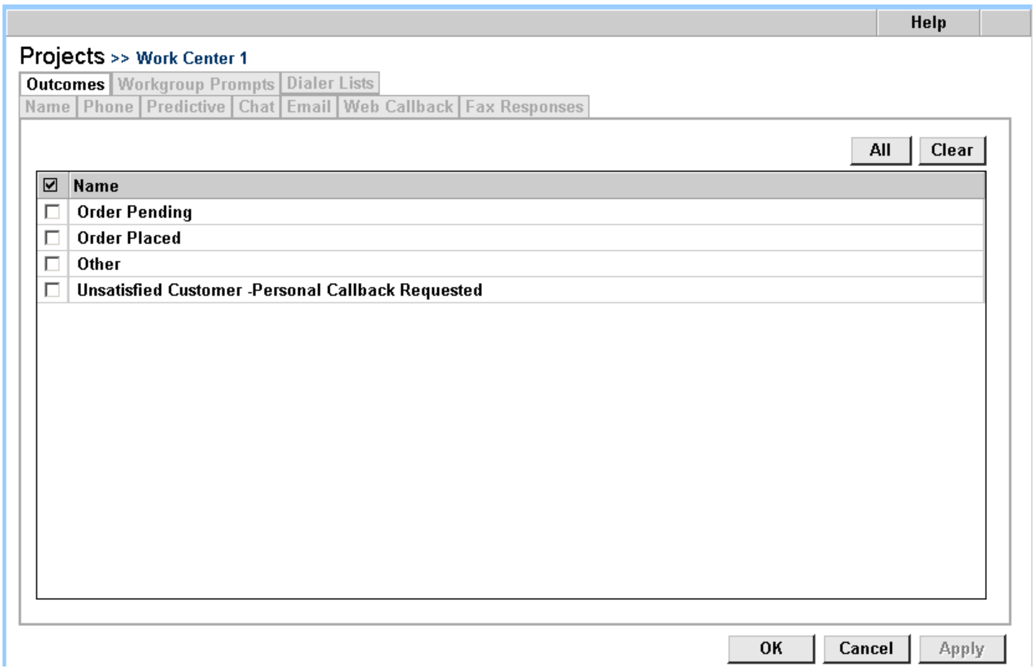


Figure 10-50 Outcomes Tab

a. To select an outcome for this project, click the check box next to its name.

b. To assign all outcomes to the project, click the **All** button.

c. To remove all outcomes from the project, click the **Clear** button.

3. Click **OK.**

Overriding Workgroup Prompts for the Project

When CCA routes a phone customer to a workgroup queue, CCA greets the caller and keeps them informed with recorded prompts while they wait to be connected to an agent. Identify the workgroup prompts to play for the caller when setting up the workgroup (see “Setting Workgroup Options” on page 7-14).

For each project, AM lets you override the default prompts for the workgroups. Overriding the default workgroup prompts allows you to control the prompts that customers hear when they reach workgroups through the project.

To override workgroup prompts for a project

1. In AM > click **Options** > click **Projects** > click the Project to edit > click the **Edit** button. The Edit Projects screen appears.

2. Click the **Workgroup Prompts** tab (Figure 10-51).

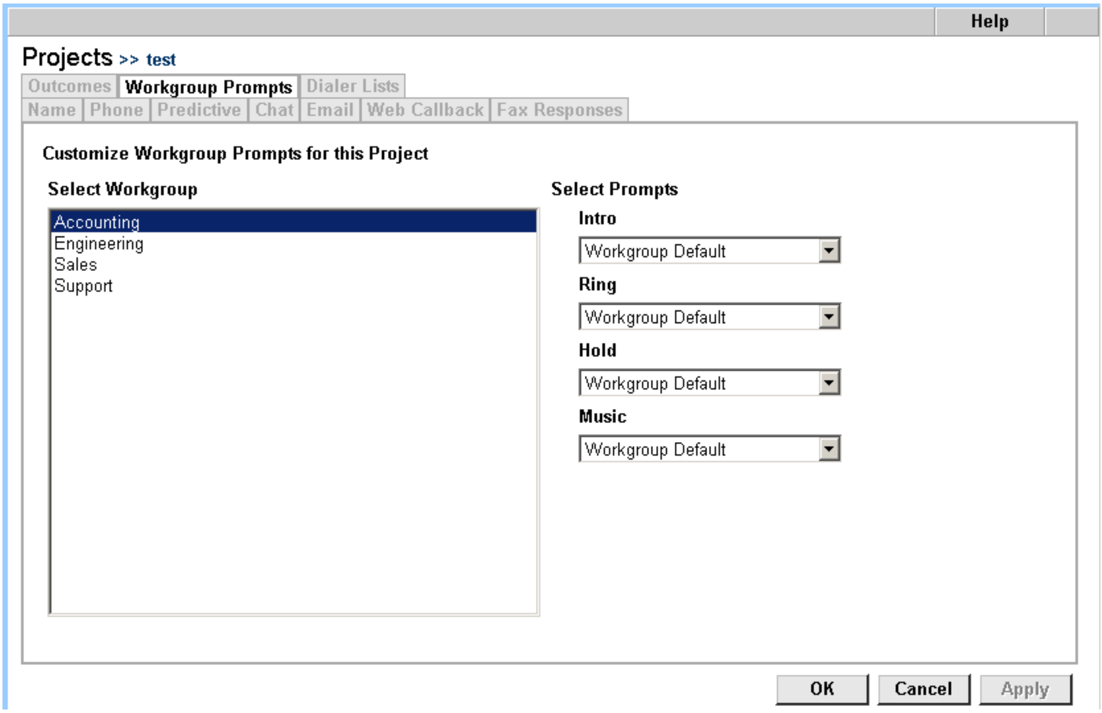


Figure 10-51 Workgroup Prompts Tab

3. Using the information in Table 10-18, complete the fields.

Table 10-18. Workgroup Prompts Tab Fields and Descriptions

Field	Description
Select Workgroup	Click the workgroup to override prompts for, if the caller reaches the workgroup through this project.
Intro	From the drop-down menu, select the initial greeting CCA plays the caller when entering the workgroup.
Ring	From the drop-down menu, select the prompt CCA plays when an agent becomes available and CCA is in the process of connecting the caller to the agent.

Table 10-18. Workgroup Prompts Tab Fields and Descriptions

Field	Description
Hold	From the drop-down menu, select the message CCA plays for the caller while the caller waits to be connected to an agent. **Note**: CCA does not play this prompt until after the prompt selected for **Music** finishes playing.
Music	From the drop-down menu, select the prompt CCA plays immediately after the **Intro** message while the caller waits to be connected to an agent. When the **Music** prompt finishes playing, the **Hold** prompt plays. CCA then cycles the **Music** and **Hold** prompts continuously until an agent becomes available.

4. Click **OK**.

5. Repeat steps 2 to 6 to customize the prompts in other projects.

Adding Dialer Lists

A Dialer List is a CSV (comma separated variable) file that contains the names and phone numbers of customers to call in a predictive project. There are only a few restrictions on what a dialer list looks like:

- The Dialer List must be in CSV format.
- The Dialer List must have at least one column containing phone numbers and at least one column for the country code.

Adding a Dialer List to a Project consists of

1. Telling CCA where the CSV file resides on the hard drive.
2. Set the Select Fields list boxes (see below).
3. Map the columns in the Dialer List to the fields in the Contact Template the project uses.

About Contact Templates

Every project uses a Contact Template.

Information about templates in general (and particularly Contact Templates) begins with “Creating New Display Templates” on page 4-38. It will be easier to understand this section if you are already familiar with how Contact Templates work.

CCA associates a Contact Template with a project to format the contact information that agents and supervisors use and to support other features (such as auto-assignment). Refer to the Interaction Manager User’s Manual, Contacts Management section for more information.

Select the Contact Template for a project from the Name tab:

> **Options** > **Projects** > **Name** tab > **Select Contact Template for this Project**

When uploading a dialer list to a project, you must give AM some information about what the dialer list looks like. Do this by associating (or mapping) the columns in the dialer list with fields in the Contact Template. This mapping allows AM to do some intelligent processing of the dialer list. For example, mapping allows CCA to know that one or more columns in the dialer list contain phone numbers, which are processed differently than other data.

The “Select Field” List Boxes

Six list boxes appear at the top of the Dialer List tab. The settings in these boxes apply to **all** of the dialer lists in your Project.

1. **Select Phone Field**

   The phone number to call during predictive dialing.

   > For example, the dialer list may have one column for the customer’s work phone and another column for their home phone. Use this box to tell CCA which number to call during predictive dialing.

2. **Select Pattern Matching Field:**

   The drop-down menu provides all fields in the system contact template. You can select any field to use for pattern matching.

3. **Select Last Name Field**

4. **Select First Name Field**

   These two fields point to the customer’s first and last names and make predictive dialing more efficient.

   When an agent is connected to a predictive call, the customer’s entire record appears to the agent. It is not efficient to retrieve all customer information before the agent takes the call, since there might be no answer, a busy signal, or so on. However, when the agent does take a call, it might take a few seconds to retrieve the entire customer record.

   To make efficient use of memory and to give the agent some information up front, select First Name and Last Name in these fields. The agent can always see the name of the customer being dialed. When they are connected to the customer, CCA displays the rest of the record.

5. **Select Company Name Field**

   If the dialer list has a company name field, select it here. CCA displays the company name of the contact to the agent when they receive a predictive or preview call.

6. **Other Field**

   The “Other” field does two things:

   a. It takes any column of data from the dialer lists and loads it into the Contacts table in the CCA database.

   b. During predictive/preview dialing, CCA passes the current value of this “Other” field as a parameter to IM, where it can be displayed.

Below are examples of how the Select Phone Field list box works and how the Other Field list box works. Find additional examples in the “Examples of Predictive Dialing Schedules” on page 10-28.

Example 1: Using the Select Phone Field list box

1. Click **Options** > **Projects** > **Name** tab.

2. In the Select Contact Template for this Project field, make sure to select **System Contact**. The project is now using the default System Contact Template.

3. Click **Options** > **Projects** > **Predictive** > **Dialer List** subtab.

4. From the **Select Phone Field** drop-down menu, select the phone location (Figure 10-52).

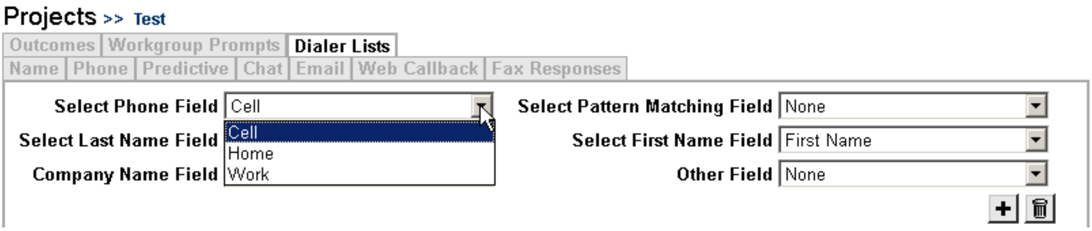


Figure 10-52 Three Entries in List Box

Unless you edited the System Contact Template, three entries should appear: Cell, Home, and Work.

5. Open the System Contact Template.

    a. Click **Libraries** > **Display Templates**. A list of templates appears.

    b. Double-click on **System Contact**. The Edit Display Templates screen appears.

    c. Click the **Layout** tab (Figure 10-53).

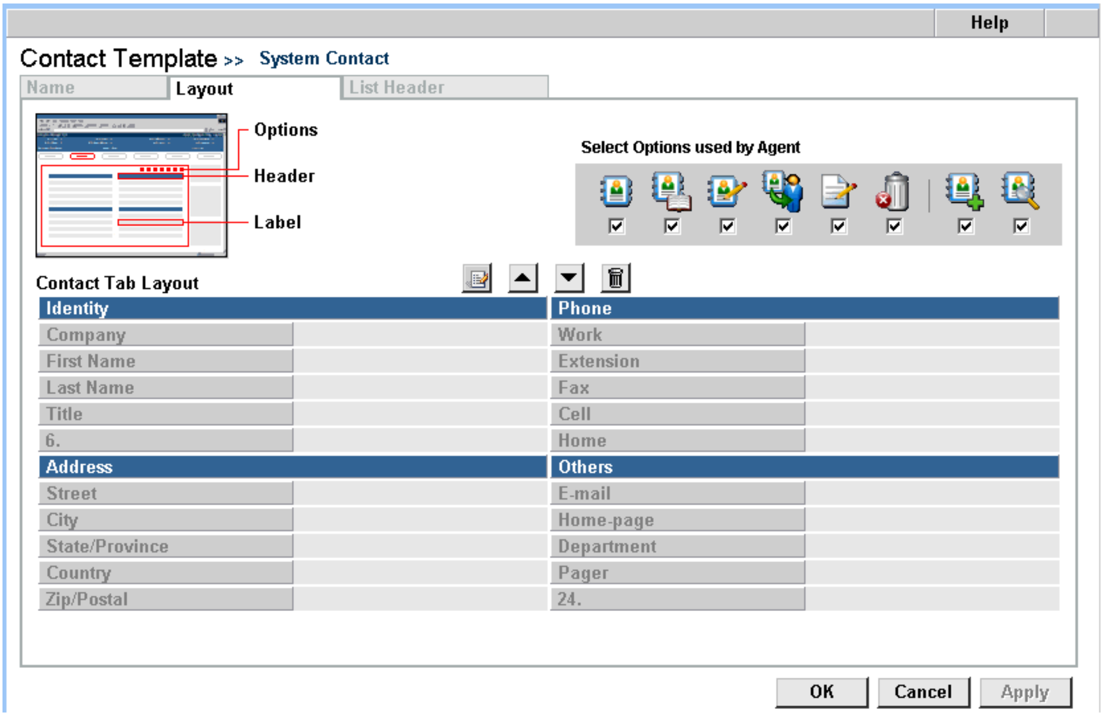


Figure 10-53 System Contact Template - Layout Tab

The System Contact Template has three fields for phone numbers: Work, Cell, and Home.

These same fields appear when clicking the **Select Phone Field** in the **Project** > **Dialer List** tab.

6. Double-click the **Work** field.

   The Defined Label dialog box (Figure 10-54) appears.

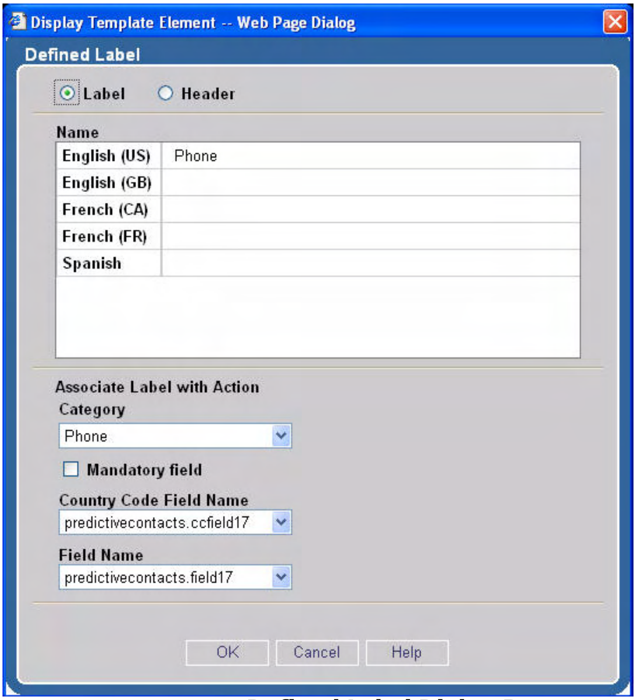


Figure 10-54 Defined Label Dialog Box

Notice that the **Associate Label with Action** list box is set to **Phone**. This tells CCA to give special attention to the data in this field. With an Action Type of Phone, CCA knows this field holds a phone number that it can dial.

How the **Dialer Lists tab > Select Phone Field** works

1. It goes to the Contact Template for this project.
2. It finds all fields in the template with an Action Type of Phone.
3. It puts those fields in the Select Phone Field list box.

The other "Select Field" list boxes in the Dialer List tab work the same way: Select First Name takes all the fields from the Contact Template with an Action Type of "First Name." Select Last Name takes all the fields from the Contact Template with an Action Type of "Last Name," and so on.

CCA works this way for two reasons:

1. The dialer list might have more than one column for phone numbers (such as Work and Home), but CCA must know which column to use for dialing.

2. The same project might have several dialer lists with different formats. You might want CCA to call numbers from column 3 in the first dialer list and numbers from column 4 in the second dialer list.

The mapping feature, along with the “Select Field” list boxes, are two of the ways to control how to set up dialer lists.

Example 2: Using the “Other” Field list box

Use the “Other” Field list box to add any column from the dialer list to the database. During predictive dialing, CCA takes the value of the “Other” field from the current contact and pass it to IM through a custom Web page you create yourself. Once the Web page receives the “Other” value, it displays it, performs a database search on the value, and so on.

1. Create a custom web page:

a. Your custom Web page must have code that can extract the parameters CCA passes to it.

b. Here is some sample code that parses and displays all of the parameters CCA passes to IM during Predictive dialing:

```
<html>
  <head>
    <meta http-equiv=”pragma” content=”no-cache”>
    <meta http-equiv=”Cache-Control” content=”no-cache,
       must-revalidate”>

    <title>Preview Params Test Page</title>

  <script language=”JavaScript”>
     function getArgs()
     {
       var retVal = ‘’;
       var args = new Object();
       var query = location.search.substring(1);
       var pairs = query.split('&');
       for(var i = 0; i< pairs.length; i++)
       {
          str = pairs[i] + '\n';
          retVal += str;
```

```
        }
        textAreaArgs.value=retVal;
        }
  </script>
  </head>
  <body onload="getArgs()">

    <TEXTAREA wrap="off" id='textAreaArgs' cols="50"
       rows="30" width="100%"></TEXTAREA>
  </body>
</html>
```

2. **Create a Library URL that points to your custom Web page:**

   a. Select **Options** > **URLs**, then click the **Add** button.

   b. In the Add URL screen:

      i. Type a name and description for the custom Web page.

      ii. In the URL text box, type the path to the custom Web page.

      iii. Under Select the type of URL, click the **Script** check box.

      iv. Click **OK** to save the changes.

3. **Add your custom web page to the Predictive Project:**

   a. Select **Options** > **Projects > Predictive tab > Options subtab**.

   b. In the **Script** list box, select the URL created in the previous step.

4. **Upload your dialer list**:

   a. See “To upload a Dialer List” on page 10-90 for complete details.

   b. As an example, upload a dialer list that looks like Figure 10-55.

	A	B	C	D	E
1	**First Name**	**Last Name**	**Phone**	**Country Code**	**Customer ID**
2	Doug	Flutie	555-1200	1	44212
3	Drew	Brees	555-1201	1	44213
4	LaDanian	Tomlinson	555-1202	1	44214
5					

Figure 10-55 Uploaded Dialer List

In this example, the Customer ID is a unique identifier for tracking customers in some external (non-CCA) database.

5. **Set the "Other" Field**:

   a. Select **Options** > **Projects > Dialer Lists tab**.

   b. In the Other Field list box, select **Customer ID**.

6. **Start Predictive Dialing**:

   a. See "Starting and Stopping a Predictive Project" on page 10-25.

   b. When a supervisor starts to use the dialer list, CCA calls the first number.

   c. If the call connects to an agent, CCA pushes the custom Web page to IM > Predictive tab > Scripts pane and passes it the value of the "Other" field for the current contact as a parameter (along with several other parameters). In this example, CCA passes the values in the Customer ID column of the dialer list.

   d. After the Web page parses and extracts the value of the "Other" field, it can take any other action. For example, the Web page might look up the Customer ID in some non-CCA database and then spawn another browser window with more information about that customer.

To upload a Dialer List

Before uploading a dialer list:

- A dialer list, in CSV format, with at least one column of phone numbers must exist.
- A company and a project must exist.

1. Click **Options** > **Projects** > **Dialer Lists** tab.
2. Click the plus (**+**) icon. The Add Dialer List dialog box appears.
   a. Type a name for the dialer list.
   b. Click the **Import New List** > **Browse** button and then find the CSV file.
3. Click the **Next** button. The Map Fields to This Contact Template screen (Figure 10-57) appears.

   Associate the columns in the dialer list to fields in the Contact Template. This is an important step because its the only way AM has of understanding what the dialer list data looks like.

   This example dialer list (Figure 10-56) only has three fields: fname, lname, and business phone number. So, those are the only fields to map.

	A	B	C
1	fname	lname	business phone number
2	Steve	Smith	5551212
3	Mike	Jones	5551212
4	Carla	Carluchi	5551212
5	Woody	Ellis	5551212
6			

Figure 10-56 Fields to Map

Notice in Figure 10-57 that:

- The gray fields are from the Contact Template the project uses.
- The fields in the list boxes are from the columns in the dialer list.

a. Click the list box next to First Name. All of the columns in the dialer list appear.

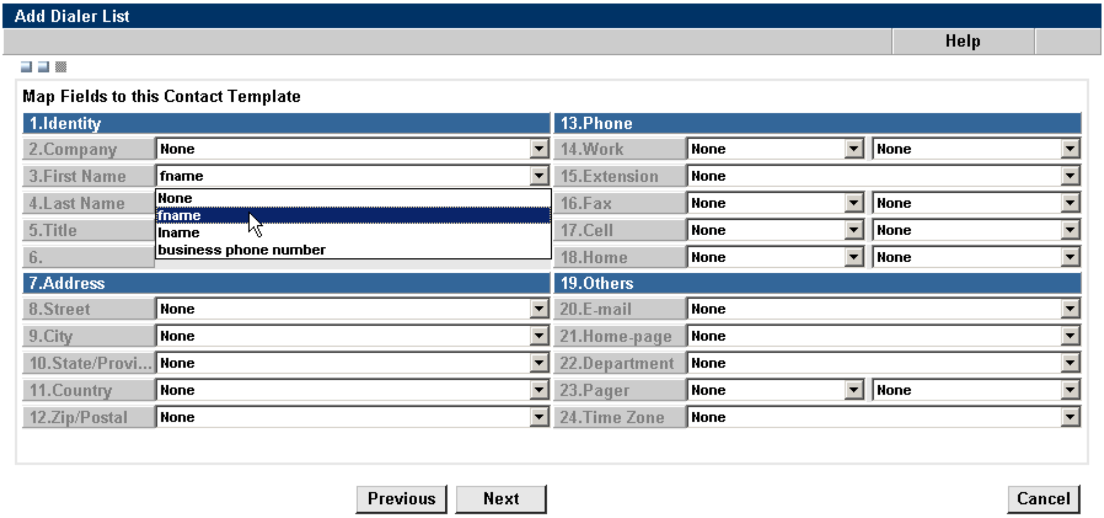


Figure 10-57 Mapping Dialer List Columns to the Contact Template

As an example, refer to Table 10-19 to make the following map:

Table 10-19. Contact Template Fields and Corresponding Dialer List Columns

Contact Template Field	Dialer List Column
First Name	fname
Last Name	lname
Work	business phone number

CCA copies only the fields that you map from the dialer list CSV file into the CCA database. You can map as many or as few fields as you wish (as long as you map at least one phone field). If you do not map a field, agents cannot see it when they connect to a predictive call.

The names of the columns in the dialer list are not important. What matters is the data in those columns and which Contact Template fields you map them to.

Each phone number field in the Mapping dialog box has two parts. The first part is for a dialing prefix (such as **1**) - if a separate column exists in the dialer list. The second part is for the main part of the number (such as **5551212**).

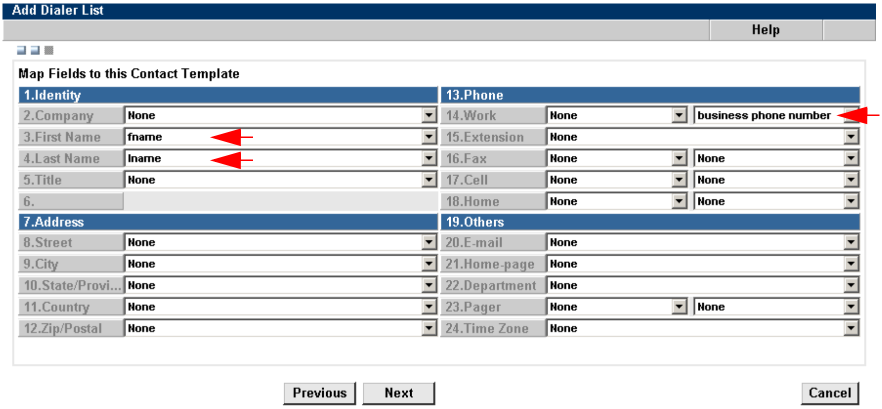


Figure 10-58 Mapping Dialer List Columns to the Contact Template

b. Click **Next** and then click **Upload**.

c. After the dialer list finishes uploading, click **Close Window**. The CSV file appears in the Dialer List tab (Figure 10-59).

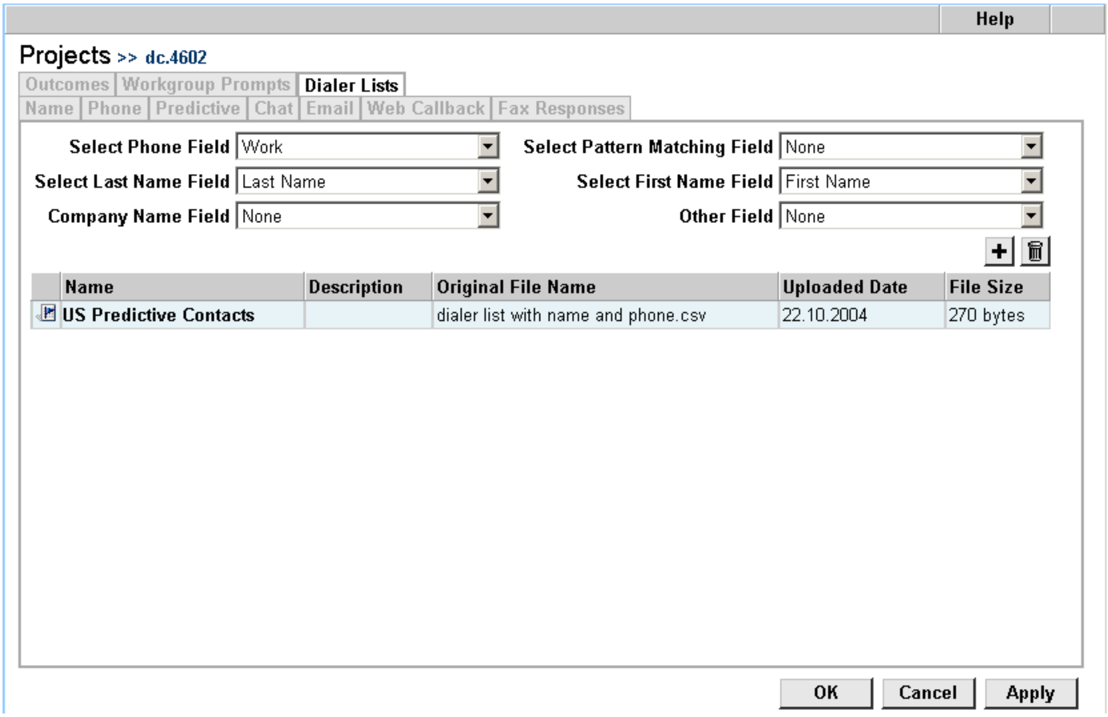


Figure 10-59 Dialer List Tab After Uploading Dialer List

4. Set the **Select Field** list boxes at the top of the Dialer List tab. (For how to set these fields, see “The “Select Field” List Boxes” on page 10-82.)

The Dialer List upload is complete.

Setting Up Project Schedules

Set up Project Schedules for handling and routing interactions differently during different times. Use Project Schedules to tailor call routing strategies to reflect the company's business practices over the course of a week or over a 24-hour day.

Before creating Project Schedules, projects must already exist. For how to set up projects, see "Creating a Project Definition" on page 10-1.

Creating Project Schedules

Create, edit, and implement Project Schedules from AM.

To create a project schedule

1. Click **Options** > **Schedules**. A list of schedules appears.
2. Click the **Add** button.

   The Add Schedules screen (Figure 11-1) appears.

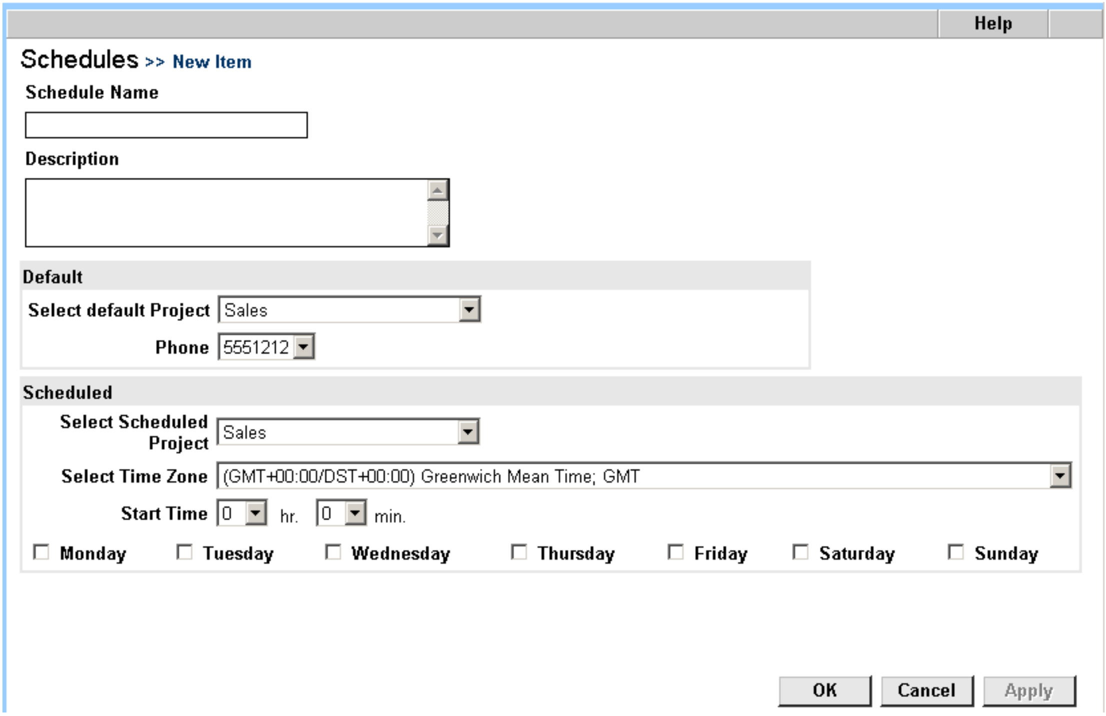


Figure 11-1 Add Schedules Screen

3. Using the information in Table 11-1, complete the fields.

Table 11-1. Add Schedule Fields and Descriptions

Field	Description
Schedule Name	Type a name for the schedule.
Description	Type a description (or purpose) of this schedule.
Select default Project	From the drop-down menu, select the Project definition to disable when the Scheduled Project (see below) starts.
Phone	From the drop-down menu, select the country code and phone number to assign to the **Scheduled Project** (see next field). **Note**: This phone number replaces the “dummy,” or empty phone number supplied when defining this project (see “Setting up Shared-Number Phone Projects for Scheduling” on page 10-14).

Table 11-1. Add Schedule Fields and Descriptions

Field	Description
Select Scheduled Project	From the drop-down menu, select the project to activate during the scheduled times. This project runs, using the phone number from the **Phone** field until another scheduled project starts, or until you delete the schedule.
Select Time Zone	From the drop-down menu, choose the time zone to use when starting the scheduled project. CCA begins running the scheduled project at the Start time (see next field) in this time zone.
Start time	From the drop-down menu, select the time of day to activate the project. **Note**: Time is in 24-hour notation (where13:00 is 01:00 p.m.) in the time zone selected above. CCA starts the scheduled project at the specified start time on the days checked (see next field).
Monday, Tuesday….	Check the day (or days) to run the scheduled project.

4. Click **Apply** to save the schedule.

5. Repeat steps 2 though 4 to finish creating schedules.

6. Click **OK**.

CCA runs the schedule during the specified times until another schedule starts another project or until you delete the schedule.

Because a schedule runs continuously until another schedule starts, it is ineffective to create only one schedule definition. You **must** create a minimum of two schedules to switch between projects.

Project Scheduling Example

One common use of CCA's scheduling capabilities is the routing of after-hours calls directly to voicemail instead of routing to agents who have gone home for the night. Table 11-1 describes two schedules managing two different routing strategies for Jay's Unicycle Company.

Table 11-2 Example Schedules

Schedule Name	Project Name	Schedule	Call Routing Strategy
Business Hours	"Sales"	M - F, 09:00 a.m. - 05:00 p.m.	Routes callers to the Sales Workgroup for handling by an available Sales Agent
Nights and Weekends	"Sales Voicemail"	M - Th, 05:01 p.m. - 11:59 p.m. F, 05:01 p.m. - M, 08:59 a.m.	Routes callers directly to a prompt notifying the caller that the office is closed, and then lets the caller leave a voicemail message.

The first schedule ("Business Hours") activates the "Sales" project, which routes callers to a workgroup for handling by an agent during business hours (Monday - Friday, 09:00 a.m. - 05:00 p.m.).

The second schedule ("Nights and Weekends") activates the "Sales Voicemail" project, which routes callers directly to the voicemail system during non-business hours (Monday - Thursday, 05:01 p.m. - 08:59 a.m. and Friday, 05:01 p.m. - Monday, 08:59 a.m.).

Figure 11-2 shows the schedules screen as it would appear if you were implementing the "Nights and Weekends" schedule described in the Table 11-1.

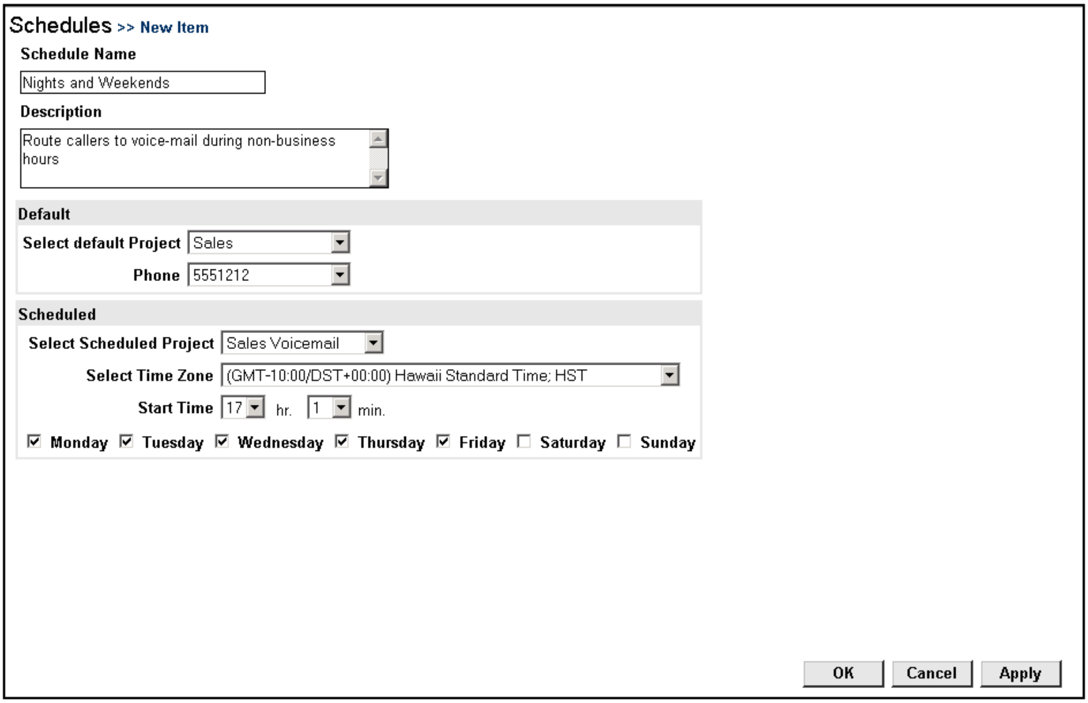


Figure 11-2 Example: Scheduling a Routing Strategy for Nights and Weekends

In Figure 11-2, the “Nights and Weekends” schedule specifies “Sales Voicemail” as the *Scheduled* project; meaning that it runs at the specified time on each selected day of the week. The “Nights and Weekends” schedule continues to run the “Sales Voicemail” Project until another Schedule starts and supersedes it.

To stop routing calls to voicemail and resume routing calls to agents, set up a schedule (such as “Business Hours”), which starts the “Sales” project at 09:00 a.m. Monday through Friday (see Figure 11-3).

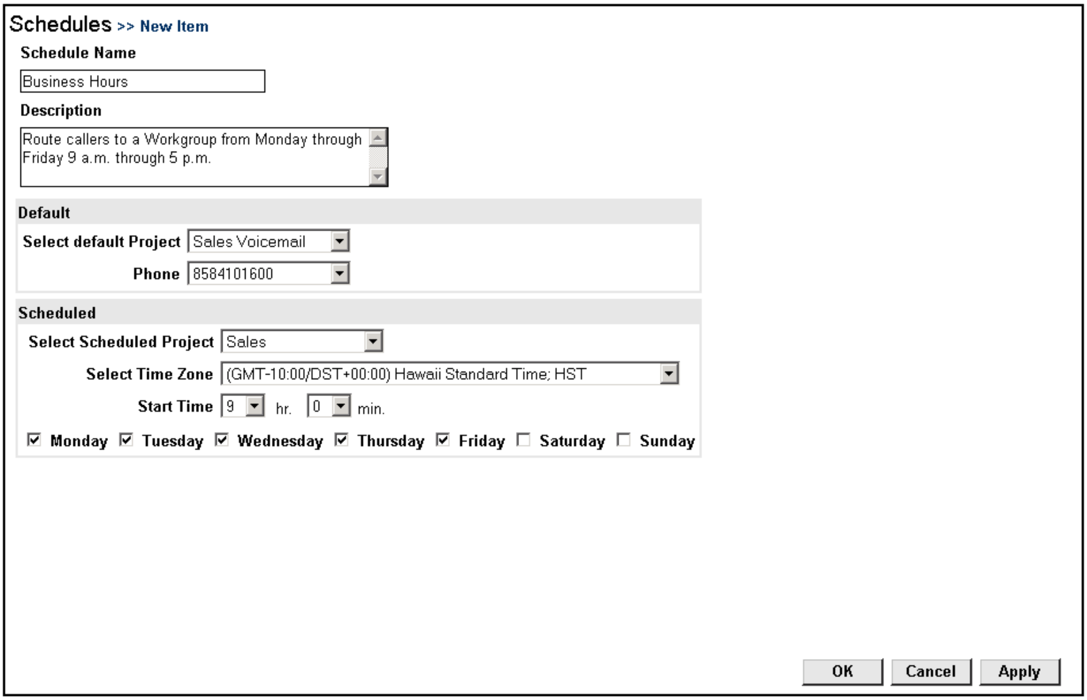


Figure 11-3 Example: Schedule to Resume Call-Routing Strategy for Business Hours

12

Customer Priority

Use AM to prioritize phone customers so CCA handles the most important callers first. As CCA routes callers to workgroup queues and then agents, CCA uses the customer's priority level to determine the customer's position in the queue. CCA places callers with higher priority nearer to the front of the queue than customers with lower priority.

Customer priority only affects interactions CCA routes through a workgroup. For example, if your call center has agents who receive direct inbound calls, customer priority is being circumvented, since CCA has no way of controlling direct inbound calls.

Assigning Priority Levels to Customers

To assign a priority level to a customer, you must know either:

- The customer's ID information
  or
- The customer's telephone number

If you have two customers with different priority levels and a shared phone number, CCA cannot positively identify the customer. In this case, CCA sets the priority of both customers to the level assigned to the first record in the database that matches the detected phone number.

Whenever possible, use Customer ID information that is unique to each customer. This helps CCA accurately identify and prioritize the caller.

To set customer priority

1. Click **Options** > **Customer Priority** > the **Add** button.

   The Add Customer Priority screen (Figure 12-1) opens.

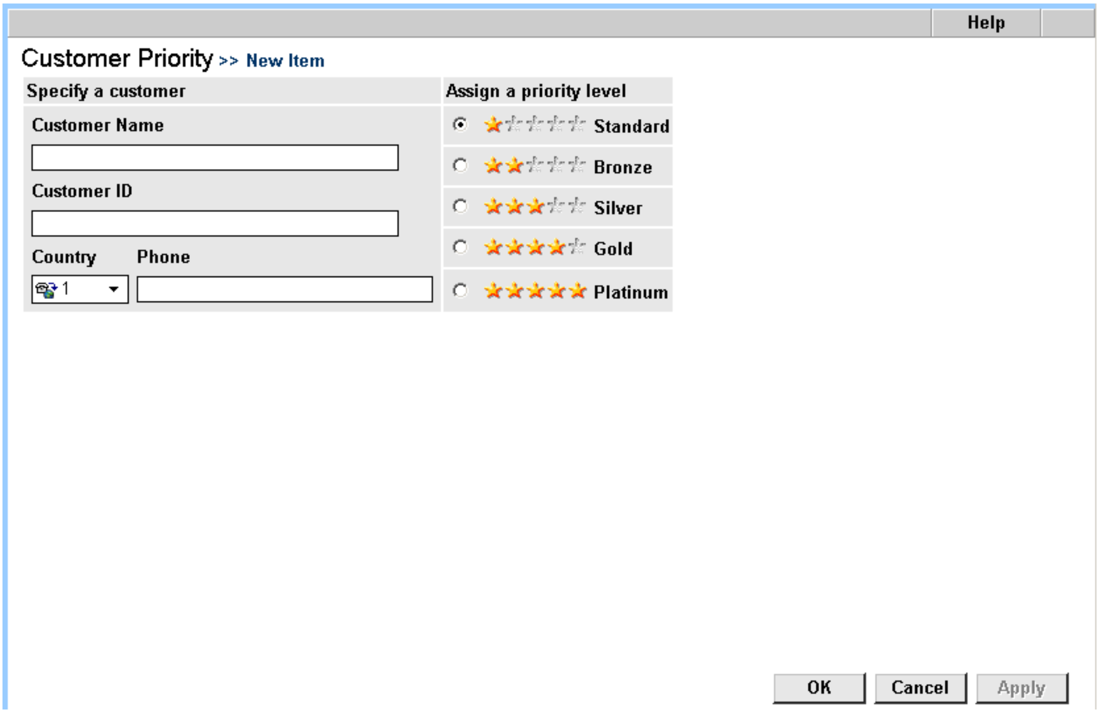


Figure 12-1 Customer Priority Screen

2. Using the information in Table 12-1, complete the fields with the information CCA uses to identify the customer for prioritization.

Table 12-1. Customer Priority Fields and Descriptions

Field	Description
Customer Name	Type the customer's name.
Customer ID	Type the customer's ID. Your project must be configured to require customers to provide an ID for prioritization. For how to gather ID information from customers, see "Use Prompt to ask for customer ID" on page 10-8.)

Table 12-1. Customer Priority Fields and Descriptions

Field	Description
Country Code	From the drop-down menu, select the country code of the customer’s telephone number.
Phone	From the drop-down menu, type the customer’s telephone number.
Standard, Bronze, Silver, Gold, Platinum	Click to choose the priority for this customer. CCA routes callers to agents based on this priority. If a customer does not have a priority, CCA assign the customer the default **Standard** priority.

3. Click **Apply**.
4. Repeat steps 2 and 3 to assign all customers a priority level.
5. Click **OK**.

To enable customer priority for a project

After creating Customer Priorities, edit each project that uses those priorities:

1. Click **Options** > **Projects** > **Phone** tab > **Options** subtab > and click the **Enable Customer Priority Rating** check box.
2. For more information, see “Enable Customer Priority Rating” on page 10-12.

Identifying Customers for Prioritization

To prioritize a phone customer, CCA must be able to match the caller's Customer ID or phone number. Table 12-2 provides CCA identifiers and explains how CCA uses them.

Table 12-2. Identifying Customers for Prioritization

Identifier	Method For Obtain Identifier
Customer ID	You must configure CCA to ask a customer to identify themselves by entering their ID number. For how to configure CCA to ask for an ID number from telephone customers, see "Use Prompt to ask for customer ID" on page 10-8.
Phone Number	If no Customer ID number is available, CCA tries to identify the customer using their phone number. CCA can automatically detect the caller's phone number as long as the caller did not block it. If CCA cannot detect the caller's phone number, you must ask the customer to identify themselves by entering their phone number. For how to configure CCA to ask a customer to enter their phone number, see "Validate phone number" on page 10-7.

For how to configure a Phone Project to gather the information necessary to identify customers for prioritization, see "Adding Phone Interactions to a Project" on page 10-5.

Customer priority levels take precedence over project priority levels. If Customer prioritization is enabled (meaning you checked the **Use Prompt to ask for customer ID** box discussed on page 10-8), CCA always prioritizes the interaction based on a customer priority level, disregarding a project priority level (see "Priority" on page 10-7).

Managing Mail Interactions (Email and Voicemail)

CCA works with electronic mail interactions by factoring two things:

- The number of electronic mail interactions an agent is configured to receive.
- Whether the electronic mail interaction is in the active interaction window in the Interaction Manager.

Normally, the email distributor sends mail interactions to a specific project, which then routes them to a workgroup. However, unlike a voice call or a chat, an Email Interaction does not take up an interaction license until the Agent accepts the email and moves it to the active interaction window.

If you configure the agent to handle multiple interactions at one time, then the agent could receive three or more interactions. If, for example, the agent accepts all three interactions, then three interaction licenses are tied up until the agent either disconnects or sends the emails back. (This is not an ideal practice.)

Since the Email Distributor sends an email to the Agent's Inbox with an Interaction ID, it is best to configure the Agent to accept only one interaction:

> When the interaction is delivered to the Agent, if the Agent accepts the interaction and responds to it immediately, then the license is released.

If the Agent needs time to respond to the email, then the agent can disconnect it (to release the license) and when the mess “Discard Email” appears, simply do not select “yes.” The Agent can then respond from their email client, which forwards back through the Email Distributor, which closes interaction tracking.

As long as the Agent responds before the configured time for a response, then the email is not forwarded to another Agent.

If the email is forwarded to another Agent, and the other agent responds prior to the original Agent, then the Email Distributor intercepts the second message and deletes it.

Troubleshooting Emails

Use AM to troubleshoot your call center’s email system by listing details for failed email messages and by correcting and re-sending the messages.

For example, if an agent attempts to send an email to a customer, but enters an invalid email address, use the Mail Manager screen to identify the problem, correct the error, and re-send the email.

In addition to standard email messages, Mail Manager reports any failed communications that move through the call center using the email system (voicemails, faxes, and so on).

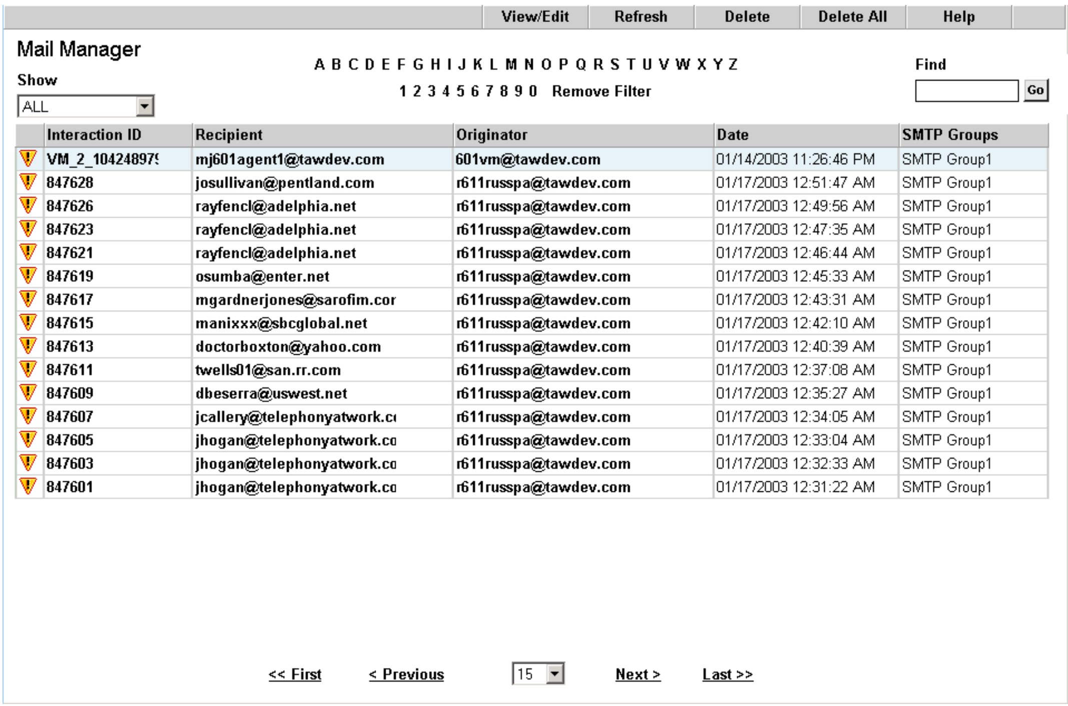
Viewing Mail Interactions

Use AM to view the following types of mail interactions:

- All emails and voicemails
- Emails and voicemails with errors
- Corrected emails and voicemails now pending (waiting to be sent)
- Corrected and sent emails and voicemails

To view mail interactions

1. Click **Options** > **Mail Manager**. A list of mail interactions (Figure 13-1) appears.



View/Edit | Refresh | Delete | Delete All | Help

Mail Manager

Show: ALL

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 2 3 4 5 6 7 8 9 0 Remove Filter

Find: Go

Interaction ID	Recipient	Originator	Date	SMTP Groups
VM_2_10424897	mj601agent1@tawdev.com	601vm@tawdev.com	01/14/2003 11:26:46 PM	SMTP Group1
847628	josullivan@pentland.com	r611russpa@tawdev.com	01/17/2003 12:51:47 AM	SMTP Group1
847626	rayfencl@adelphia.net	r611russpa@tawdev.com	01/17/2003 12:49:56 AM	SMTP Group1
847623	rayfencl@adelphia.net	r611russpa@tawdev.com	01/17/2003 12:47:35 AM	SMTP Group1
847621	rayfencl@adelphia.net	r611russpa@tawdev.com	01/17/2003 12:46:44 AM	SMTP Group1
847619	osumba@enter.net	r611russpa@tawdev.com	01/17/2003 12:45:33 AM	SMTP Group1
847617	mgardnerjones@sarofim.cor	r611russpa@tawdev.com	01/17/2003 12:43:31 AM	SMTP Group1
847615	manixxx@sbcglobal.net	r611russpa@tawdev.com	01/17/2003 12:42:10 AM	SMTP Group1
847613	doctorboxton@yahoo.com	r611russpa@tawdev.com	01/17/2003 12:40:39 AM	SMTP Group1
847611	twells01@san.rr.com	r611russpa@tawdev.com	01/17/2003 12:37:08 AM	SMTP Group1
847609	dbeserra@uswest.net	r611russpa@tawdev.com	01/17/2003 12:35:27 AM	SMTP Group1
847607	jcallery@telephonyatwork.c	r611russpa@tawdev.com	01/17/2003 12:34:05 AM	SMTP Group1
847605	jhogan@telephonyatwork.co	r611russpa@tawdev.com	01/17/2003 12:33:04 AM	SMTP Group1
847603	jhogan@telephonyatwork.co	r611russpa@tawdev.com	01/17/2003 12:32:33 AM	SMTP Group1
847601	jhogan@telephonyatwork.co	r611russpa@tawdev.com	01/17/2003 12:31:22 AM	SMTP Group1

<< First   < Previous   15   Next >   Last >>

Figure 13-1 Mail Manager: Show All Emails

2. The default is to view ALL mail interactions.

CCA limits you to retrieve a maximum of 500 mail interactions.

You can select one of the filter methods from the drop-down menu, to view only selected mail messages:

a. From the Show drop-down menu, select one of the following:

   i. **Mail Pending** shows corrected mail interactions that are waiting to be sent by an SMTP Server.

   ii. **Mail with Errors** shows mail interactions that never reached their destination.

   iii. **Mail already sent** shows corrected mail interactions that were sent to customers.

b. To search for mail interactions:

   i. Click on a letter or number at the top of the screen.

   ii. Click the **Remove Filter** button to go back to the list of all mail interactions.

   iii. Enter a string in the **Find** box.

   iv. Click the **Go** button.

   When using the Find text box (or when clicking on a letter or number at the top of the screen), AM searches on the currently selected column. For example, if you click the **Recipient** column and then click the letter **A**, CCA only shows mail interactions where the recipient address begins with the letter "A."

   The same is true when typing a string in the **Find** text box. If you click the **Originator** column and then enter **Steve** in the Find text box, CCA only shows mail interactions where the originator address begins with the string "steve."

The Find text box is **not** case sensitive.

The Find text box also supports the percent (%) character as a wildcard. For example, enter:

%@yahoo.com

to find all mail interactions from a single domain. Use the wildcard character anywhere in your search string.

Use the information in Table 13-1 to understand the report.

Table 13-1. Mail Manager Report Columns and Descriptions

Column	Description
Interaction ID	The system-assigned identification number for the interaction.
Recipient	The mail address of the intended mail message recipient.
Originator	The mail address of the sender of the mail.
Date	The date the mail was sent.
SMTP Group	The SMTP Group used (or to be used) to send the mail.

3. To sort the list based on the contents of a column, click the column header.

4. Click **Refresh** to update the list with current information.

5. Click the mail interaction to view and then click **View/Edit**. The Edit Mail screen (Figure 13-2) appears.

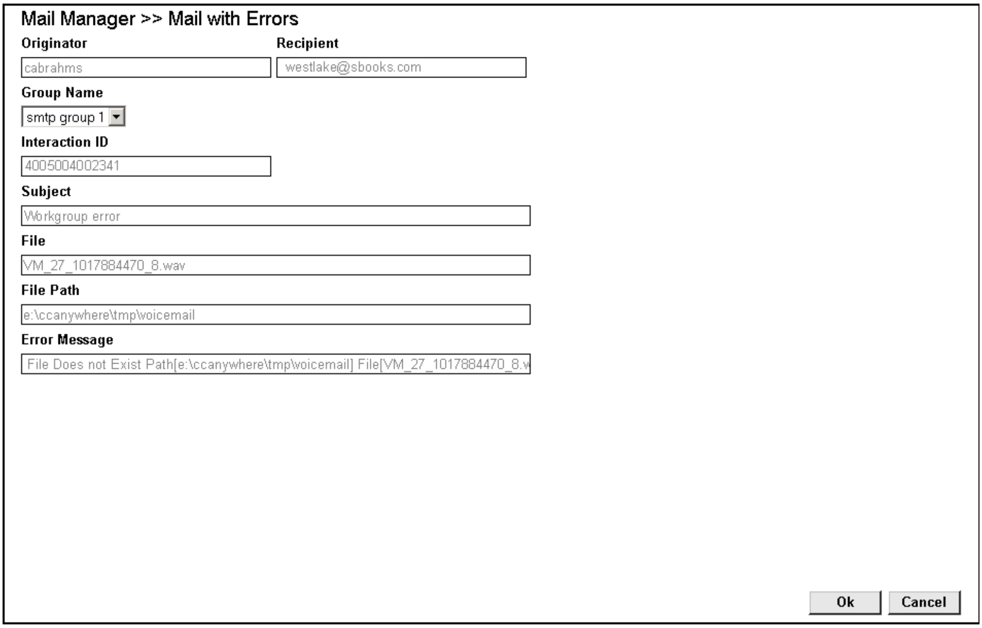


Figure 13-2 Edit Mail Manager

6. Use the information in Table 13-2 to understand the attributes of the mail.

Table 13-2. Mail Attributes and Descriptions

Attribute	Description
Originator	The mail address of the person who sent the mail.
Recipient	The mail address of the intended recipient.
Group Name	The SMTP Group used (or to be used) to send the mail.
Interaction ID	The system-assigned identification number for the interaction.
Subject	The subject line of the mail message.
File	Name of the text file into which the mail was converted for handling by CCA.
File Path	Location in which the mail file is stored for processing.
Error Message	If an error was encountered, this text describes the error.

7. Click **Ok**.

Correcting Emails

If an email did not reach its intended recipient (due to agent error, server problems, or any other reason), you can correct the problem and re-send the message.

If an email error occurred because the agent's email address was incorrect, you must correct the agent's email address **first** (Options > Agents > Email tab > Agent Email Address), then follow the steps below to fix the email messages.

To correct an email error

1. Display all email with errors (see "Viewing Mail Interactions" on page 13-3).

2. Click the email to correct.

3. Click **View/Edit**. The Edit Email screen (Figure 13-3) appears.

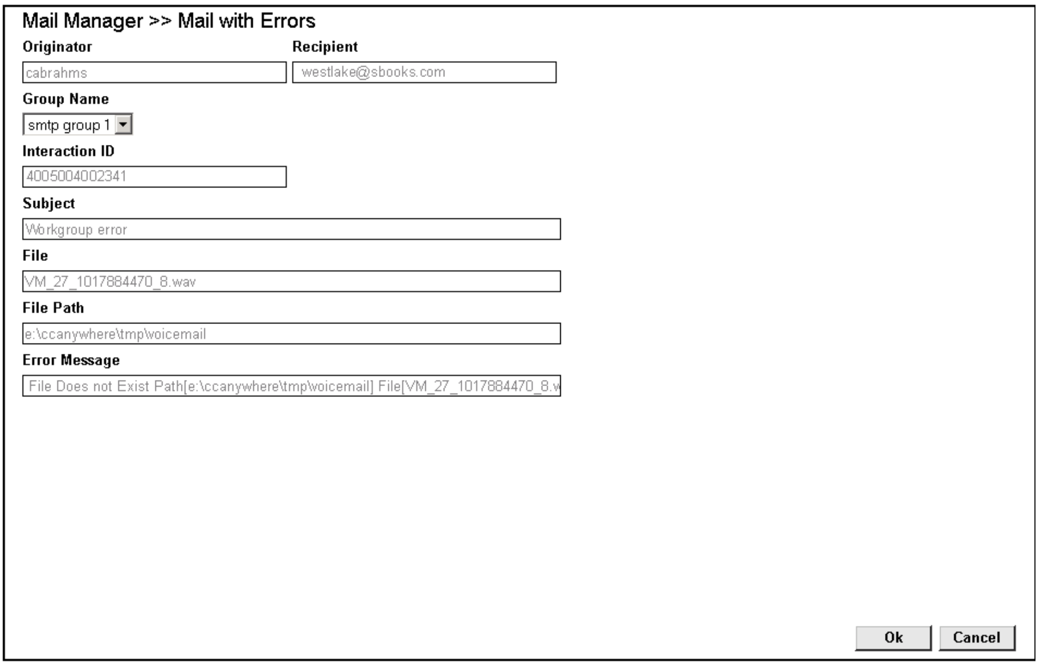


Figure 13-3 Correcting an Email

4. Correct any errors in the email **Recipient** or **Group Name** attributes.

5. Click **Ok**.

   CCA moves the email into the **Mail Pending** group and queues the message for re-sending.

Deleting Mail Interactions

You can delete failed mail interactions from the **Mail with Errors** group and from the **Mail Already Sent** group.

To delete mail interactions

1. Choose the email group containing the mail interactions to delete.

2. Click the mail to delete.

3. Click **Delete** to delete the selected mail (or click **Delete All** to delete all the mail interactions in the list). A confirmation message (Figure 13-4) appears.

Figure 13-4 Delete All Confirmation Message

4. Click a selection and then click **OK**.

14

Call Blocking

Use Call Blocking to prevent agents and the CCA automated callback features from calling specific phone numbers. Block numbers that any outbound phone interaction could use, including:

- Outbound calls placed by agents
- Calls to an agent’s follow-me (forwarding) number
- Calls transferred by an agent
- Web callbacks
- ACD callbacks
- Predictive calls
- Preview calls

When an agent tries to call to a blocked number, IM displays an error message indicating that the number is blocked.

If a customer requests a callback (through either your Website or your workgroup callback menu) to a blocked country code or number, CCA plays a prompt for the customer indicating that their request cannot be processed.

Call blocking lists created by a Network Administrator can only be deleted by a Network Administrator.

Creating a Call Blocking List

Identify the numbers to block so that campaigns and agents cannot use them when making outbound phone interactions.

To create a call blocking list

1. Click **Options** > **Call Blocking**. CCA displays the list of previously defined Call Blocking Patterns (Figure 14-1) if any exist.

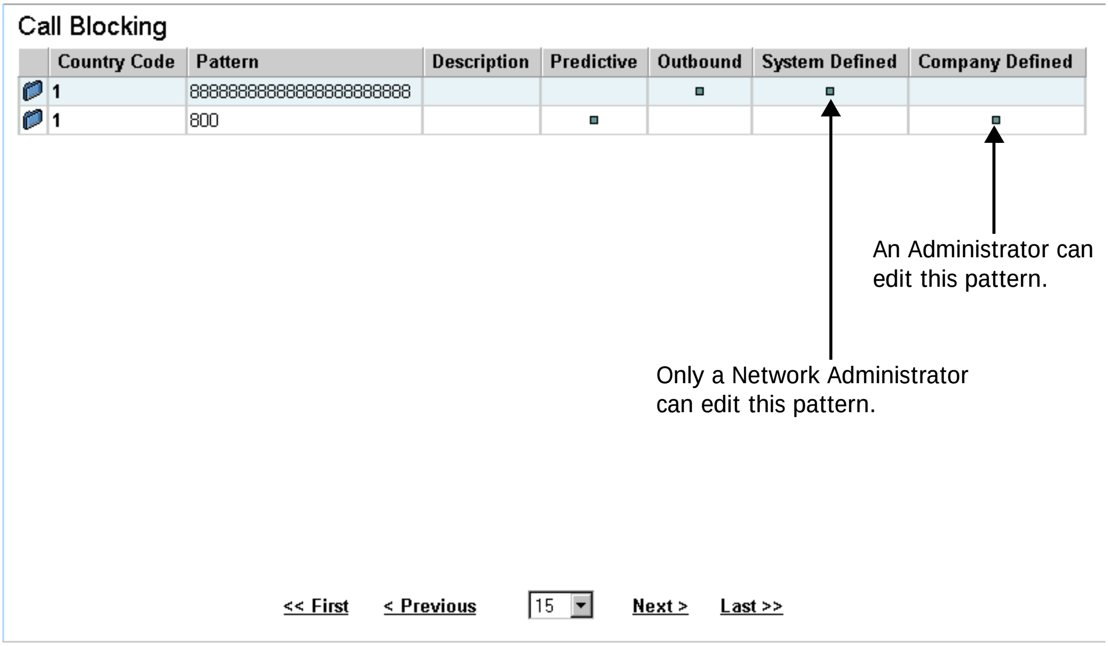


Figure 14-1 Call Blocking Pattern List

   a. The **System Defined** column: If a bullet appears, then a Network Administrator added or modified the pattern. (Only a Net Admin can edit this pattern.)

   b. The **Company Defined** column: If a bullet appears, then a System Administrator or an Administrator added the pattern. (Therefore, an Admin can edit this pattern.)

2. Click **Add**. The Add Call Blocking screen (Figure 14-2) appears.

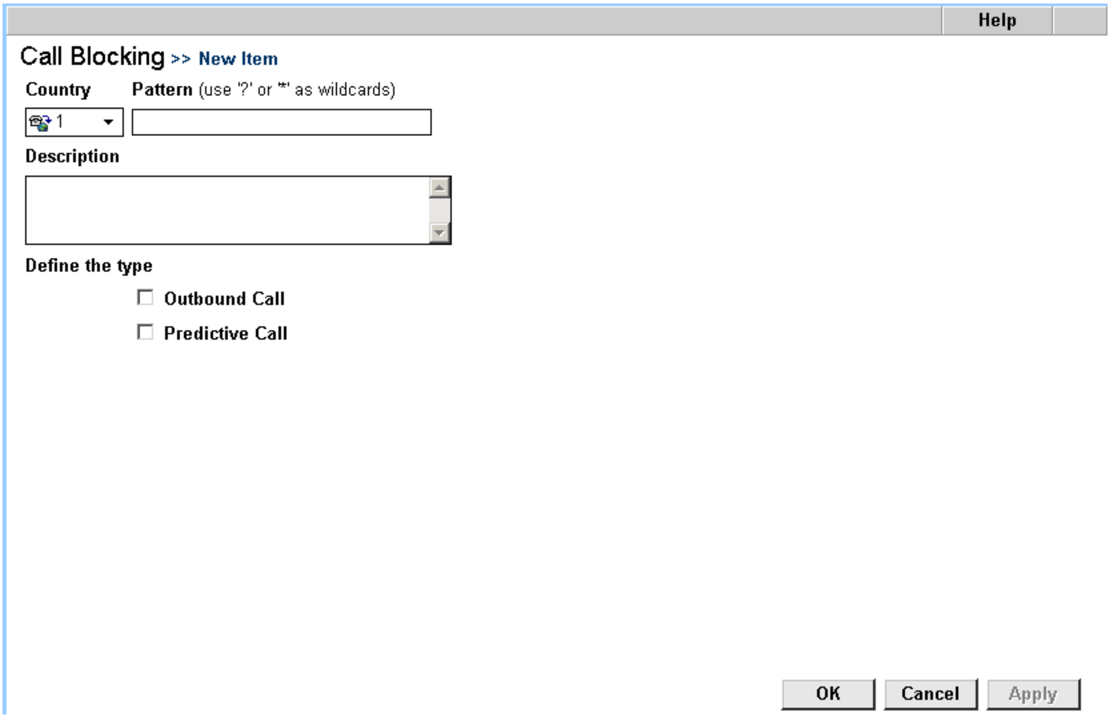


Figure 14-2 Call Blocking Screen

3. Using the information in Table 14-1, complete the fields.

Table 14-1. Call Blocking Fields and Descriptions

Field	Description
Country	From the drop-down menu, select a country code to block. CCA blocks all call attempts to the numbers specified in the **Phone** text box (next field) in this country code.
Pattern	Type a phone number or pattern to block. For example, to block all calls to the number 858-410-1600, simply type the number, as shown. This blocks ***only*** calls placed to this specific number.

Table 14-1. Call Blocking Fields and Descriptions

Field	Description
	Use the asterisk (*****) wildcard character to block all digits in zero or more positions of the number. For example, enter **9*** to block all numbers with an area code beginning with 9, including 900-123-4567, 988-765-4321, 999-123-4567, and so on. This pattern does not block, for example, calls to 888-854-4224 or any other number that does not have an area code beginning with 9. Use the question mark (**?**) wildcard character to block all digits in a single position of the number. For example, enter 90?-123-4567 to block the phone number 123-4567 in all area codes beginning with 90 (including 901, 902, 903, up to 909). This pattern does not block, for example, the number 910-123-4567 or any other number that does not have an area code beginning with 90.
Description	Type a description for this call blocking list. This information appears in the **Description** column of the Call Blocking list.
Outbound Call	Check to prevent agents (or the CCA automated callback system) from placing calls to numbers matching the specified pattern. Clear this check box to allow outbound calls to numbers matching the pattern. (This also applies to preview calls.)
Predictive Call	Check to prevent CCA from placing predictive calls to numbers matching the specified pattern. Clear this check box to allow predictive calls to numbers matching the pattern.

4. Click **Apply**.
5. Repeat steps 2 through 4 for all the patterns to block.
6. Click **OK**.

15

Introduction to Standard and Custom Reports

Create tabular and graphical reports to help understand the trends, activities, and agent performance in your call center. Create reports showing:

- Agent activity, performance, and efficiency
- Interaction statistics
- Interaction outcomes
- Project billing and cost details
- Outcome of predictive calls
- Traffic information

CCA reports are customizable, so you can:

- Display as much or as little data as needed.
- Specify a report date range.
- Display data in the graphical format that makes the most sense to you.
- Control which Administrators and Supervisors can access reports.
- Specify the date format, time zone, and language for the report.

Overview of Standard Reports

Table 15-1 shows the reports AM provides. For how to generate a specific standard report, see the individual report chapters.

Table 15-1. Administration Manager Standard Reports

Report	Description
Weekly Project Routing Schedule	Lists all schedules defined for the call center.
Workgroup Skills	Displays the skills assigned to a workgroup and the rating of those skills.
Billing	Summarizes the number and duration of interactions in each call center for which you provide service.
Workgroup Key Statistics	Shows statistics to help understand the overall performance of the call center.
Workgroup Interval Time	Shows how agents are performing at specific times of the day.
Workgroup Interval Time by Media	Shows how many interactions of each media type the call center receives at specific times of the day.
Outcome Statistics	Allows tracking interaction results based on interaction type (ACD call, Web callback, and so on).
Overdue Callbacks	Lists all waiting Web call-back interactions.
Predictive Dialer Totals	Shows a group of call-related statistics (number of calls, answer rate, and so on) for predictive dialing.
Predictive Productivity	Displays a breakdown of the production statistics based on the agents used for any or all predictive call attempts. **Note:** Predictive reports are available only if you purchased Predictive Dialing capabilities with your version of CCA.
Predictive Summary	Displays a breakdown of the actions (left message, callback, and so on) of all predictive call attempts. **Note:** Predictive Reports are available only if you purchased Predictive Dialing capabilities with your version of CCA.

Table 15-1. Administration Manager Standard Reports

Report	Description
Predictive Detailed	Displays a breakdown of the results (busy, no answer, and so on) of all predictive call attempts. **Note:** Predictive reports are available only if you purchased Predictive Dialing capabilities with your version of CCA.
Preview Summary	Displays a breakdown of the preview results based on the agents used for any or all predictive call attempts. **Note:** Preview reports are available only if you purchased Preview Dialing capabilities with your version of CCA.
Agent Information	Displays agent profile information (extension, email address, and so on).
Agent Interaction	Displays details about the number and duration of selected interaction types for selected agents.
Agent Skills	This report quickly shows which agents possess each skill in the call center by showing all the skills defined for your Company, identifying which agents possess each skill, and providing the agent's skill rating.
Agent Utilization	Shows the time each agent spent handling interactions, awaiting interactions, or on break, which is good for evaluating agent use.
Direct Dialing Statistics	Shows statistics for calls dialed directly to agents or dialed by agents to external numbers.
Login by Groups of Users	Displays the agents who logged in, their login time, and login duration.
Login by User	Provides information about the login activity of each agent.
Project Key Statistics	Shows a set of interaction statistics, by interaction type (phone, email, and so on) and as a summary across all interaction types.

Overview of Custom/Advanced Reports

The CCA Advanced Report Templates allow you to configure highly detailed reports that provide information not available in the Standard Reports.

In addition, CCA presents Advanced Report information differently than Standard Reports, which presents information in an “all or one” format. You can set Advanced Reports to run in ways that compare multiple projects/workgroups/users and so on.

Table 15-2 shows the Advanced Report templates available from **Custom Reports** > **Advanced Reports**.

Table 15-2. Administration Manager Custom/Advanced Reports

Advanced Report	Description
Daily Project Performance	This report provides a snapshot of Call Center Activity by Call Number and Type, Time Measurements of Call Center activity, along with Service Level performance against pre-set thresholds. You can configure this report to show all activity for all projects or for individual projects you select, by interval or by dates.
Interval Workgroup Performance	This report tracks Workgroup Activity in 15-minutes intervals or daily by a single day or range of dates. Statistics tracked include: Number, Type and Disposition of Calls Service Levels Collective time in ACD States Agent Login activity and visibility into ACD States.
User Login/Logout	This report tracks user login/logout activity and the duration and logout reason for a user-defined time range.
User Hourly Average	This report tracks Agent Activity related to the Average Number of Calls handled, Average Talk Time (ATT), Average Available Time, and Average Busy Time per hour.
Daily User Performance	This report tracks Agent performance relative to time spent in the different ACD States, Call Counts, and Talk Times.

Table 15-2. Administration Manager Custom/Advanced Reports

Advanced Report	Description
System Peak Interactions	This report tracks the Maximum peak number of Interactions used by the system, reported in 15-minute intervals.
System Peaks (15 mins)	This report tracks the number of peak interactions for a specified company or tenant, in 15-minute intervals.
Interaction Outcome by Workgroup	This report tracks outcomes by Workgroup, Interaction Type, Outcome, Total Interaction time, and Average Interaction Time.
Service Billing Report - By Project	The report shows transaction times and billing rates by project, for a specified date range.
User Status Duration	This report tracks Agent Activity through the daily use of User-Defined Agent Statuses. This provides more granularity in regards to the way that an Agent actually spends their time versus the standard ACD Statuses of Available, Busy, and On Break. This report tracks the following: User Date Status (Company Defined) Duration ACD Status (System Default) % of Total
Inbound Traffic Report	The report provides a count of the number of calls offered by area code and exchange within that area code.

These reports are produced in PDF format. You will need Adobe Acrobat Reader to view these reports. For more specific information about each of these Advanced Reports, refer to the *Advanced Reports User's Guide*.

Viewing and Printing Standard Reports

You can view and print reports you or another Administrator created and saved for your company.

CCA supervisors cannot create or edit report definitions.

To view or print Standard Reports

Expand the **Reports** links in the Navigation Pane, then expand one of the bold headings to see the reports under that heading.

1. Click a report name (for example, **Billing**). If no reports of that type exist, an empty Billing Report List (Figure 15-1) appears.

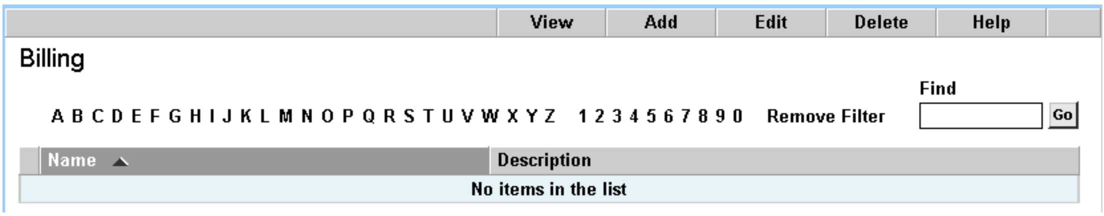


Figure 15-1 Example Empty Report List

If any reports of that type exist, a list of Billing Reports (Figure 15-2) appears.

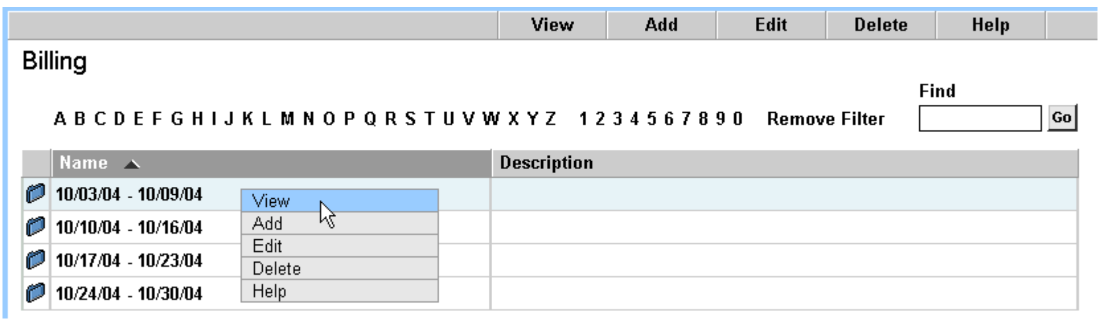


Figure 15-2 Pop-Up Menu

2. To view a report:

   i. Right-click a report name.

   ii. Choose **View** from the pop-up menu (Figure 15-2).

   Or, you can also click the **View** button from the top of the screen. The Report dialog box opens to the **Period Covered** tab (Figure 15-3).

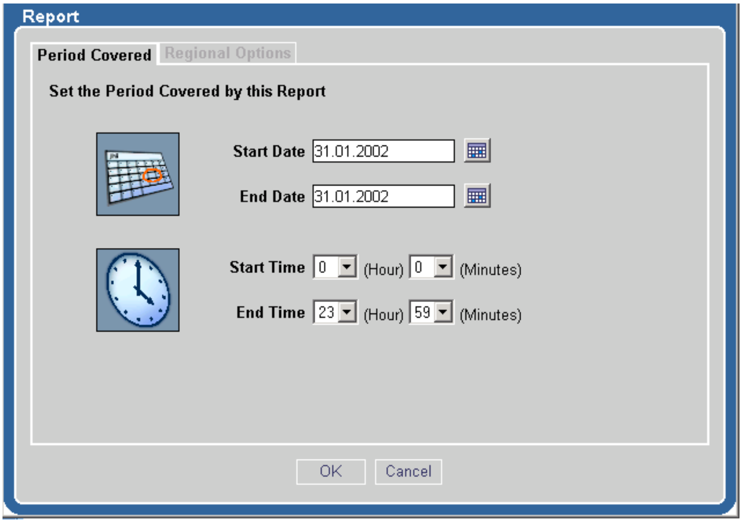


Figure 15-3 Report Dialog Box: Period Covered Tab

3. If available, use the **Period Covered** tab to set the date range for the report (Table 15-3).

Table 15-3. Period Covered Tab Fields and Descriptions

Field	Description
Start Date	Click [calendar button] to display a calendar for selecting the report range start date. Choose the report start date by clicking a day in the calendar, or click **today** to choose today's date (based on your workstation's system clock). Click **>** or **<** to advance or roll back the calendar one month, respectively.

Table 15-3. Period Covered Tab Fields and Descriptions

Field	Description
	Click **>>** or **<<** to advance or roll back the calendar one year, respectively.
End Date	Click  to display a calendar for selecting the report range end date. Choose the report end date by clicking a day in the calendar, or click **today** to choose today's date (based on your workstation's system clock). Click **>** or **<** to advance or roll back the calendar one month, respectively. Click **>>** or **<<** to advance or roll back the calendar one year, respectively.
Start Time	Choose the report range start hour (24-hour clock) and minute.
End Time	Choose the report range end hour (24-hour clock) and minute.

4. Click the **Regional Options** tab (Figure 15-4).

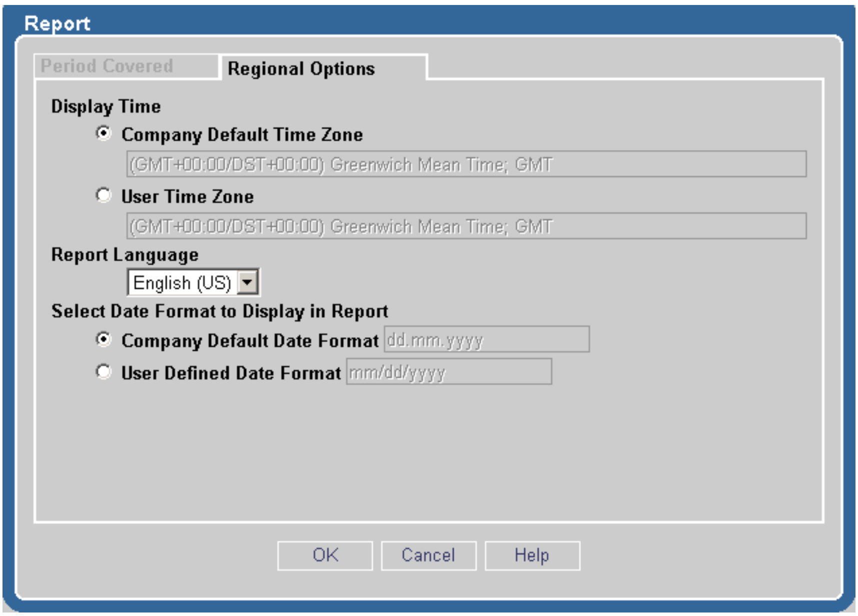


Figure 15-4 Regional Options Tab

5. Using the information in Table 15-4, complete fields.

Table 15-4. Regional Options Tab Fields and Descriptions

Field	Description
Display Time	Choose **Company Default Time Zone** to display all report times in your company's default time zone defined. Choose **User Time Zone** to display all report times in your AM workstation's configured time zone.
Report Language	From the drop-down menu, select the language to use in this report.
Select Date Format to Display in Report	Choose **Company Default Date Format** to display all report dates in your company's default format. Choose **User Defined Date Format** to display all report dates in your AM workstation's configured format.

6. Click **OK**.

   The report appears in a new browser window.

7. To print the report, use your browser's **Print** command (**File** > **Print**).

Viewing and Printing Custom/Advanced Reports

You can view and print Custom/Advanced Reports you or another Administrator created and saved for your company.

You must install Adobe Acrobat Reader on all workstations of users who want to view Advanced Reports as well as Scheduled Advanced Reports.
CCA delivers Scheduled Reports in both Web (html) format as well as in Acrobat (pdf) format.

To view or print Custom/Advanced Reports

1. Expand the **Custom Reports** link in the Navigation Pane.

2. Then, expand the **Advanced Reports** link to see the reports under that heading.

3. Follow the same steps described under “To view or print Standard Reports” on page 15-6.

A Note About Start and End Times

For almost every report, the start and end times work the same. For example, run a Billing report using the following:

Select:

- Start date = 07/01/04
- End date = 07/30/04
- Start time = 8:00 (AM)
- End time = 17:00 (5:00 pm)

The Bill Report includes events:

- Starting at 8:00 AM on 7/01/04
- Through 5:00 PM on 07/30/04

Any event occurring between those times, *twenty-four hours a day, seven days a week*, is included in the report. Every CCA report works this way -- with two exceptions:

- The Workgroup Interval Time report
- The Workgroup Interval Time by Media report

If you run these reports (and select the same start and end times as above) the report would contain events occurring between 8:00 AM and 5:00 PM, *every day* between 07/01/04 and 07/30/04.

Note About Project Routing and Reporting

If CCA receives a call into Project A and this changes another project (such as Project B), the report will show the change to Project A. This is because the change actually came into Project A and if CCA reported it for both Project A and Project B, then the information would be doubled. If CCA reported the change for only Project B, then there would be no way to tack which project the call actually came into. This is important for some clients who use multiple project DNISs that reroute to the same project or menu for tracking which advertising source is generating the most calls.

Scheduling Reports

Use the **View** button to manually generate a report whenever you want (see page 15-6). In addition, you can schedule reports to run automatically, cover selected periods of time, and be automatically mailed to one or more email addresses.

CCA generates all scheduled reports at midnight (according to the company itemizing).

Before using the scheduling feature the first time, you must make some minor edits to the report.xml file. See "Configuring the report.xml File" below.

Configuring the report.xml File

The **first time** you use the report scheduling feature, you must make some minor edits to the report.xml file.

1. After installing the current build, find the report.xml file at:

   TAW/custom/report.xml

2. Open the file in a text editing program and verify that the following tags have correct values. The examples below show the default directory paths, but you should verify that these are correct for your site.

   The "url" parameter should contain the URL path of your TAW web server:

```
<parameter
        name="url"
        value="http://<machine name>/TAW"
/>
```

   The "urlReportCss" parameter should contain the URL path to the web_clients.css file:

```
<parameter
        name="urlReportCss"

        value="http://<machine_name>/TAW/css/web_clients.css
        "
/>
```

   The "urlReport" parameter should contain the URL path to the report directory:

```
<parameter
        name="urlReport"
        value="http://<machine_name>/TAW/AdministrationMana
        ger/report"
/>
```

After editing the report.xml file, you must **restart** the TAW Web server.

To schedule a report

1. Select a report type. For example: Click **Reports** > **Call Center Operations** > **Workgroup Skills**

2. Click the **Add** button (to create a new report) or the **Edit** button (to create a schedule for an existing report).

3. When the report opens, click the **Schedule Report** tab.

4. Then, select the **Enable Report Scheduling** check box (Figure 15-5).

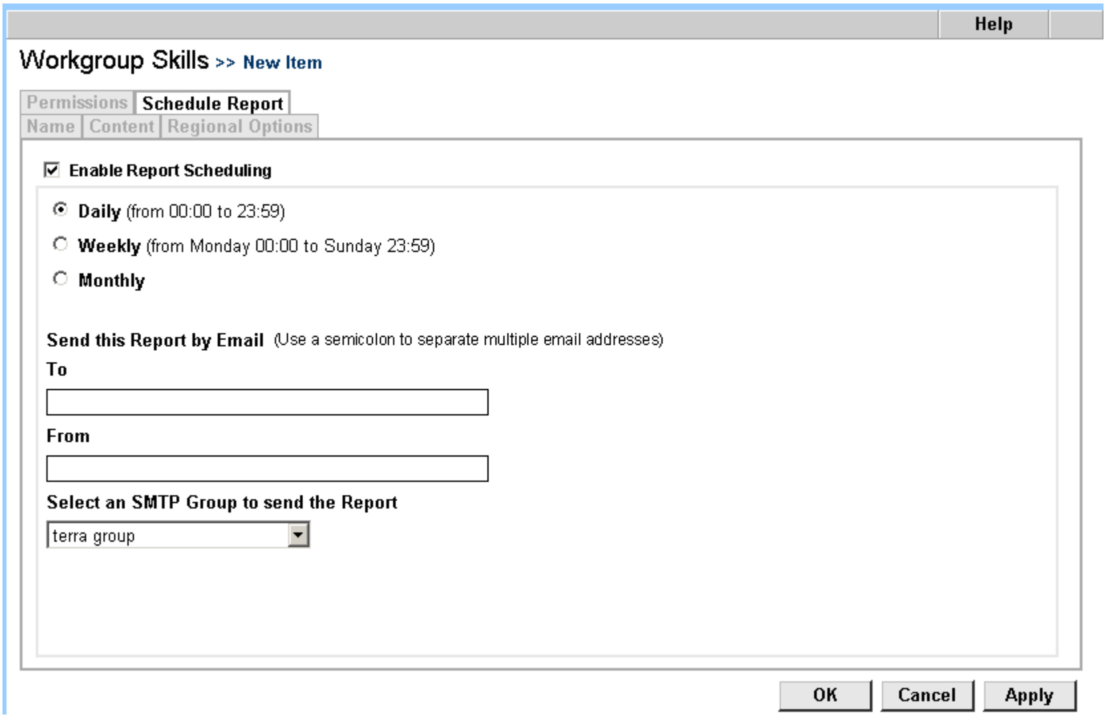


Figure 15-5 Schedule a Report

5. Select a reporting period:

    - Daily
    - Weekly
    - Monthly

6. Complete the fields under **Send this Report by Email**.

    a. In the **To** text box, enter one or more email addresses where CCA sends the report. Separate multiple email addresses with a semi-colon (**;**). For example:

    brice@indy500.com;gdefarran@indy500.com

The **To** field uses a maximum of 2048 characters.

---

b. In the **From** text box, enter one email address. (The person who receives the report can see this address in the email's From field.)

The **From** field uses a maximum of 128 characters.

---

7. Select an SMTP group.

To delete a report

The following steps show how to delete a Workgroup Segments report, but you can delete all reports the same way.

1. Click the **Reports** link to expand it.

2. Then, click on a report group name (such as **Workgroup Productivity**) to see the reports in that group (Figure 15-6).

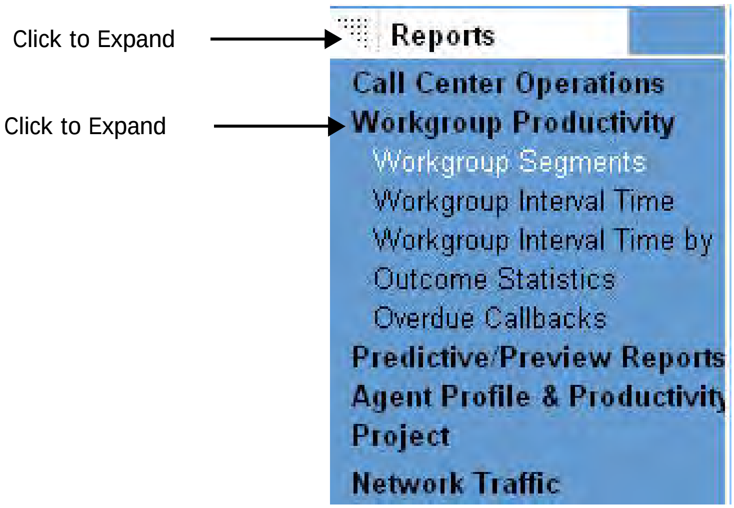


Figure 15-6 Reports Links

3. Click on a report name (such as **Workgroup Segments**).

   A list of reports of that type appears (Figure 15-7).

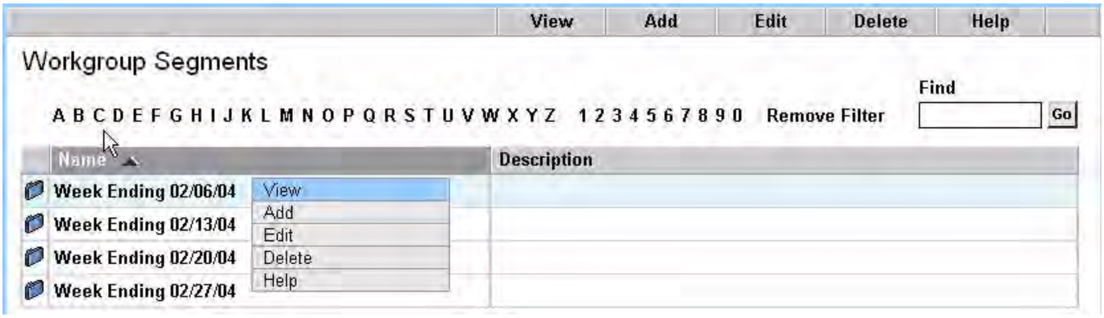


Figure 15-7 Workgroup Segments

4. Right-click on the report to delete and select **Delete** from the pop-up menu (Figure 15-7).

   or

   Select a report and then click the **Delete** button.

   A delete confirmation message (Figure 15-8) appears.

Figure 15-8 Delete Confirmation Message

5. Click **OK** confirm the deletion.

Deleted Objects and Historical Reports

Deleting an object (such as companies, Workgroups, Agents, Projects, Data Sources, and so on) from AM does NOT remove the object from the CCA database.

> For example, if you delete a workgroup in AM, the workgroup is still in the database. CCA marks the workgroup as “do not display this workgroup in any CCA GUI.”

Because objects remain in the database forever, they can be picked up by reports containing historical data.

> This means, if you delete a workgroup on January 15th and then run a report showing workgroup activity going back to January 1st, the report will show activity from the deleted workgroup.

The Call Center Operations Reports

The available Call Center Operations Reports include:

- Weekly Project Routing Schedules Report
- Workgroup Skills Report
- Billing Report (for CCA's Service Providers Edition only)

Weekly Project Routing Schedules Report

The ***Weekly Project Routing Schedules Report*** lists all of the Schedules defined for your call center.

Weekly Project Routing Schedules >> Weekly Project Routing

Report Includes Schedules: Monday Routing, Tuesday Routing, Wednesday Routing, Thursday Routing, Friday Routing, Saturday Routing, Sunday Routing,

DNIS	Day	Start Time	From Project	To Project	Time Zone
8584100448	Monday	00:00:00	John-2nd	John-Main	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100449	Tuesday	00:00:00	John-2nd	John-Main	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100450	Wednesday	00:00:00	John-2nd	John-Main	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100451	Thursday	00:00:00	John-2nd	John-Main	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100452	Friday	00:00:00	John-2nd	John-Main	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100453	Saturday	00:08:00	John-2nd	John-Schedule	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100454	Sunday	00:08:00	John-2nd	John-Schedule	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100455	Monday	00:08:00	John-Main	John-2nd	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100456	Tuesday	00:08:00	John-Main	John-2nd	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100457	Wednesday	00:08:00	John-Main	John-2nd	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100458	Thursday	00:08:00	John-Main	John-2nd	(GMT-08:00/DST+00:00) Pacific Standard Time; PST
8584100459	Friday	00:08:00	John-Main	John-2nd	(GMT-08:00/DST+00:00) Pacific Standard Time; PST

Generated on 17.12.2002 at 18:51 (GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 16-1 Sample Weekly Project Routing Schedules Report

Report Elements

The ***Weekly Project Routing Schedules Report*** shows the information provided in Table 16-1 for each schedule:

Table 16-1. Project Schedules Report Columns

Column	Description
DNIS	The telephone number or email address customers use to reach the Scheduled Project.
Day	The day the project begins (based on the number or address indicated by **DNIS**).
Start Time	The time (24-hour clock) the project starts (on the indicated **Day** the project).

Table 16-1. Project Schedules Report Columns

Column	Description
From Project	The (previous) project, which the schedule will temporarily disable while the (current) **To Project** runs.
To Project	The project the schedule runs (at the specified **Day** and **Start Time**).
TIme Zone	The time zone used to generate the report. (The values in the **Start Time** column are for this time zone.)

To create a Weekly Project Routing Schedules Report

1. Click **Reports** > **Call Center Operations** > **Weekly Project Routing Schedules**. The Weekly Project Routing screen appears, listing any reports.

2. Click the **Add** button. The Name tab of the ***Weekly Project Routing Schedules Report*** screen (Figure 16-2) appears.

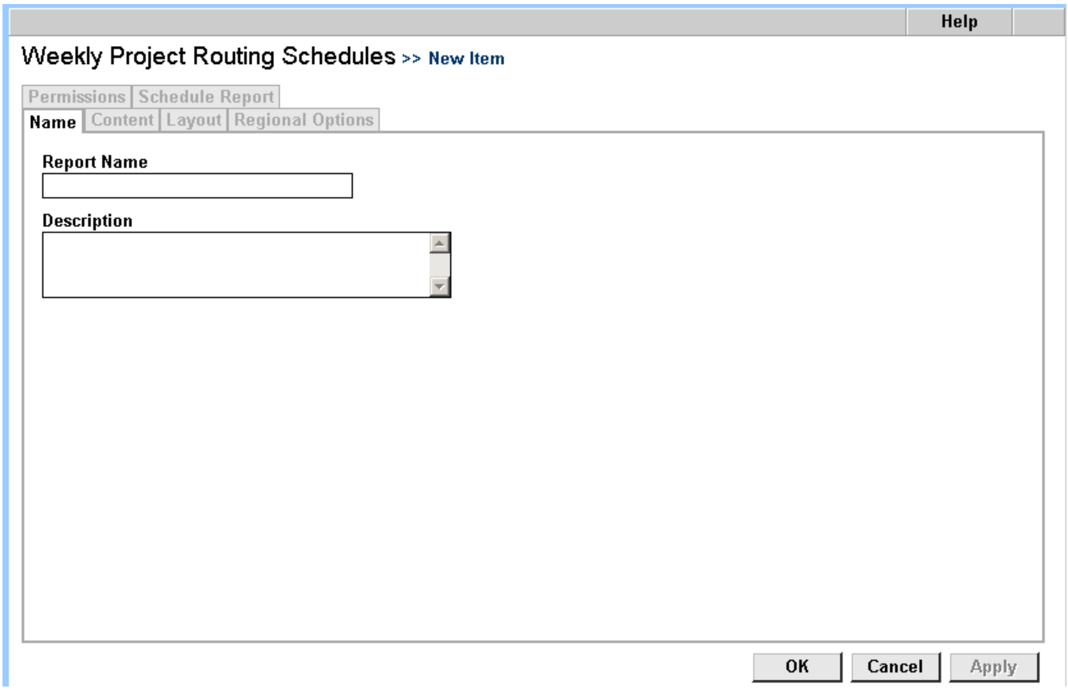


Figure 16-2 Name Tab

3. Using the information in Table 16-2, complete the **Name** tab for the Weekly Project Routing Schedules Report.

Table 16-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Weekly Project Routing Schedules Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). This description appears in the **Description** column of the list of Weekly Project Routing Schedules Report definitions.

4. Click the **Content** tab.

   The Content tab of the ***Weekly Project Routing Schedules Report*** screen (Figure 16-3) appears.

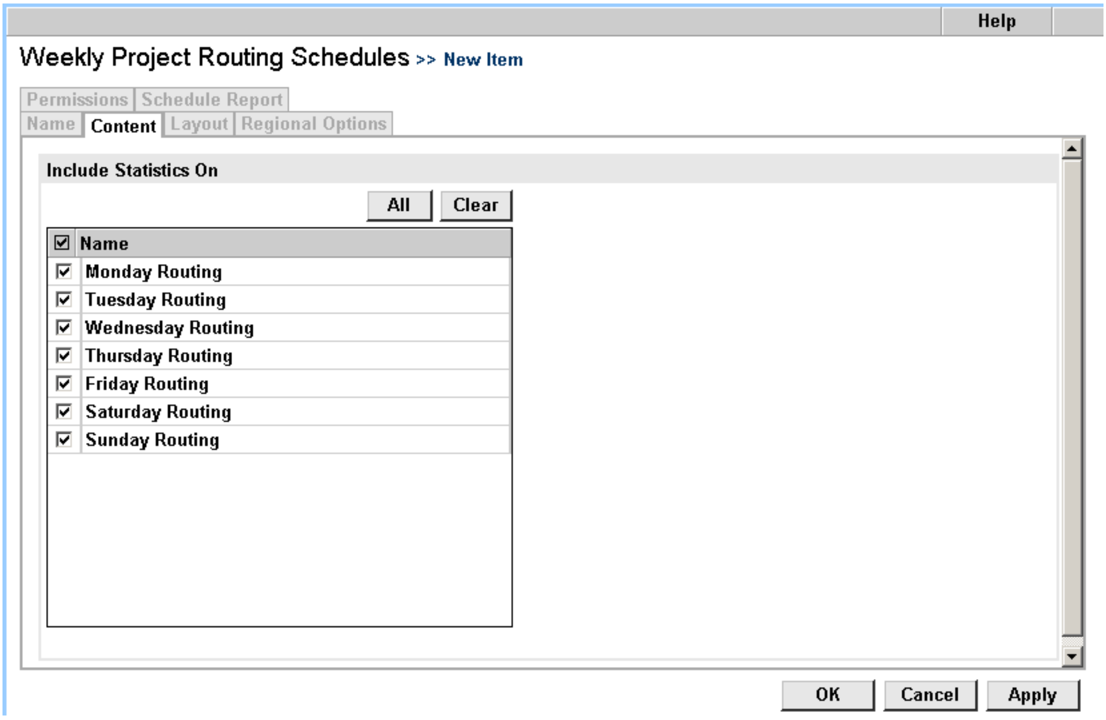


Figure 16-3 Content Tab

5. Using the information in Table 16-3, complete the fields.

Table 16-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	In the **Include Statistics On** area, check the days of the week to include in the report. Click **All** to include all days or click **Clear** to clear all the check boxes.

6. Click the **Layout** tab. The Layout tab of the ***Weekly Project Routing Schedules Repor***t screen (Figure 16-4) appears.

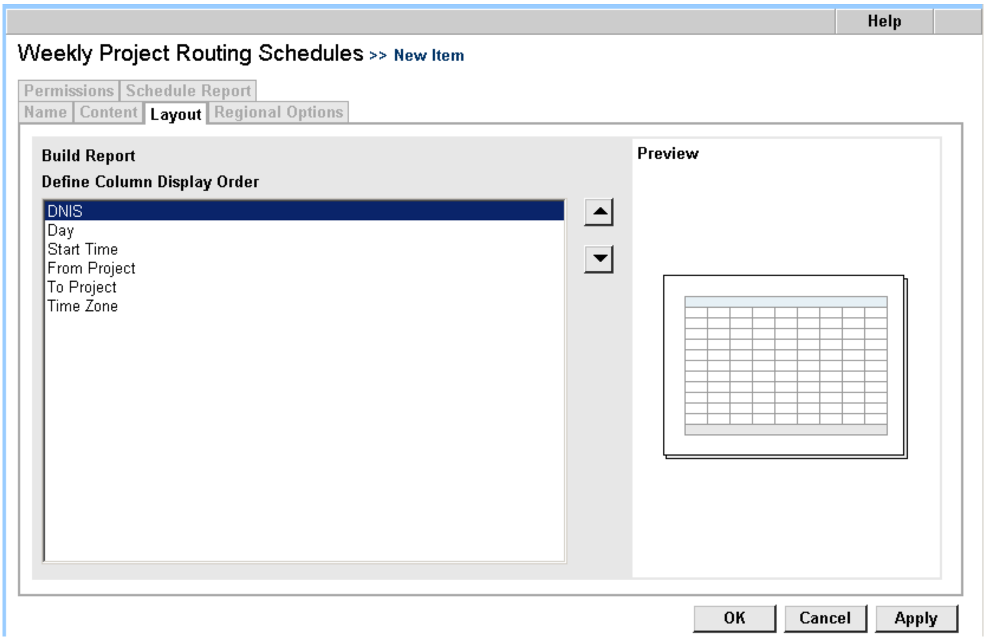


Figure 16-4 Layout Tab

7. Using the information in Table 16-4, complete the fields.

Table 16-4. Layout Tab Fields and Descriptions

Field	Description
Build Report	A list of report columns appears in this box. Arrange the order of these columns by clicking a column element and then clicking the up arrow (▲) to move it up or click the down arrow (▼) to move it down.

8. Click the **Regional Options** tab.

The Regional Options tab of the ***Weekly Project Routing Schedules Report*** screen (Figure 16-5) appears.

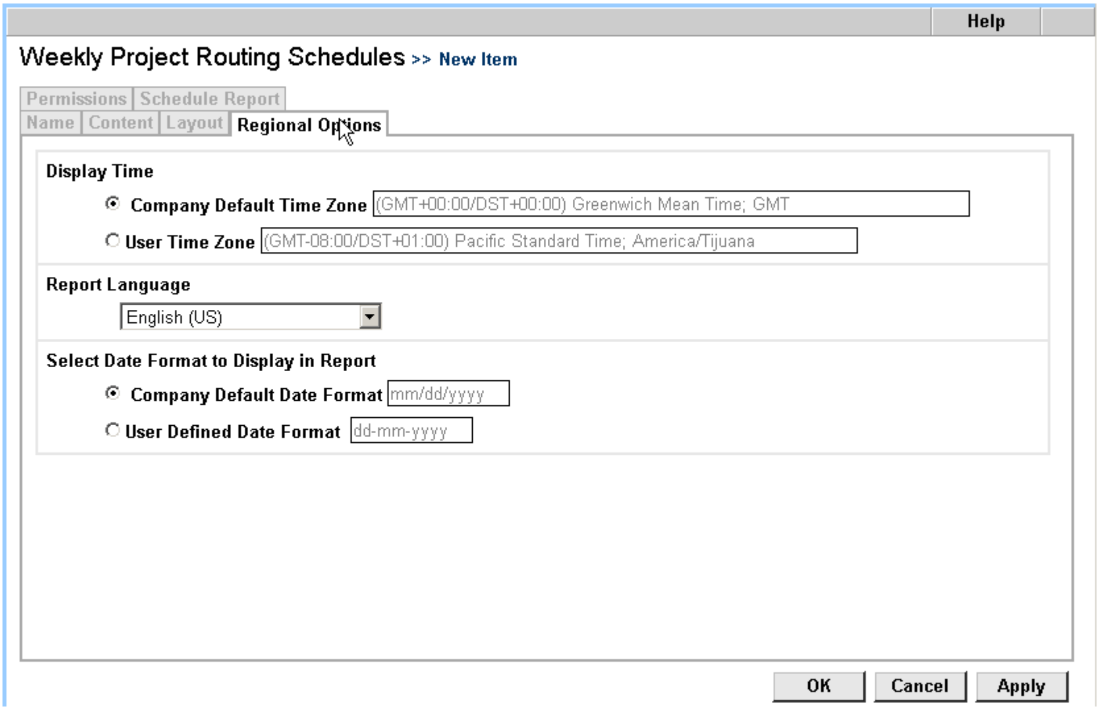


Figure 16-5 Regional Options Tab

9. Using the information in Table 16-5, complete the fields.

Table 16-5. Regional Options FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the specified time zone set for the company.
User Time Zone	All times using the specified time zone set for your workstation.
Report Language	All report contents in the language you choose.
Company Default Date Format	All dates using the format specified for the Company.

Table 16-5. Regional Options FIelds and Descriptions

Choose...	To Display...
User Defined Date Format	All dates using the format specified for your workstation.

10. Click the **Permissions** tab.

    The Permissions tab of the ***Weekly Project Routing Schedules Report*** screen (Figure 16-6) appears.

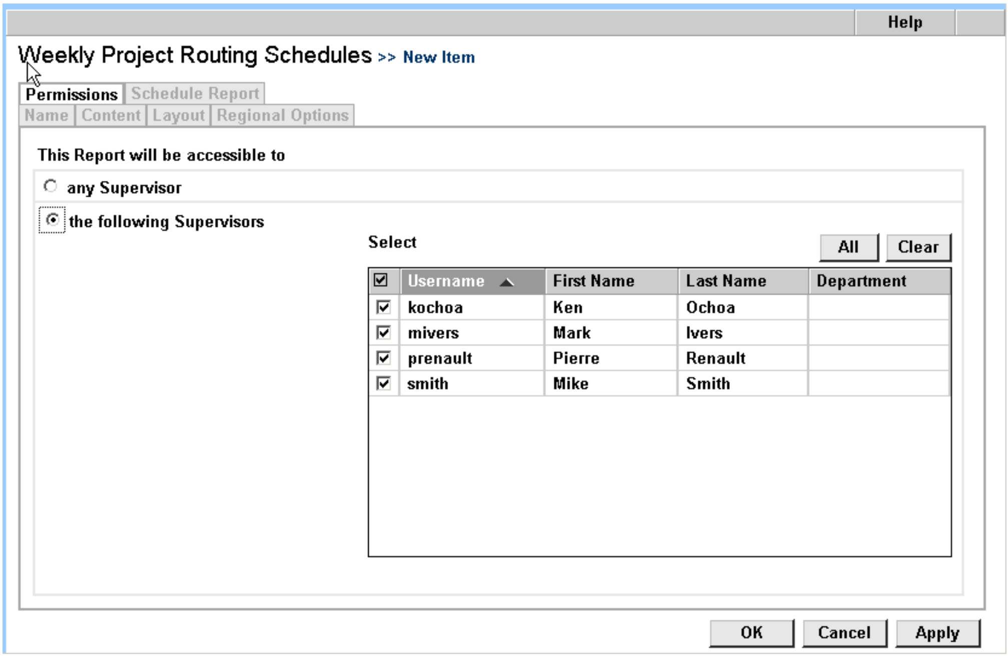


Figure 16-6 Permissions Tab

11. Click the check box next to a supervisor to give that supervisor permission to view and print the report. Supervisors not checked will not see the report in SM. (Click **All** to include the entire list or click **Clear** to clear all selections.)

12. Click **OK**.

CCA saves the report in the database. Any Administrator or Supervisor logged into your company and access the report. In addition, anyone to whom you have given permission, can also access the report.

- For how to view and print a report, see page 15-6.
- For how to delete a report, see page 15-14.

Workgroup Skills Report

The ***Workgroup Skills Report*** (Figure 16-7) displays the skills assigned to a workgroup and the rating of those skills.

Workgroup Skills >> San Diego Call Center West

Report Includes All Workgroups,

English Workgroup

Skill Name	Rating
Desktop - PC	25
Network Management	20
Speaks English	20
Desktop - UNIX	15
Desktop - Macintosh	10
Speaks Spanish	10

Spanish Workgroup

Skill Name	Rating
Speaks English	50
Desktop - Macintosh	25
Desktop - PC	25

Figure 16-7 Sample Workgroup Skills Report

Report Elements

CCA Supervisors viewing the ***Workgroup Skills Report*** should know that this report reflects activity for the entire company. Data presented includes all agents, not just the agents for a specific supervisor.

Table 16-6 shows the elements of the ***Workgroup Skills Report***.

Table 16-6. Workgroup Skills Report Fields and Descriptions

Item	Description
Skill Name	Displays the Skill Name you entered when you created the skill (Options > Skills).
Rating	Displays the Skill Level Weight you assigned to this skill when you created the Workgroup (Options > Workgroups > Skills).

To creating a Workgroup Skills Report

1. Click **Reports** > **Call Center Operations** > **Workgroup Skills**. The Workgroup Skills screen opens.

2. Click the **Add** button. The Name tab of the ***Workgroup Skills Report*** screen (Figure 16-8) appears.

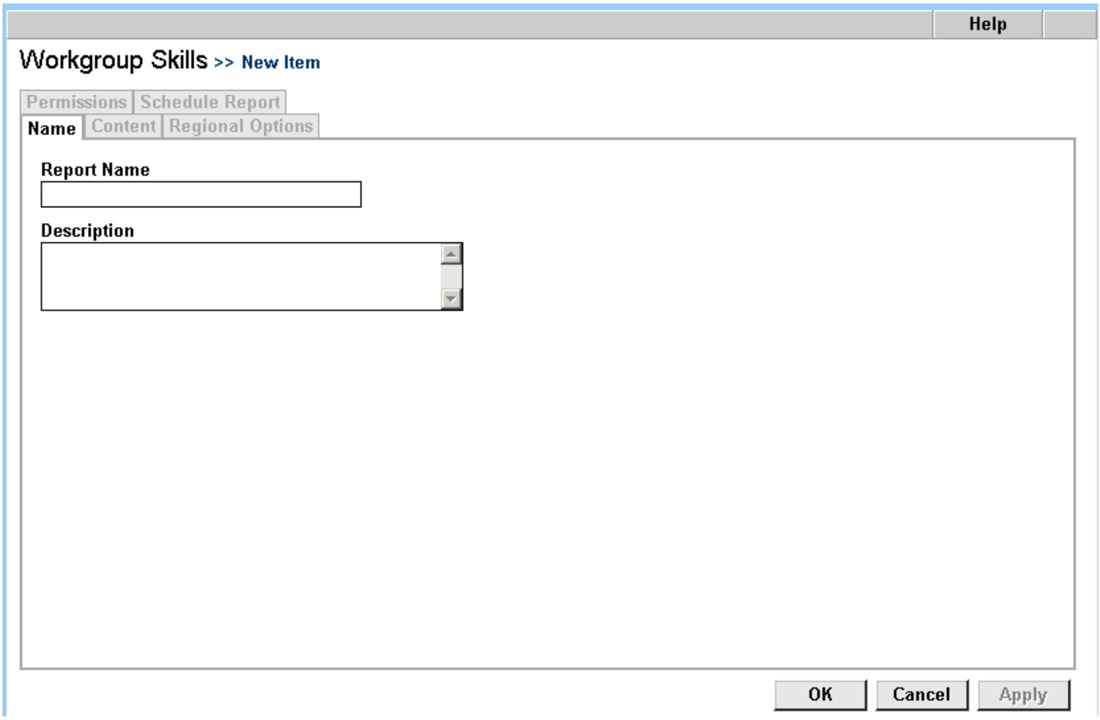


Figure 16-8 Name Tab

3. Using the information in Table 16-7, complete the fields.

Table 16-7. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. This name appears on each page of the report and in the **Name** column of the list of Workgroup Skills Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Workgroup Skills Report definitions.

4. Click the **Content** tab.

   The Content tab of the ***Workgroup Skills Report*** screen (Figure 16-9) appears.

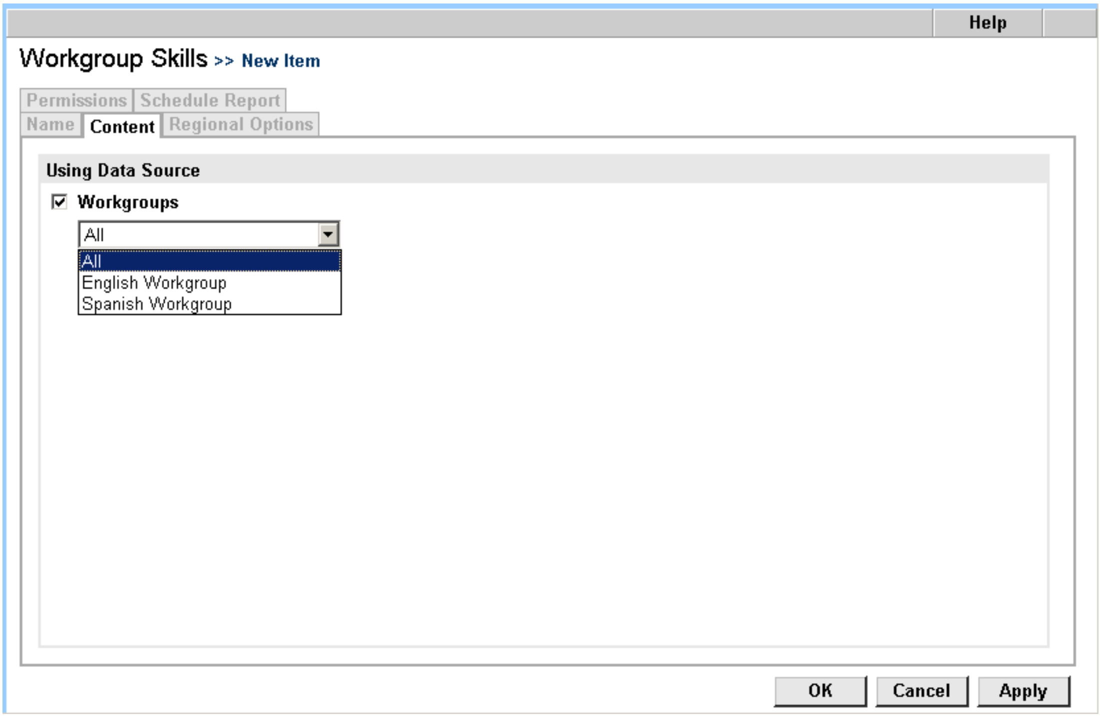


Figure 16-9 Content Tab

5. From the Workgroups drop-down menu, select the Workgroups to appear in the report.

6. Click the **Regional Options** tab. The Regional Options tab of the ***Workgroup Skills Report*** screen (Figure 16-10) appears.

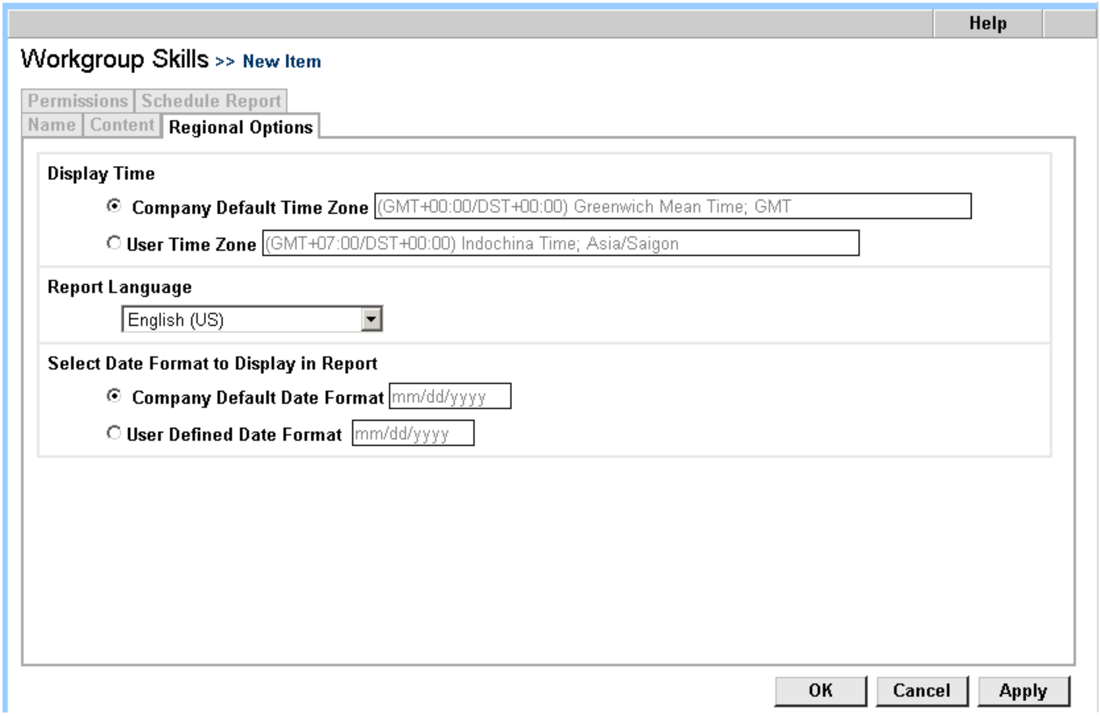


Figure 16-10 Regional Options Tab

7. Using the information in Table 16-8, complete the fields.

Table 16-8. Regional Options Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents are in the language you selected.

Table 16-8. Regional Options Fields and Descriptions

Choose...	To Display...
Company Default Date Format	All dates are formatted using the format set for the company.
User Defined Date Format	All dates are formatted using the format set for your workstation.

8. Click the **Permissions** tab. The Permission tab of the ***Workgroup Skills Report*** screen (Figure 16-11) appears.

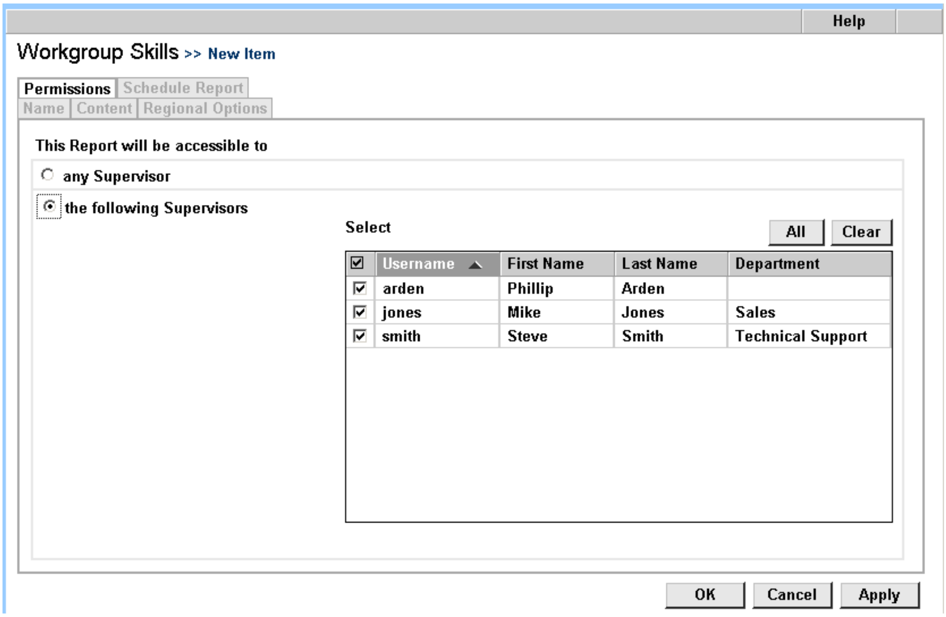


Figure 16-11 Permissions Tab

9. Click the **Any Supervisor** button to give all Supervisors access to the report.

10. Click **The Following Supervisors**, and then, from the list, select the individual supervisors.

11. Click **OK** (or **Apply**).

- For how to view and print a report, see page 15-6.
- For how to delete a report, see page 15-14.

Billing Report

The ***Billing Report*** (Figure 16-12) summarizes the number and duration of interactions in each call center for which you provide service.

The ***Billing Report*** is available for CCA's Service Provider Edition only.

Billing >> Sams Report

from 01/03/2004 at 00:00:00
to 09/03/2004 at 23:59:00

Call Center	Number of Interactions	Duration of Interactions
Ext SIP Agents	1327	32:53:56
H323 and external GW	234	03:28:35
Int SIP Agents	83	00:08:41
Total	1644	36:31:12

Generated on 09/03/2004 at 12:26:29 AM

(GMT+07:00/DST+00:00) Indochina Time; Asia/Saigon

Figure 16-12 Sample Billing Report

Report Elements

Table 16-9 shows the Billing Report elements.

Table 16-9. Billing Report Fields and Descriptions

Item	Description
Call Center	The name of the call center for which you provide service.

Table 16-9. Billing Report Fields and Descriptions

Item	Description
Number of Interactions	The total number of interactions processed by that call center for the time period covered by the report.
Duration of Interactions	The total amount of time that the call center spent processing those interactions.

To create a Billing Report

1. Click **Reports** > **Call Center Operations** > **Billing**. The Billing screen appears, showing a list of reports.

2. Click the **Add** button.

   The Name tab of the ***Add Billing Report*** screen (Figure 16-13) appears.

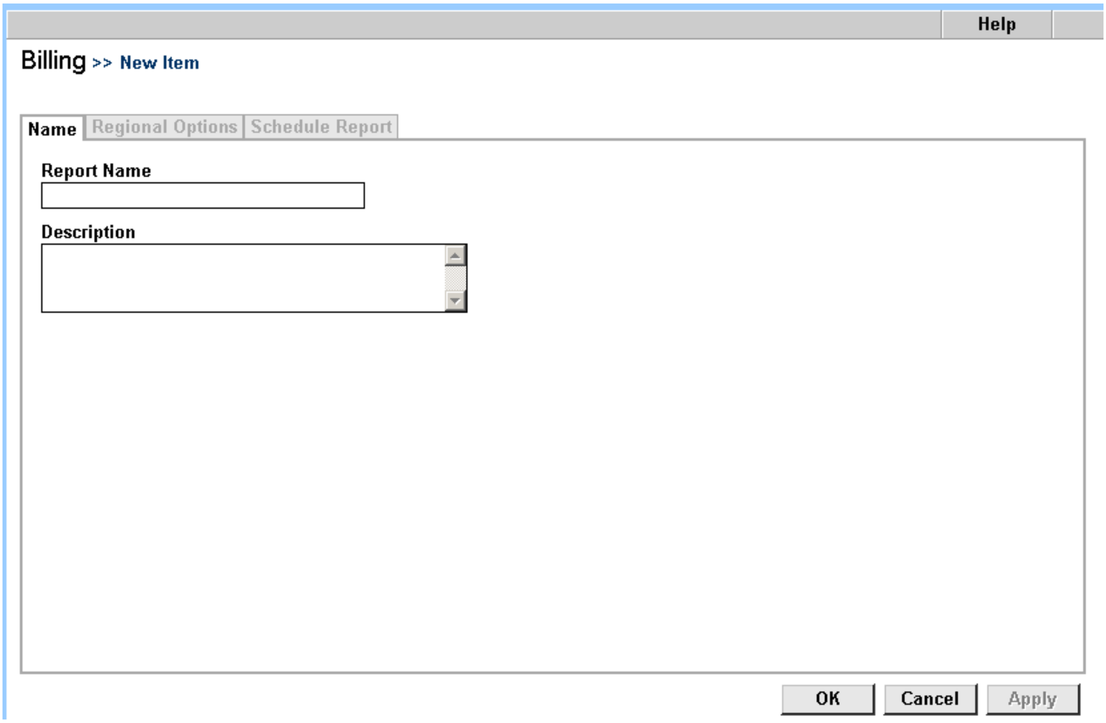


Figure 16-13 Name Tab

3. Using the information in Table 16-10, complete the fields.

Table 16-10. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. This name appears on each page of the report and in the **Name** column of the list of Billing Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Billing Report definitions.

4. Click the **Regional Options** tab.

   The Regional Options tab of the ***Add Billing Report*** screen (Figure 16-14) appears.

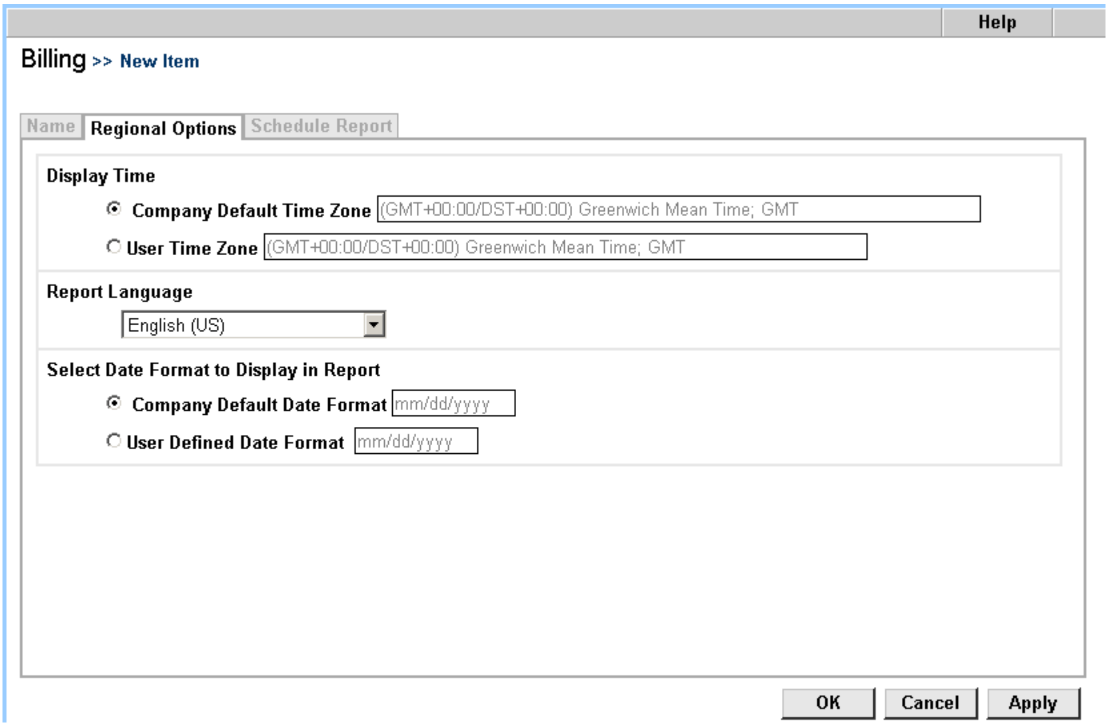


Figure 16-14 Regional Options Tab

5. Using the information in Table 16-11 to complete the fields.

Table 16-11. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents are in the language you selected.
Company Default Date Format	All dates are formatted using the format set for the company.
User Defined Date Format	All dates are formatted using the format set for your workstation.

6. Click **OK** (or **Apply**).

- For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.
- For how to delete a report, see “To delete a report” on page 15-14.

The Workgroup Productivity Reports

The available Workgroup Productivity Reports include:

- Workgroup Segments Report (formerly Workgroup Key Statistics Report) (formerly Workgroup Key Statistics Report)
- Workgroup Interval Time Report
- Workgroup Interval Time by Media Report
- Outcome Statistics Report
- Overdue Callbacks Report

Workgroup Segments Report (formerly Workgroup Key Statistics Report)

The ***Workgroup Segments Report*** (Figure 17-1) shows call center use, agent performance, and billing statistics for selected projects and workgroups.

- This report includes interactions which the Automatic Call Distribution system routes to workgroup agents.
- This report does **not** include calls made directly to an agent or outbound calls made by an agent.

Workgroup Segments >> test

from 11/09/2005 at 00:00:00
to 11/09/2005 at 23:59:00

Report Includes All Projects

Segment Events	TOTAL	%	Abandoned Interval	TOTAL	%	Agent Answered Interval	TOTAL	%
Agent Answered	6	85.71 %	Under 0 min 30 sec	1	100.00 %	Below Threshold 1	6	100.00 %
Abandoned	1	14.29 %	0 min 31 sec to 1 min 0 sec	0	0.00 %	Threshold 1 to Threshold 2	0	0.00 %
Callback Calls	0	0.00 %	1 min 1 sec to 1 min 30 sec	0	0.00 %	Greater than Threshold 2	0	0.00 %
Voicemail	0	0.00 %	1 min 31 sec to 2 min 0 sec	0	0.00 %			
Other Workgroups	0	0.00 %	Over 2 min 0 sec	0	0.00 %			
No Answer	0	0.00 %						
Other Events	0	0.00 %						
Total Segments Received	7	100 %	Total Segments Abandoned	1	100 %	Total Segments Answered by Agent	6	100 %

Media Type Segments Handled	TOTAL	%	Agent Segment Processing	TOTAL
Workgroup Calls	6	85.71 %	Average Speed of Answer	00:00:03
Workgroup Voicemail	1	14.29 %	Average Talk Time	00:01:10
Callback	0	0.00 %	Average Wrap Up Time	00:00:08
Web Callback	0	0.00 %	Average Handle Time per Segment	00:01:19
Chat	0	0.00 %	Average Hold Time	00:00:00
Workgroup Email	0	0.00 %		
Workgroup Fax	0	0.00 %		
Total Segments Received	7	100 %		

Summary	TOTAL
Total Segments Received	7
Total Segments Answered by Agent	6
Number of Times Segments Went to Hold	0
Duration of Handled Segments	00:07:56
Total Wait To Answer Time	00:00:22
Shortest Wait to Answer Time	00:00:00
Longest Wait to Answer Time	00:00:17
Average Ring Time	00:00:03
Average Time to Abandoned	00:00:04
OverFlow In	0
OverFlow Out	0
Transferred In	0

Generated on 11/09/2005 at 01:27:16 PM

(GMT-08:00/DST+00:00) Pacific Standard Time; America/Los_Angeles

Figure 17-1 Sample Workgroup Segment Report

Report Elements

The areas of the ***Workgroup Segment Report*** include:

- Segment Events
- Abandoned Interval
- Agent Answered Interval
- Agent Segment Processing
- Summary

Supervisors should remember that this report includes activity for all agents in the selected project or workgroup, not just the agents for a specific supervisor.

Segment Events

Table 17-1 shows the fields and descriptions for the **Segment Events** area, which displays information for interactions received by the call center.

Table 17-1. Segment Events Fields and Descriptions

Item	Description
Agent Answered	The number of workgroup interactions routed to and accepted by agents.
Abandoned	The number of workgroup interactions received by the call center but abandoned by the customer before being accepted by an agent.
Callback Calls	The number of callback and Web callback interactions handled by the call center.
Voicemail	The number of calls in which the caller left a voicemail message for a workgroup agent - rather than wait in the queue to be connected to an agent.
Other Workgroups	The total number of agents busy working on interactions for other workgroups.
No Answer	The total number of interactions sent to but not answered by an agent.
Other Events	The total number of events that overflowed back to a project menu or where the project results are “other.”
Total Segments Received	The total number of interactions coming into the call center for this segment.

Abandoned Interval

Table 17-2 shows the fields and descriptions for the **Abandoned Interval** area, which displays statistics for the time customers waited before deciding to abandon their attempt to reach the call center.

Table 17-2. Abandoned Interval Fields and Descriptions

Item	Description
under 0 min 30 Seconds	The number of interactions that were abandoned in under 30 seconds.
0 min 31 sec to 1 min 0 sec	The number of interactions that were abandoned after waiting 30 seconds, but less than 60 seconds.
1 min 1 sec to 1 min 30 sec	The number of interactions that were abandoned after waiting 61 seconds, but less than 1 minute and 30 seconds.
1 min 31 sec to 2 min	The number of interactions that were abandoned after waiting between 1 minute and 30 seconds and 2 minutes.
Over 2 min 0 sec	The number of interactions that were abandoned after waiting more than 2 minutes.
Total Segments Abandoned	The total number of interactions that were abandoned for this segment.

Agent Answered Interval

Table 17-3 shows the fields and descriptions for the **Agent Answered Interval** area, which displays statistics for how long customers waited before being connected to an agent.

Table 17-3. Wait Time to Accept Interaction Fields and Descriptions

Item	Description
Below Threshold 1	The total number of interactions accepted by an agent before expiration of the Threshold 1 time limit (set in the Content tab of the report definition).
Below Threshold 2	The total number of interactions accepted by an agent before expiration of the Threshold 2 time limit (set in the Content tab of the report definition).
Greater than Threshold 2	The total number of interactions accepted by an agent exceeding the Threshold 2 value and expiration limits (set in the Content tab of the report definition).

Table 17-3. Wait Time to Accept Interaction Fields and Descriptions

Item	Description
Total Segments Answered by Agent	The total number of interactions routed to and accepted by workgroup agents. Direct-dialed calls are not included in this report. (See "Direct Dialing Statistics Reports" on page 19-29 for information on direct-dialed calls).

Media Type Segments Handled

Table 17-4 shows the fields and descriptions for the **Media Type Segments Handled** area, which displays the number of interactions of each media type handled by the selected projects or workgroups.

Table 17-4. Media Type Segment Handled Fields and Descriptions

Item	Description
Workgroup Calls	The number and percentage of interactions that reached the call center by phone, were routed to a workgroup, and subsequently handled by an agent. **Note**: This does NOT include predictive calls and preview calls.
Workgroup Voicemails	The number and percentage of interactions that reached the call center by phone, were routed to a workgroup, and elected to leave a voicemail message rather than wait in the workgroup queue for an agent.
Callback	The number and percentage of interactions that reached the call center by phone, were routed to a workgroup, and requested a call-back rather than wait in the workgroup queue for an agent.
Web Callback	The number and percentage of customers who reached the call center by requesting a callback from an agent (using the company's Website).
Chat	The number and percentage of customers who reached the call center by requesting a chat with an agent (using the company's Website).
Workgroup Email	The number and percentage of interactions that reached the call center by email, were routed to a workgroup, and subsequently handled by an agent.

Table 17-4. Media Type Segment Handled Fields and Descriptions

Item	Description
Workgroup Fax	The number and percentage of fax interactions that were routed to a workgroup and subsequently handled by an agent.
Total Segments Received	The total number of interactions received from all media types in this segment (including workgroup calls, workgroup voicemails, callbacks, Web callbacks, chat, workgroup emails, and workgroup faxes).

These statistics include only the interaction types you selected (from the **Include Statistics On** area of the Content tab).

Agent Segment Processing

Table 17-5 shows the fields and descriptions for the **Agent Segment Processing** area, which displays the average time agents spent in various phases of the interaction.

Table 17-5. Agent Call Processing Fields and Descriptions

Item	Description
Average Speed of Answer	The average time for agents to answer an interaction.
Average Talk Time	The average time agents spent on a call. Time starts when agent accepts an ACD call and ends when the call is removed from agent (including any hold time inbetween). **Note**: The Wrap-up time is NOT included.
Average Wrap Up Time	The average time agents spent wrapping-up interactions (where agent status = Wrap Up).
Average Handle Time per Segment	The average time agents spent handling a call. (The sum of Average Talk Time + Average Wrap-up Time). **Note**: Hold time is NOT included.
Average Hold Time	The average time agents kept callers on hold (for the segments that went on hold).

Example Calculations:

The call center received:

Calls	Talk Time	Hold Time	Wrap-up Time
98	5 min	0	1 min
2	5 min	5 min	1 min

98 calls: each 5 min long, none on hold, and 1 min wrap-up
2 calls: each 5 min long, 5 min on hold, and 1 min wrap-up

The results are calculated as:

98	*	(5 + 1)	=	588
2	*	(10 + 1)	=	22
		Total	=	610

Therefore, 610/100 = **6.1** minutes of average handle time per segment.

Summary

Table 17-6 shows the fields and descriptions for the **Summary** area, which displays overview data for interactions received and for interaction wait times.

Table 17-6. Summary Fields and Descriptions

Item	Descriptions
Total Segments Received	The total number of interactions received by your company.
Total Segments Answered by Agent	The total number of interactions received by CCA, routed to a workgroup, and handled by an agent.
Number of Times Segments Went to Hold	The total number of voice interactions placed on hold, at any time, by an agent.
Duration of Handled Segments	The total time interactions spent in the system. CCA calculates this as the difference between the time CCA received the interaction and the conclusion of the interaction.

Table 17-6. Summary Fields and Descriptions

Item	Descriptions
Total Wait to Answer Time	The total time interactions spent waiting for an agent in a workgroup queue.
Shortest Wait to Answer Time	How long the interaction with the shortest queue time waited for an agent.
Longest Wait to Answer Time	How long the interaction with the longest queue time waited for an agent.
Average Ring Time	The average ring time. (This is calculated as the total ring time / number of calls offered to the agent.)
Average Time to Abandoned	The average time before the interaction was abandoned for all segments of the interaction.
OverFlow In	The total number of ACD interactions that were answered in the overflow workgroup. The count begins when the interaction is answered by the overflow workgroup. All answered segments are counted (even when answered by agent, voicemail, callback, and menu).
OverFlow Out	The total number of ACD interactions that were answered in the original workgroup and overflowed. The count begins when the interaction is answered by the overflowed workgroup. All answered segments are counted (including those answered by agent, voicemail, callback, or menu.)
Transferred In	The number of interactions that entered the workgroup by way of a transfer.

To create a Workgroup Segments Report

1. Click **Reports** > **Workgroup Productivity** > **Workgroup Segments**. The Workgroup Segments screen appears, listing reports.

2. Click the **Add** button. The Name tab of the ***Add Workgroup Segments*** report (Figure 17-8) appears.

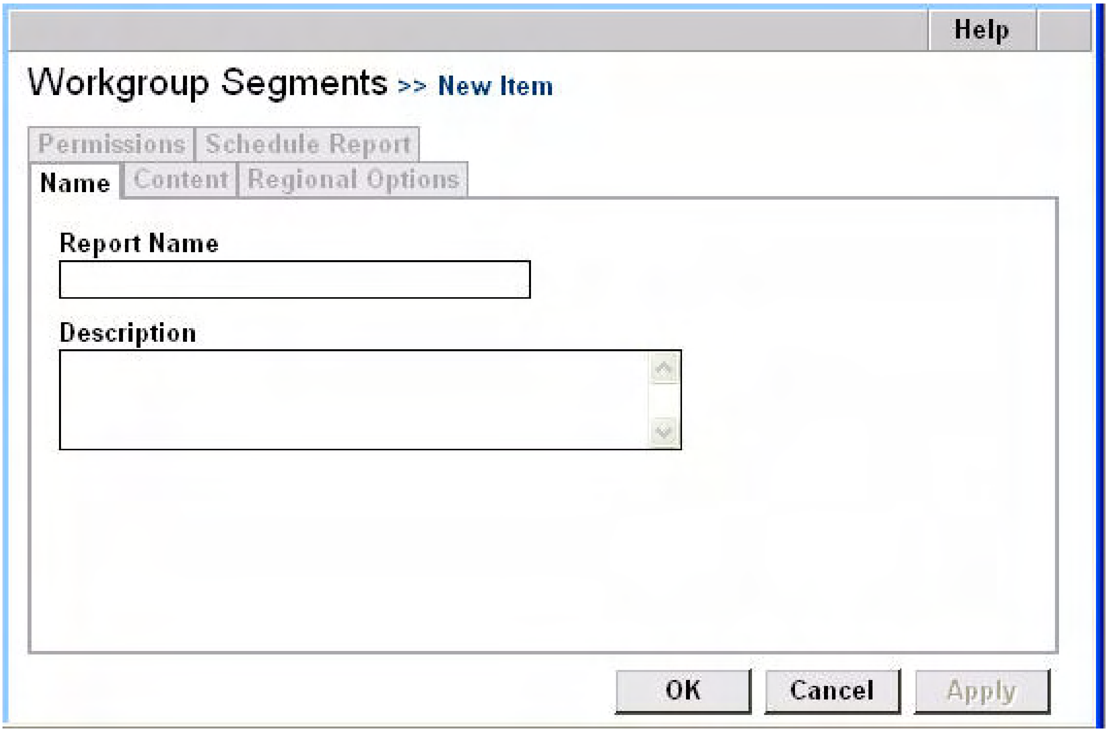


Figure 17-2 Name Tab

3. Using the information in Table 17-7, complete the fields.

Table 17-7. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Workgroup Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Workgroup Segments Report definitions.

4. Click the **Content** tab. The Content tab of the ***Workgroup Segments Report*** (Figure 17-3) appears.

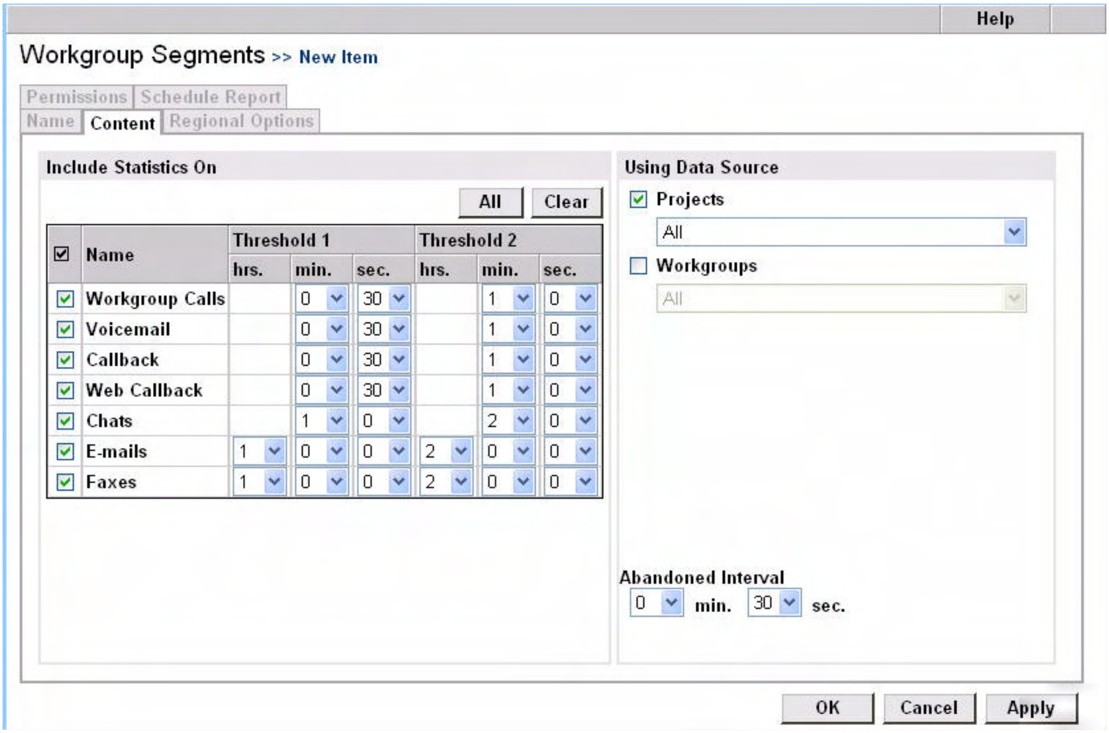


Figure 17-3 Content Tab

5. Using the information in Table 17-8, complete the fields.

Table 17-8. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	In the report in the **Include Statistics On** area, check the interaction types to include. (Click **All** to include all interaction types or click **Clear** to clear all the check boxes.)
Threshold 1	For each interaction type, choose how long to measure agent performance for that interaction type. For example, if you enter 1 minute for Threshold 1, the Workgroup Segments Report shows the number and percentage of interactions the agent accepted before the customer waited 1 minute in the queue.

Table 17-8. Content Tab Fields and Descriptions

Field	Description
Threshold 2	For each interaction type, choose how long to measure agent performance for that interaction type. For example, if you enter 5 minutes for Threshold 2, the Workgroup Segments Report shows the number and percentage of interactions the agent accepted before the customer waited 5 minutes in the queue, as well as the number of interactions the agent accepted after the customer waited 5 minutes in the queue.
Using Data Source	Identify the data source to use by clicking the **Projects** check box and then select one or all projects from the drop-down menu. Click the **Workgroups** check box and then select one or all projects from the drop-down menu.

6. Click the **Regional Options** tab. The Regional Options tab (Figure 17-4) of the ***Workgroup Segments Report*** appears.

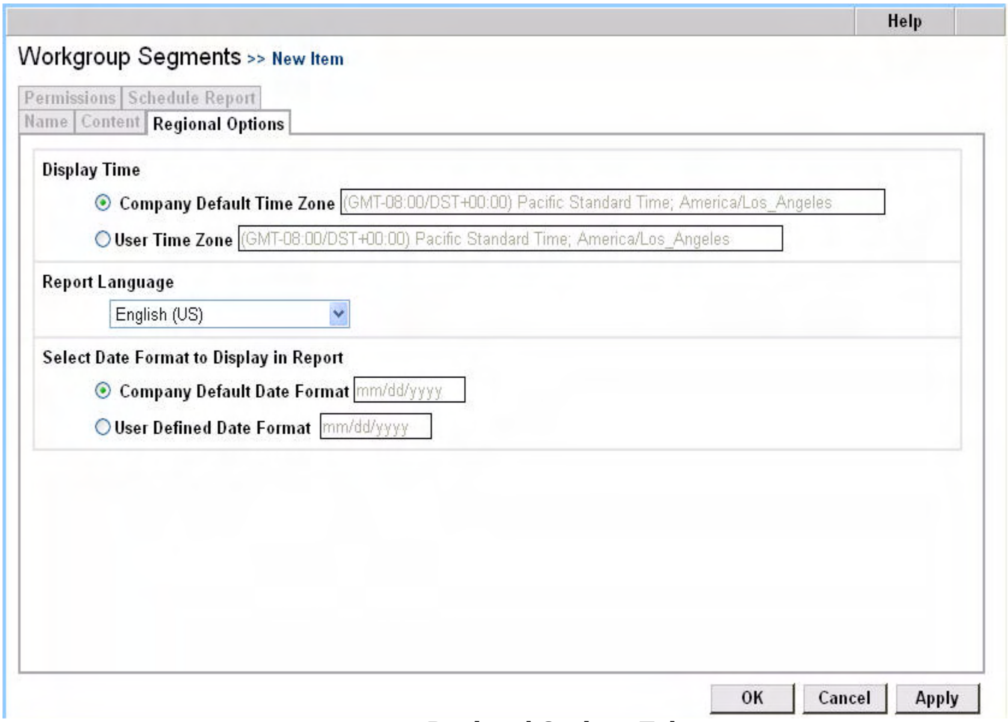


Figure 17-4 Regional Options Tab

7. Using the information in Table 17-9, complete fields.

Table 17-9. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the time zone set for the company.
User Time Zone	All times using the time zone set for your workstation.
Report Language	All report contents in the language you choose.
Company Default Date Format	All dates using format set for the company.
User Defined Date Format	All dates using the format set for your workstation.

8. Click the **Permissions** tab. The Permissions tab (Figure 17-5) of the ***Workgroup Segments Report*** appears.

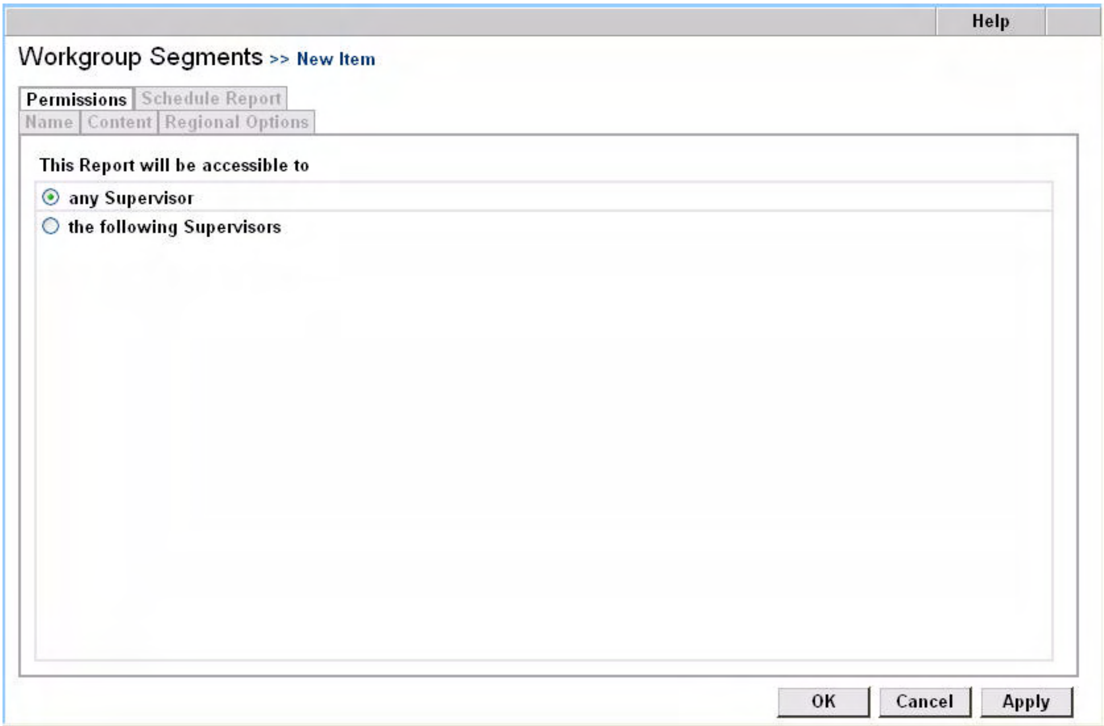


Figure 17-5 Permissions Tab

9. Grant permission to view and print this report to:

   a. Check **any Supervisor** so that all supervisors have access.

   b. Check **the following Supervisors** and then select the individual supervisors, which will have access.

      Supervisors not checked will not see the report definition in SM.

   c. Click **Clear** to clear all selections.

   a. Click **OK** (or **Apply**).

10. Click the **Schedule Report** tab (Figure 17-6).

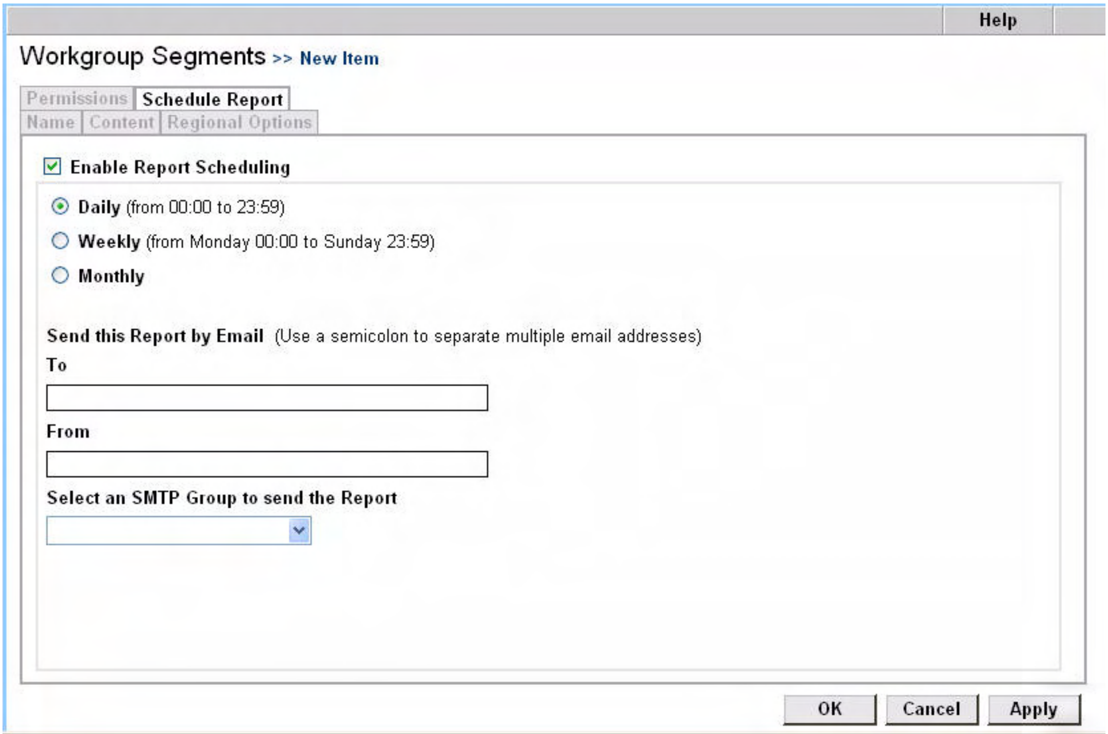


Figure 17-6 Schedule Report Tab

a. Check the **Enable Report Scheduling** check box.

b. Using the information in Table 17-10, complete fields.

Table 17-10. Schedule Report Tab Fields and Descriptions

Field	Description
Daily Weekly, Monthly	Click the button identifying how often to run this report.
To	Type the email address for everyone who should receive this report. Use a semicolon to separate addresses, such as joesmith@taw.com; tturner@alo.com.
From	Type your email address (or the address of the person responsible for sending this report).
Select an SMTP Group to send the Report	From the drop-down menu, select the STMP group that also receives this report.

11. Click **OK** (or **Apply**).

- For how to view and print a report, see page 15-6. Also, since selecting a start and end time for this report is slightly different than for other reports, see “A Note About Start and End Times” on page 15-10.

- For how to delete a report, see page 15-14.

Workgroup Interval Time Report

The ***Workgroup Interval Time Report*** shows how agents are performing at specific times of the day. You can report on time intervals as short as 1 minute and as long as 60 minutes. Figure 17-7 shows an example ***Workgroup Interval Time Report*** for intervals of 60 minutes.

Workgroup Interval Time >> test

from 03/02/2006 at 00:00:00
to 03/02/2006 at 23:59:00

Report Includes All Projects, Workgroup Calls, Voicemail, Callback, Web Callback, Chats, E-mail, Faxes,

Interval	Agent Answered			Abandoned		Agent Answered	Service Performance Level
	Below Threshold 1	Threshold 1 to Threshold 2	Greater than Threshold 2	Above Threshold 1	Total		
00:00-00:15	0	0	0	0	0	0	0.0 %
00:15-00:30	0	0	0	0	0	0	0.0 %
00:30-00:45	0	0	0	0	0	0	0.0 %
00:45-01:00	0	0	0	0	0	0	0.0 %
01:00-01:15	0	0	0	0	0	0	0.0 %
22:00-22:15	0	0	0	0	0	0	0.0 %
22:15-22:30	0	0	0	0	0	0	0.0 %
22:30-22:45	0	0	0	0	0	0	0.0 %
22:45-23:00	0	0	0	0	0	0	0.0 %
23:00-23:15	0	0	0	0	0	0	0.0 %
23:15-23:30	0	0	0	0	0	0	0.0 %
23:30-23:45	0	0	0	0	0	0	0.0 %
23:45-00:00	0	0	0	0	0	0	0.0 %
Total	9	0	1	2	2	10	75.0 %

Generated on 03/02/2006 at 06:48:57 PM

(GMT+00:00/DST+00:00) Greenwich Mean Time; GMT

Figure 17-7 Sample Workgroup Interval Report

Report Elements

Each row of the report shows a single time interval based on the value entered in the **Set Threshold Times** on the Content tab.

Table 17-11 describes the contents of each column of the Workgroup Interval Time Report.

Table 17-11. Workgroup Interval Time Report Columns

Column		Description
Interval		The time span to report on in each row of the report. You can set the length for each interval in the Set Interval field on the Content tab when creating the report definition. The total number of rows in the report is based on your specified Interval Time and the period covered by your report. For example, if you create a report for the period between 2:00 p.m. and 4:00 p.m. of a single day, and you specified an Interval Time of 15 minutes, your report will contain eight rows.
Agent Answered		The three columns under this heading correspond to the number of interactions accepted by Agents.
	Below Threshold 1	The total number of interactions accepted by agents within the first defined threshold for interactions set for the report.
	Threshold 1 to Threshold 2	The total number of interactions accepted by agents within the second defined threshold for interactions set for the report.
	Greater than Threshold 2	The total number of interactions accepted by agents outside of the second threshold for interactions set for the report.
Abandon Interactions		The total number of interactions where the client disconnected after entering the queue but before reaching an agent.
	Total Interactions	Total number of interactions received.
Service Performance Level		The percentage of calls answered within the time specified (up to 60 seconds and as little as 5 seconds) in the **Calls must be answered within** or **Chats must be answered within** controls of the Content tab.

To create a Workgroup Interval Time Report

1. Click **Reports** > **Workgroup Productivity** > **Workgroup Interval Time**. The Workgroup Interval Time screen appears, listing reports

2. Click the **Add** button. The Name tab of the ***Add Workgroup Interval Time*** report (Figure 17-18) appears.

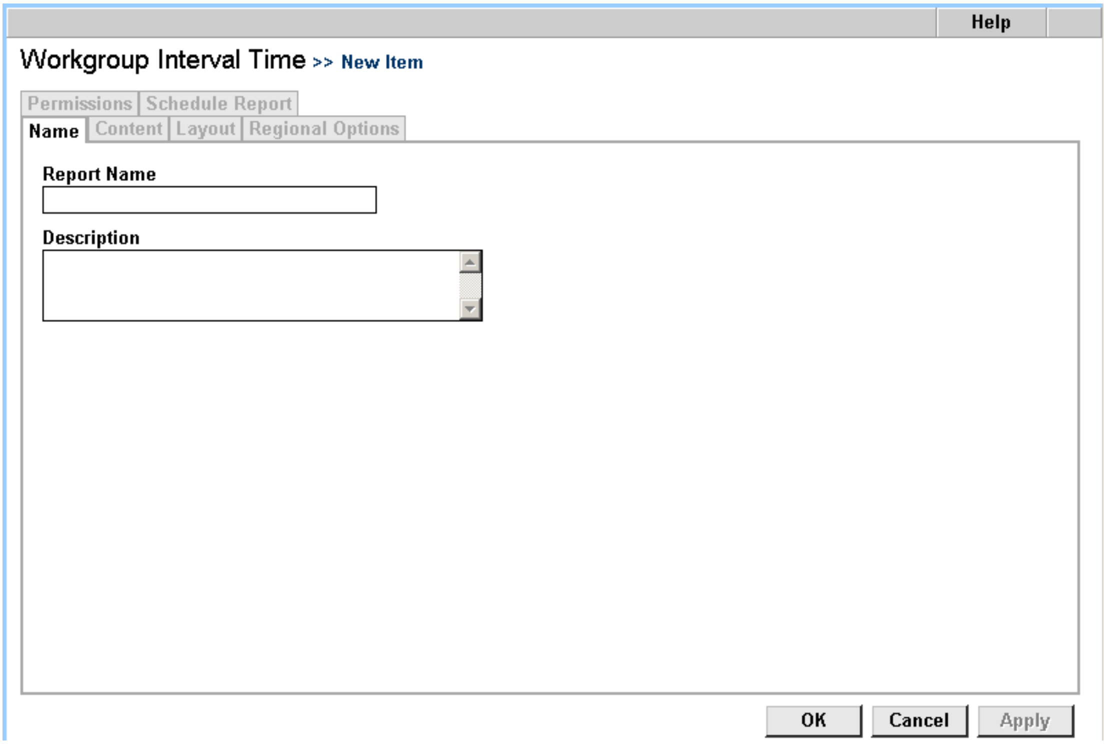


Figure 17-8 Name Tab

3. Using the information in Table 17-12, complete the fields.

Table 17-12. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Workgroup Interval Time report definitions.

Table 17-12. Name Tab Fields and Descriptions

Field	Description
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Workgroup Interval Time report definitions.

4. Click the **Content** tab. The Content tab of the ***Workgroup Interval Time Report*** (Figure 17-9) appears.

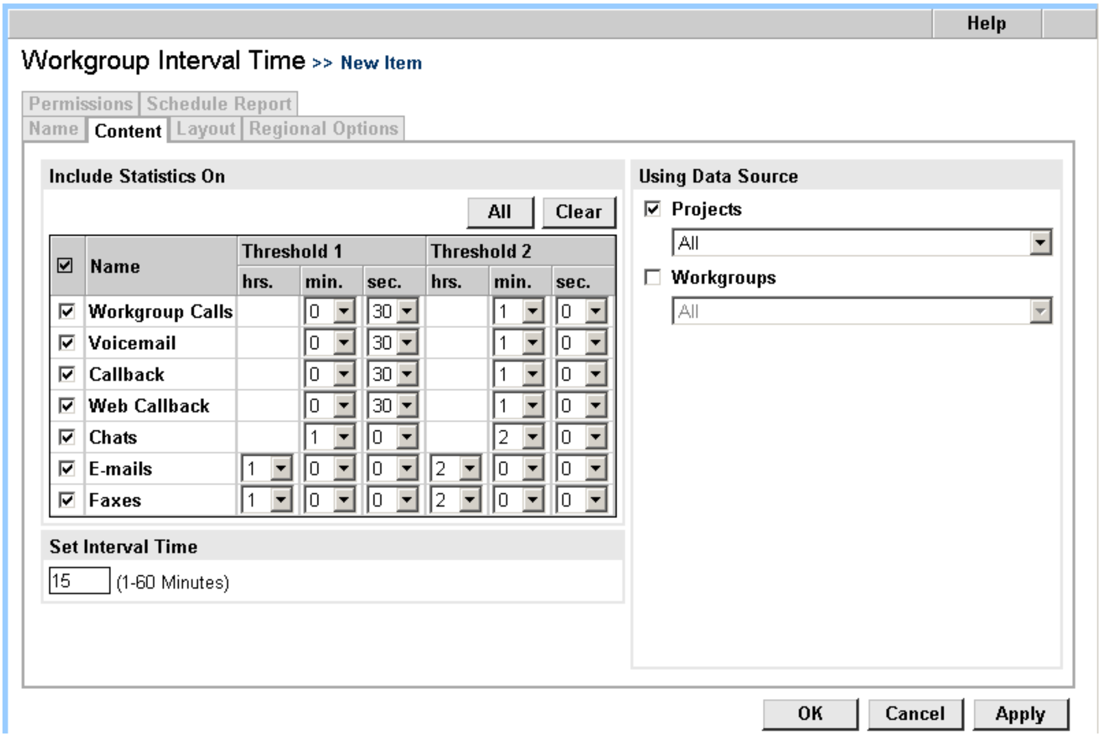


Figure 17-9 Content Tab

5. Using the information in Table 17-13, complete fields.

Table 17-13. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	In the **Include Statistics On** area, click the elements to include in the report: • **Workgroup Calls** to report on phone interactions • **Callbacks** to report on ACD callback interactions • **Web Callback** to report on ACD Web callback interactions • **Chats** to report on chat interactions • **Emails** to report on email interactions • **Voicemail**s to report on ACD voicemails • **Faxes** to report on fax interactions
Interval Time	Type how long to set the time interval for the report (15 min., 60 min, and so on).
Set Threshold Times	From the drop-down menus, select values for first and second thresholds for agents to respond to each type of interaction. (Select the time in hours, minutes, and seconds, as appropriate.)
Using Data Source	Identify the data source: Click **Projects** and then, from the drop-down menu, select one or all projects. Click **Workgroups** and then, from the drop-down menu, select one or all workgroups.

6. Click the **Layout** tab. The Layout tab of the ***Workgroup Interval Time Report*** (Figure 17-10) appears.

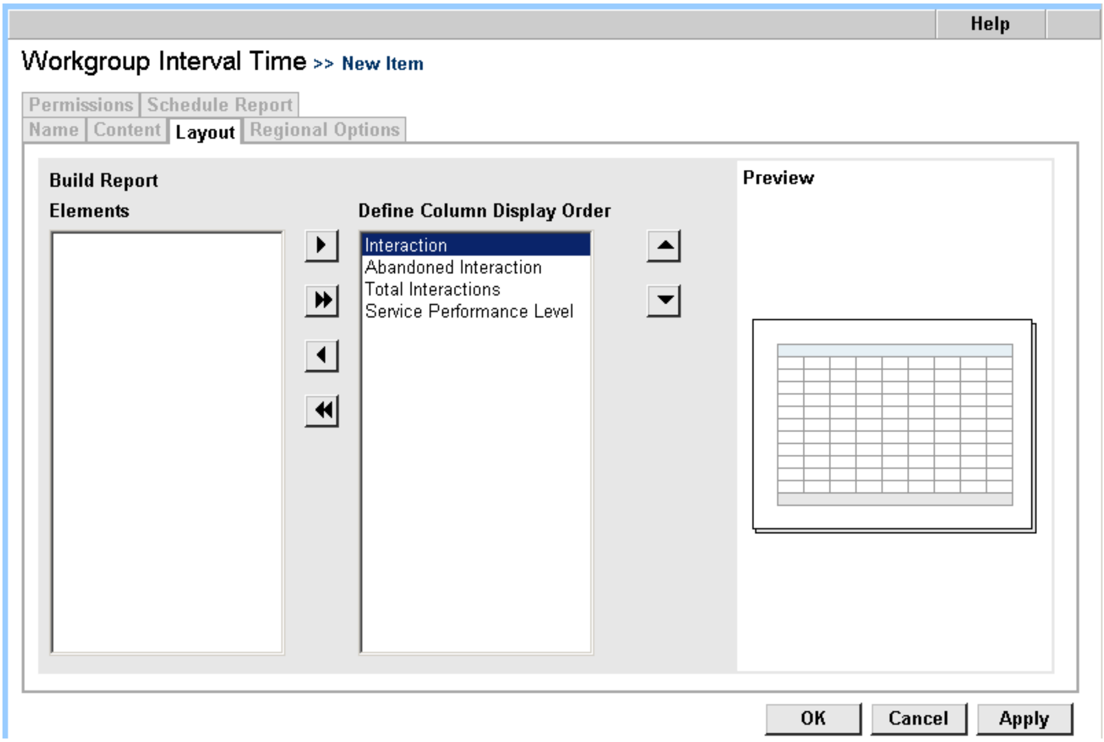


Figure 17-10 Layout Tab

7. Using the information in Table 17-14, complete fields.

Table 17-14. Layout Tab Fields and Descriptions

Field	Description
Build Report	Identify which elements to include in the report. Click the item and then click the left arrow (or just click the double-left arrow to include all elements). Arrange the order of the report columns by clicking an element and then clicking the up arrow ( ) to move a column to the up or click the down arrow ( ) to move the column to the down.

8. Click the **Regional Options** tab. The Regional Options tab of the ***Workgroup Interval Time Report*** (Figure 17-11) appears.

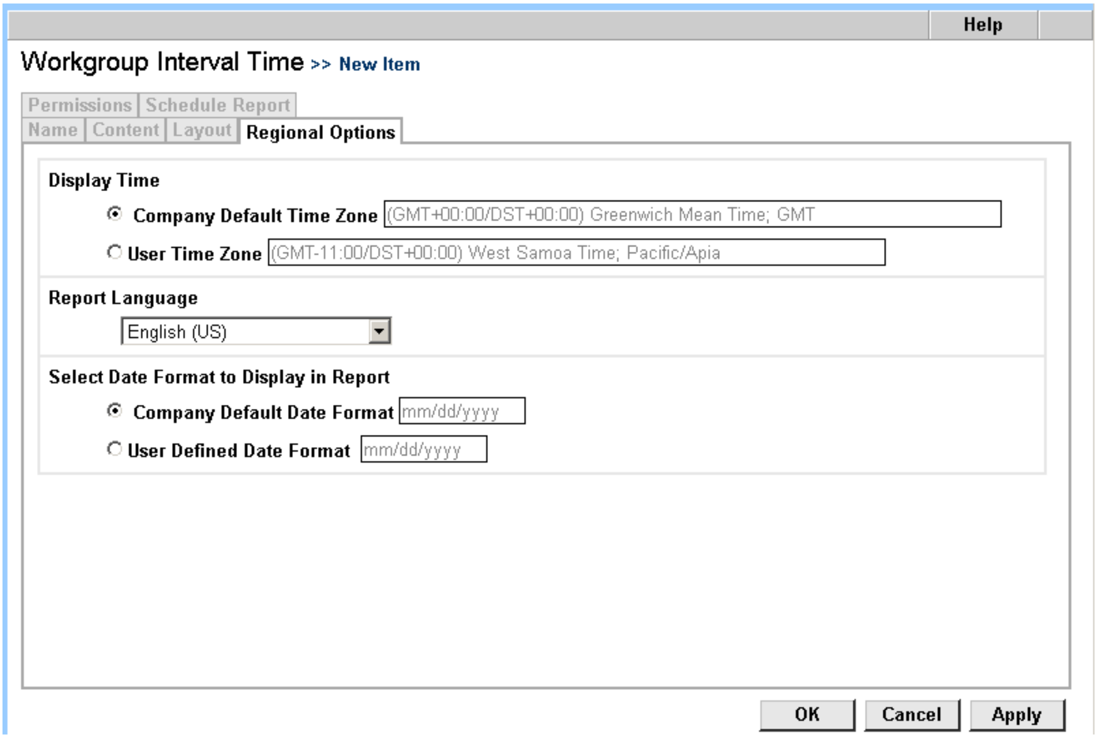


Figure 17-11 Regional Options Tab

9. Using the information in Table 17-15, complete the fields.

Table 17-15. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the time zone set for the company.
User Time Zone	All times using the time zone set for your workstation.
Report Language	All report contents in the language you choose.
Company Default Date Format	All dates using the format set for the company.
User Defined Date Format	All dates using the format set for your workstation.

10. Click the **Permissions** tab. The Regional Options tab of the ***Workgroup Interval Time Report*** (Figure 17-12) appears.

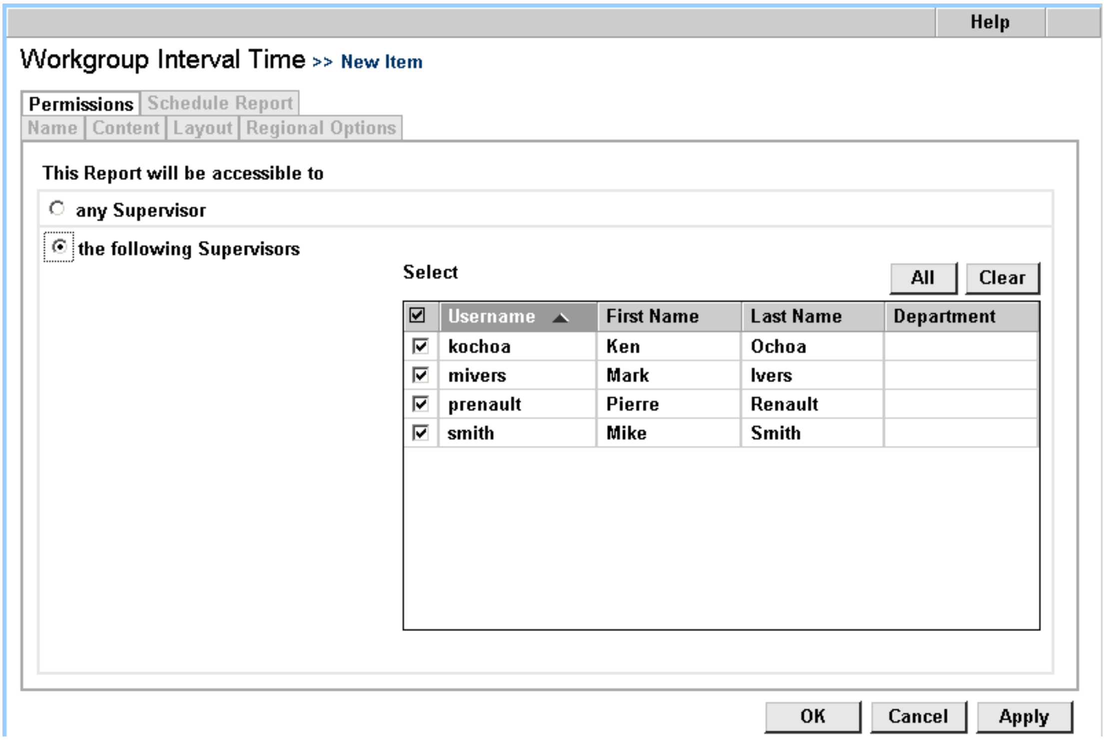


Figure 17-12 Permissions Tab

11. Identify the supervisors who can view and print this report.

    a. Click **any Supervisor** to grant permission to any supervisor.

    b. Click **the following Supervisors** and then select individual supervisors to grant them access. (Supervisors not checked cannot see the report definition in SM.)

    c. Click **All** to include the entire list or click **Clear** to clear all selections.

12. Click **OK**.

    - For how to view and print a report, see page 15-6. Also, since selecting a start and end time for this report is slightly different than for other reports, see "A Note About Start and End Times" on page 15-10.

    - For how to delete a report, see page 15-14.

Workgroup Interval Time by Media Report

The ***Workgroup Interval Time by Media Report*** (Figure 17-13) shows how agents are performing at specific times of the day. Report on time intervals as short as 1 minute and as long as 60 minutes.

Use the **Set Interval Time** control to specify the length of the time intervals for the report. Figure 17-13 shows a sample ***Workgroup Interval Time by Media Report*** displaying intervals of 60 minutes.

Workgroup Interval Time By Media Report >> Report for 12/17/02

from 01.12.2002 at 00:00
to 17.12.2002 at 23:59

Report Includes All Workgroups:

Interval	Workgroup Calls	Callback	Workgroup Email	Workgroup Fax	Web Callback	Chat	Workgroup Voicemail	Total
00:00-01:00	0	0	0	0	0	0	0	0
01:00-02:00	0	0	0	0	0	0	0	0
02:00-03:00	0	0	0	0	0	0	0	0
03:00-04:00	0	0	0	0	0	0	0	0
04:00-05:00	0	0	0	0	0	0	0	0
05:00-06:00	0	0	0	0	0	0	0	0
06:00-07:00	0	0	0	0	0	0	0	0
07:00-08:00	1	0	0	0	0	0	0	1
08:00-09:00	22	4	0	0	0	0	0	26
09:00-10:00	2	0	0	0	0	0	0	2
10:00-11:00	32	0	5	0	1	0	0	38
11:00-12:00	34	7	4	0	1	5	4	55
12:00-13:00	17	1	9	0	0	2	1	30
13:00-14:00	29	6	4	0	10	2	4	55
14:00-15:00	33	1	0	0	1	5	9	49
15:00-16:00	23	5	2	0	7	6	5	48
16:00-17:00	48	1	5	0	1	4	10	69
17:00-18:00	43	0	33	0	0	1	4	81
18:00-19:00	7	0	5	0	8	5	2	27
19:00-20:00	2	0	1	0	0	1	0	4
20:00-21:00	0	0	0	0	0	9	0	9
21:00-22:00	0	0	0	0	0	0	0	0
22:00-23:00	0	0	0	0	0	0	0	0
Total	293	25	68	0	29	40	39	494

Generated on 17.12.2002 at 18:25

(GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 17-13 Sample Workgroup Interval Time By Media Report

Report Elements

Each row of the ***Workgroup Interval Time by Media Report*** is dedicated to a single time interval based on the value you set in the **Set Interval Time** on the Content tab.

Table 17-16 shows the report columns and descriptions.

Table 17-16. Workgroup Interval Time by Media Report Columns

Column	Description
Interval	The time span to report on in each row of the report. Set the length for each interval in the **Set Interval Time** field on the Content tab when creating the report definition. The total number of rows in the report is based on your specified Interval Time and the period covered by the report. For example, if you create a report for between 2:00 p.m. and 4:00 p.m. of a single day, and you specified an Interval Time of 15 minutes, your report will contain eight rows.
Workgroup Calls	The total number of workgroup phone calls accepted by agents.
Callback	The total number of callback interactions accepted by agents.
Workgroup Email	The total number of workgroup email interactions accepted by agents.
Workgroup Fax	The total number of workgroup fax interactions accepted by agents.
Web Callback	The total number of Web callback interactions accepted by agents.
Chat	The total number of chat interactions accepted by agents.
Workgroup Voicemail	The total number of workgroup voicemail interactions accepted by agents.
Total	Total number of interactions received.

To create a Workgroup Interval Time by Media Report

1. Click **Reports** > **Workgroup Productivity** > **Workgroup Interval Time by Media**. The Workgroup Interval Time by Media screen appears.

2. Click the **Add** button.

The Name tab of the ***Workgroup Interval Time by Media Report*** (Figure 17-14) appears.

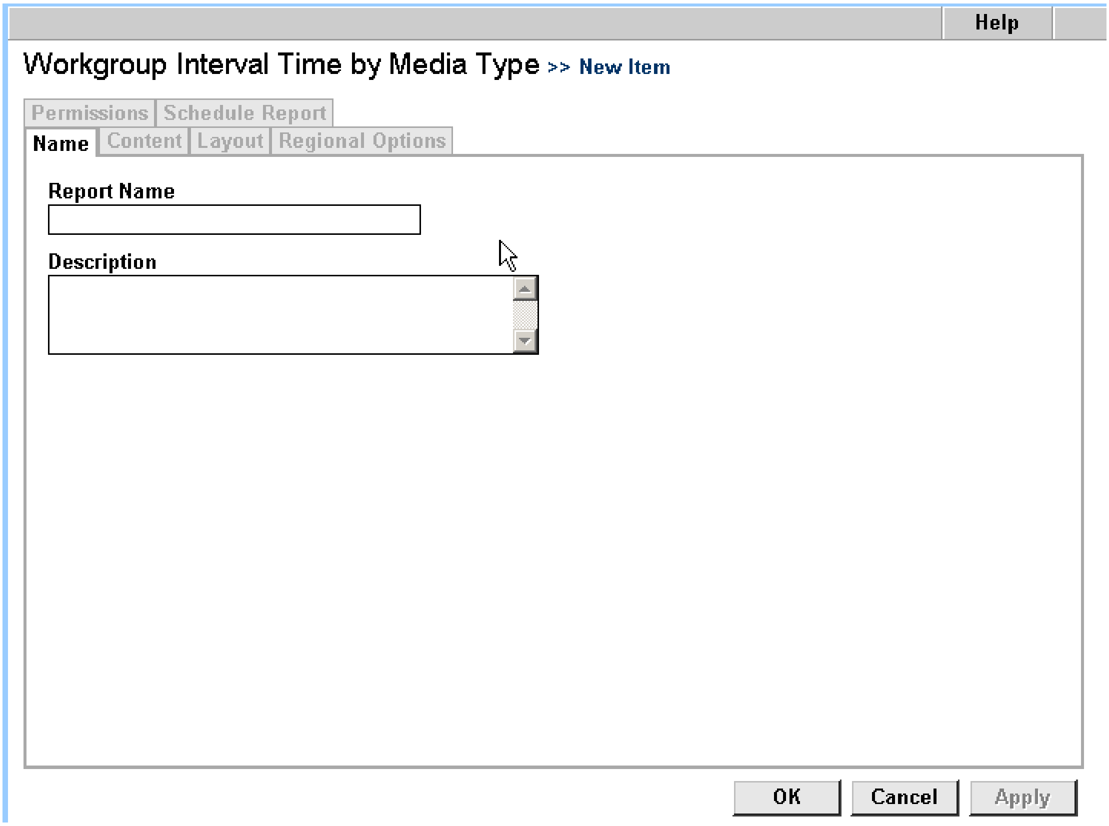


Figure 17-14 Name Tab

3. Using the information in Table 17-17, complete the fields.

Table 17-17. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Workgroup Interval Time by Media report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Workgroup Interval Time by Media report definitions.

4. Click the **Content** tab.

The Content tab of the ***Workgroup Interval Time by Media Report*** (Figure 17-15) appears.

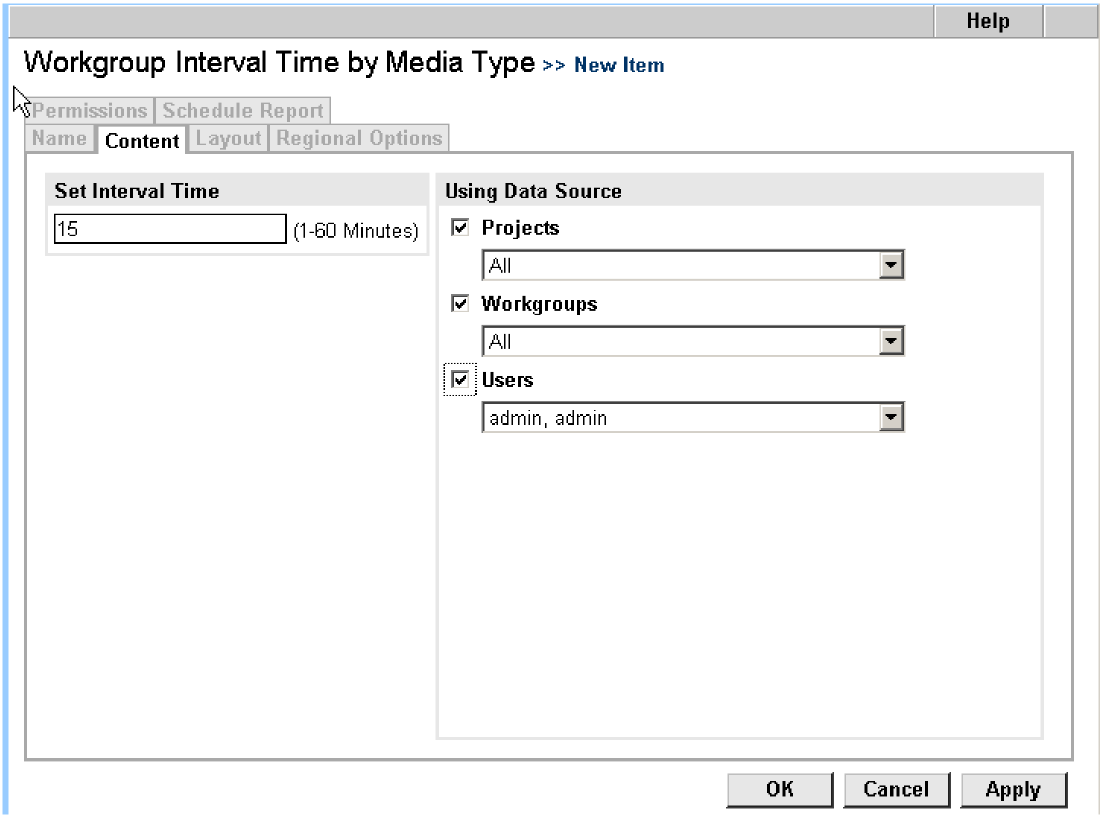


Figure 17-15 Content Tab

5. Using the information in Table 17-18, complete the fields.

Table 17-18. Content Tab Fields and Descriptions

Field	Description
Set Interval Time	Type the number of minutes to report on in each row of the report. (For example, an interval of 60 minutes produces 24 rows per calendar day.)

Table 17-18. Content Tab Fields and Descriptions

Field	Description
Using Data Source	Identify the data source: Click **Projects** and then, from the drop-down menu, select one or all projects defined for your company. Click **Workgroups** and then, from the drop-down menu, select one or all workgroups defined for your company. Click **Users** and then, from the drop-down menu, select one or all agents, supervisors, and administrators defined for your company.

6. Click the **Layout** tab. The Layout tab of the ***Workgroup Interval Time by Media Report*** (Figure 17-16) appear.

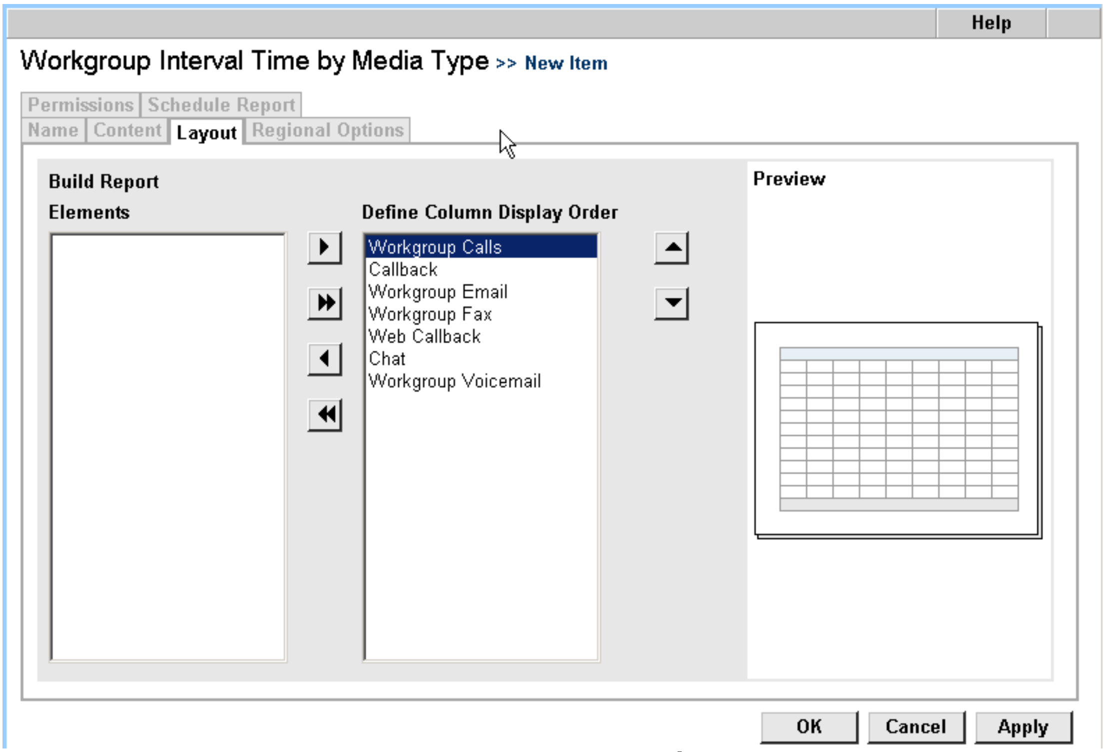


Figure 17-16 Layout Tab

7. Using the information in Table 17-19, complete fields.

Table 17-19. Layout Tab Fields and Descriptions

Field	Description
Build Report	Identify the elements to include in the report: • Click an item and then click the left arrow ( ) or or • Click the double-left arrow ( ) to include all elements. Arrange the order of the report columns: • Click an element and then click the up arrow ( ) to move it up or • Click the down arrow ( ) to move it down.

8. Click the **Regional Options** tab. The Regional Options tab of the ***Workgroup Interval Time by Media Report*** (Figure 17-17) appears.

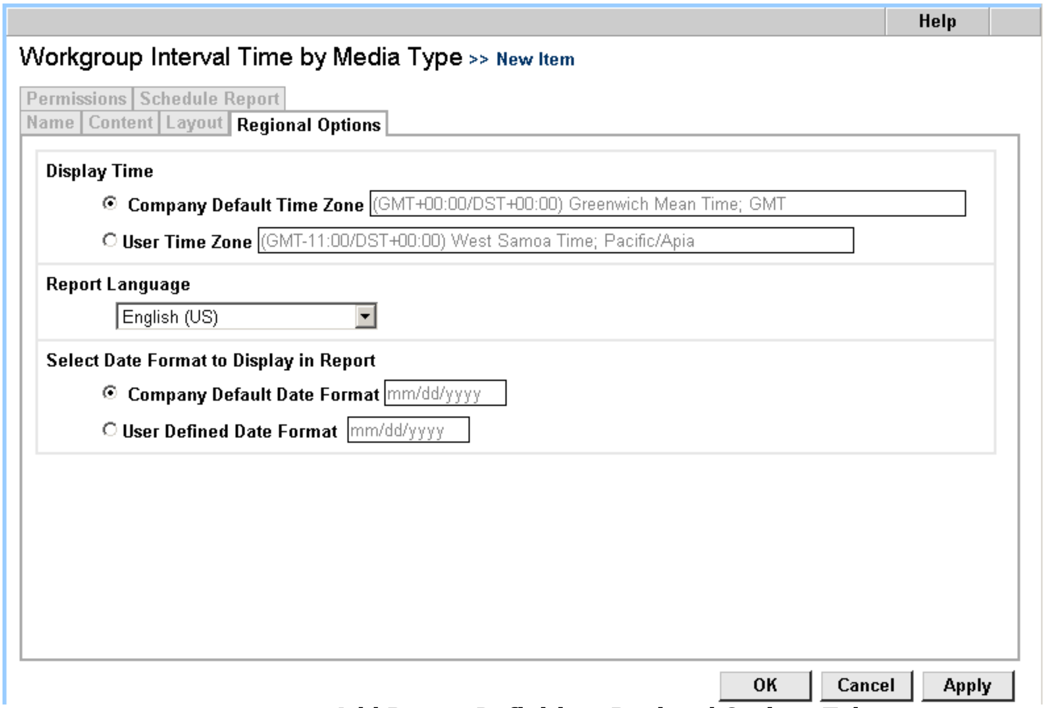


Figure 17-17 Add Report Definition: Regional Options Tab

9. Using the information in Table 17-20, complete the Regional Options tab.

Table 17-20. Regional Options Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language you choose.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

10. Click **Permissions**. The Permissions tab of the ***Workgroup Interval Time by Media Type*** report (Figure 17-18) appears.

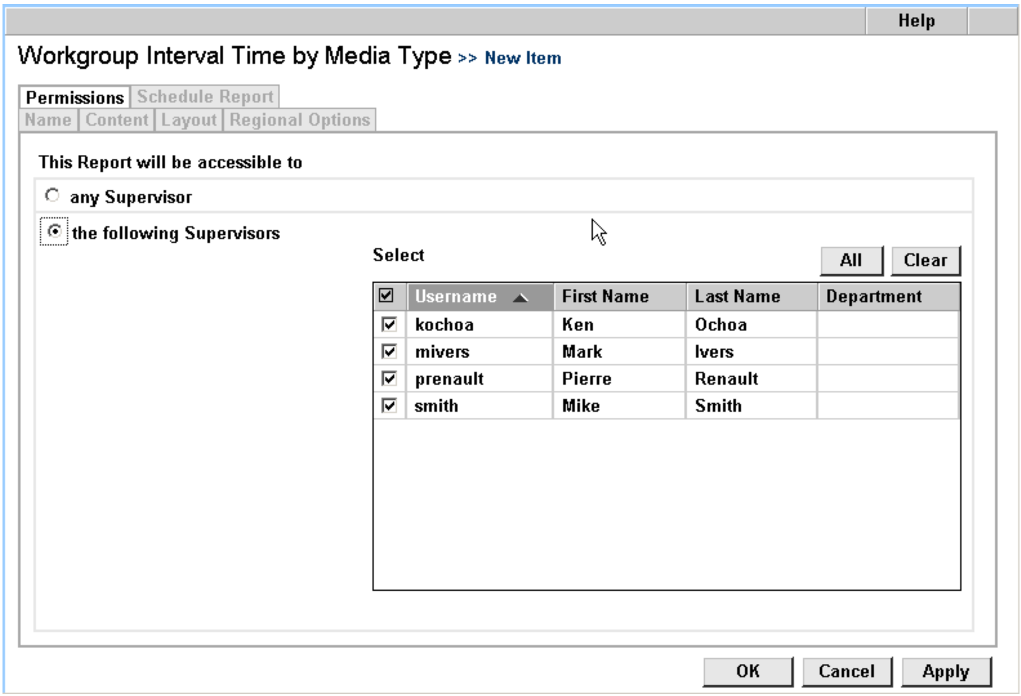


Figure 17-18 Add Report Definition: Permissions Tab

11. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors will not see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

12. Click **OK**.

    CCA saves the report in the database for access by any Adm or Supervisor who is logged into the company and to whom you have given permission to access the report.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - Also, since selecting a Start and End time for this report is slightly different than other reports, see “A Note About Start and End Times” on page 15-10.

    - For how to delete a report, see “To delete a report” on page 15-14.

Outcome Statistics Report

The Outcome Statistics Report (Figure 17-19) tracks the results of interactions based on interaction type (workgroup call, Web callback, and so on). For each interaction type, the Outcome Statistics Report shows the number of interactions that were assigned that outcome by agents at the conclusion of the interaction.

Outcome Statistic Report >> Report for 05/10/04 — from 05/10/2004 at 00:00:00 to 05/10/2004 at 23:59:00

Report Includes Agent: admin, admin

Outcome	Workgroup Email	Workgroup Fax	Chat	Workgroup Calls	Web Callback	Outbound	Inbound	Preview	Predictive	Callback	Workgroup Voicemail	Total
Order Pending												

Report Includes Agent: admin, admin

Outcome	Workgroup Email	Workgroup Fax	Chat	Workgroup Calls	Web Callback	Outbound	Inbound	Preview	Predictive	Callback	Workgroup Voicemail	Total
Order Placed												

Report Includes Agent: admin, admin

Outcome	Workgroup Email	Workgroup Fax	Chat	Workgroup Calls	Web Callback	Outbound	Inbound	Preview	Predictive	Callback	Workgroup Voicemail	Total
Other												

Report Includes Agent: admin, admin

Outcome	Workgroup Email	Workgroup Fax	Chat	Workgroup Calls	Web Callback	Outbound	Inbound	Preview	Predictive	Callback	Workgroup Voicemail	Total
Unsatisfied Customer -Personal Callback Requested												

Generated on 05/10/2004 at 07:01:59 PM — (GMT+00:00/DST+00:00) Greenwich Mean Time; GMT

Figure 17-19 Outcome Statistics Report

Each Outcome defined for the call center appears in each report group. The number of interactions receiving that outcome appears in each column (one interaction type per column).

Report Elements

Each data group of the Outcome Statistics Report is dedicated to a single interaction outcome, while the columns of the report detail the number of interactions to receive that outcome.

Table 17-21 describes the contents of each column of the Outcome Statistics Report.

Table 17-21. Outcome Report Interaction Types

Interaction Type	Description
Workgroup Emails	Email interactions
Workgroup Fax	Fax interactions
Chat	Chat interactions
Workgroup Calls	Inbound telephone interactions routed to a workgroup agent. **Note**: This number includes ACD callback requests, but does not include calls routed to voicemail.
Web Callback	Web callback interactions
Outbound	Outbound calls dialed through the CCA system. **Note**: This number does not include outbound calls made by agents on telephone lines not controlled by CCA.
Inbound	Inbound calls routed directly to an agent's extension. **Note**: This number does not include calls routed through the ACD Server to an available workgroup agent.
Preview	Preview interactions
Predictive	Predictive interactions
Callback	Callback interactions.
Workgroup Voicemail	Voicemails that were left for the workgroup.

To create an Outcome Statistics Report

1. Click **Reports** > **Workgroup Productivity** > **Outcome Statistics** > the **Add** button.

   The Add Outcome Statistics screen opens to the Name tab (Figure 17-10).

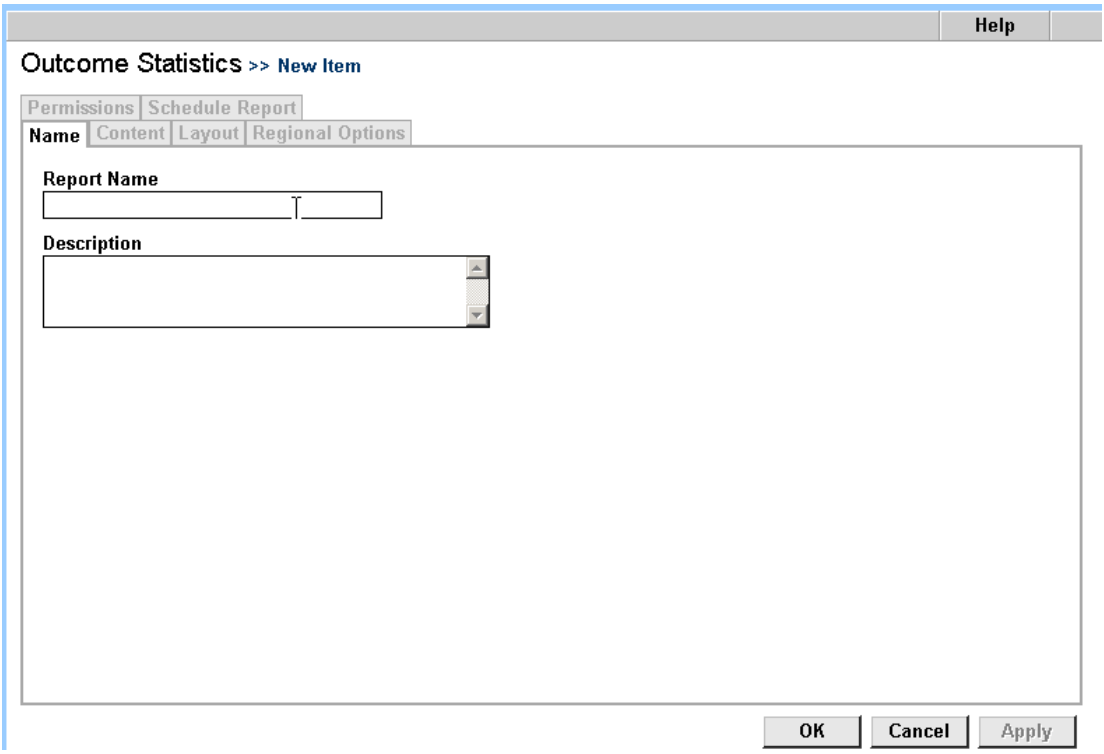


Figure 17-20 Add Report Definition: Name Tab

2. Using the information in Table 17-22, complete the fields.

Table 17-22. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Outcome Statistics Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Outcome Statistics Report definitions.

3. Click **Content**. The Content tab (Figure 17-21) of the ***Outcome Statistics*** report appears.

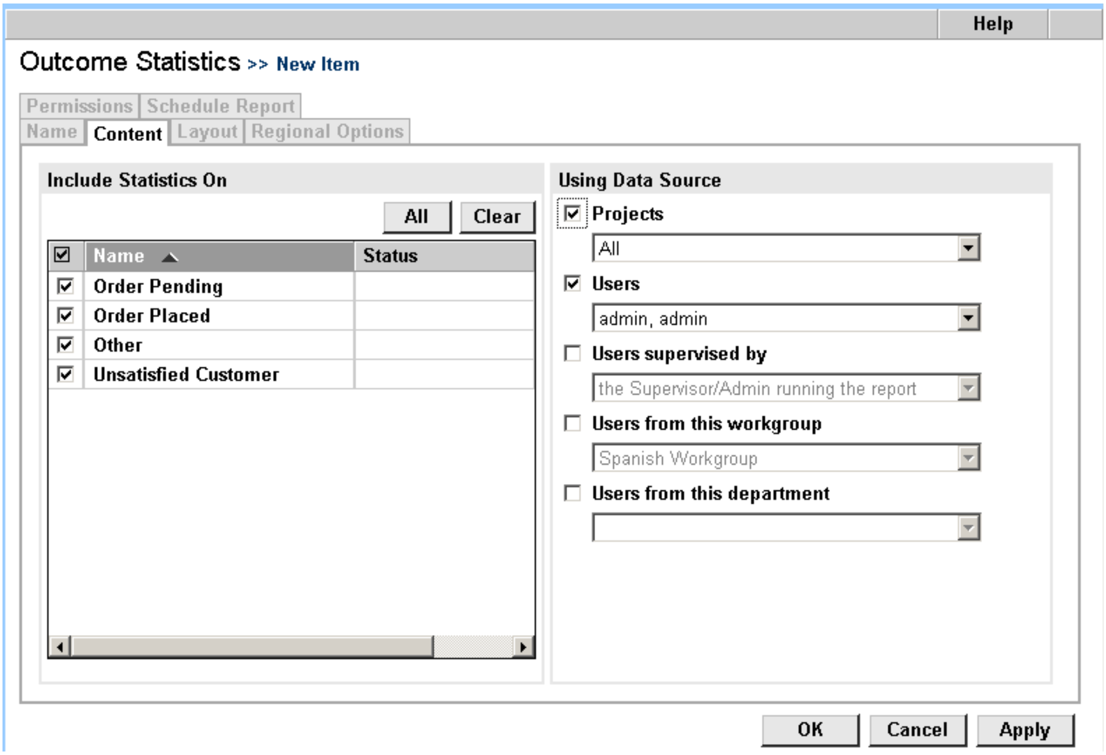


Figure 17-21 Outcome Statistics Report: Content Tab

4. Using the information in Table 17-23, complete the fields.

Table 17-23. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	In the **Include Statistics On** area, check the outcomes to include in the report. Click **All** to include all elements or click **Clear** to clear all the check boxes.

Table 17-23. Content Tab Fields and Descriptions

Field	Description
Using Data Source	Click the data group for the report: • **Projects:** Choose from all projects defined for the company • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup:** Report on users in a specific workgroup. • **Users from this department:** Report on selected departments.

5. Click **Layout**. The Layout screen (Figure 17-22) appears.

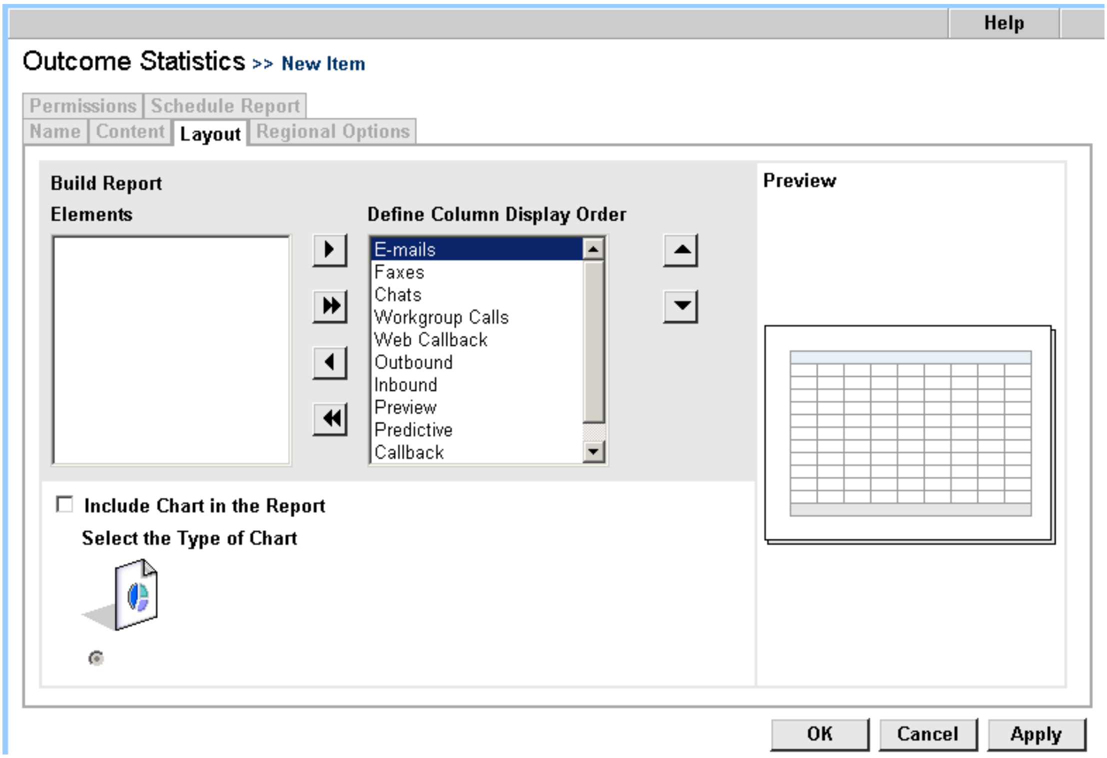


Figure 17-22 Outcome Statistics Report: Layout Tab

6. Using the information in Table 17-24, complete the fields.

Table 17-24. Layout Tab Fields and Descriptions

Field	Description
Build Report	In the **Elements** box, click an element to include in the report and then click (or just click to include all elements). Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down.
Include Chart in the Report	Check **Include Chart in the Report** to include a graphical representation of the report information in the generated report. Verify the report layout in the **Preview** area.

7. Click **Regional Options**. The Regional Options tab (Figure 17-23) of the ***Outcome Statistics Report*** appears.

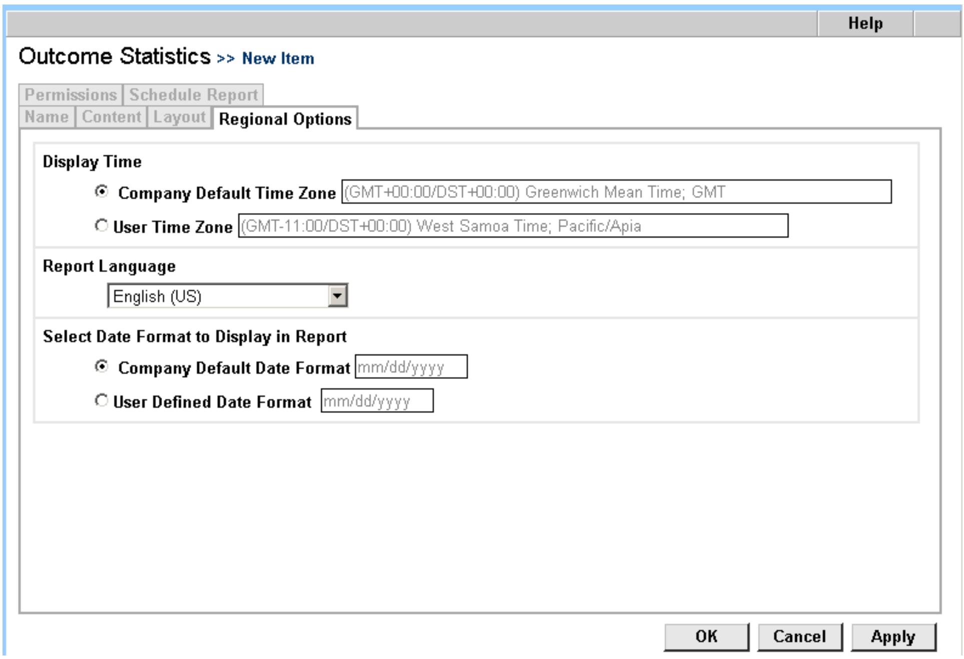


Figure 17-23 Add Report Definition: Regional Options Tab

8. Using the information in Table 17-25Complete the **Regional Options** tab.

Table 17-25. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 17-24) of the ***Outcome Statistics Report*** appears.

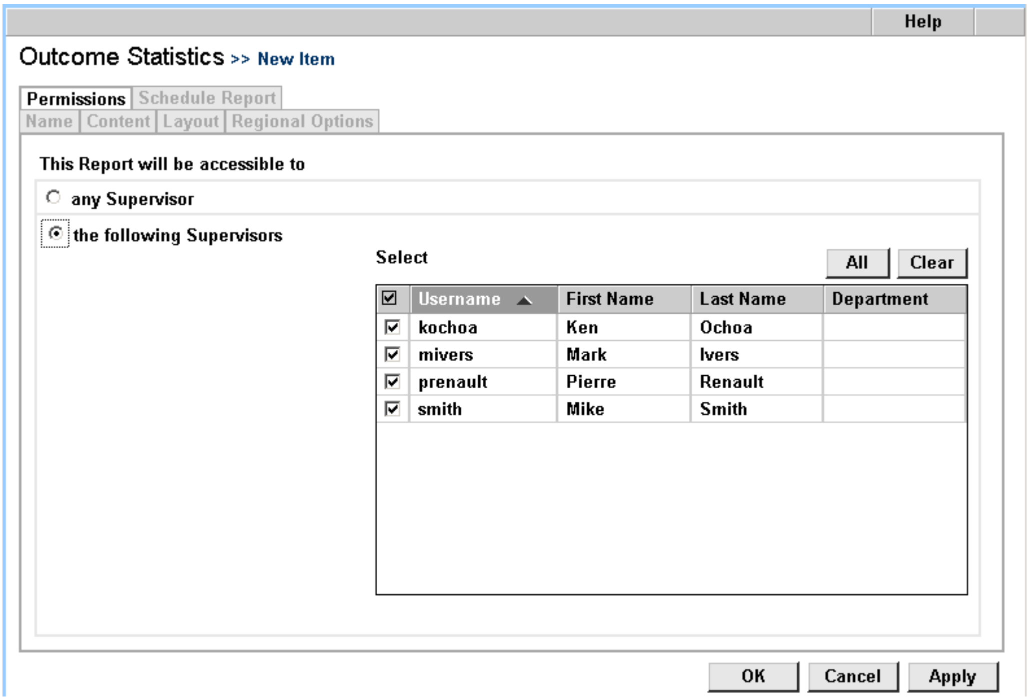


Figure 17-24 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

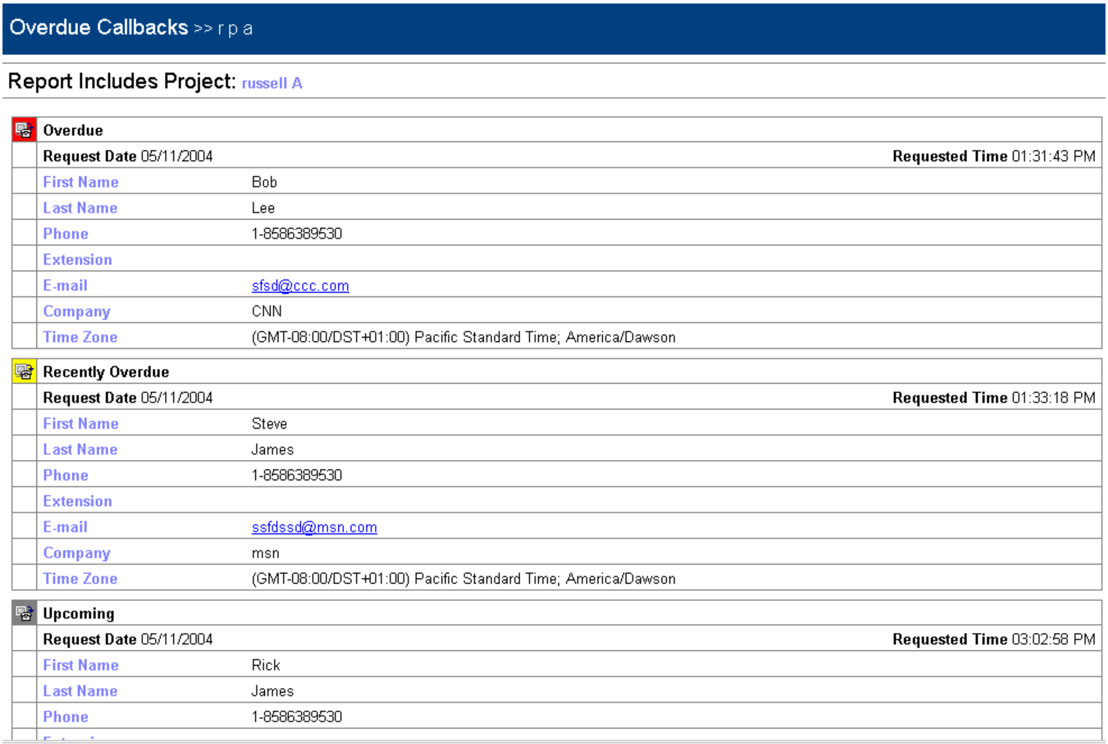
11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Overdue Callbacks Report

The ***Overdue Callbacks Report*** (Figure 17-25) lists all waiting Web callback interactions. Based on your overdue criteria and the date and time for which the customer scheduled the callback, this report identifies whether interactions are overdue, recently overdue, or upcoming.



Overdue Callbacks >> r p a

Report Includes Project: russell A

Overdue		
Request Date 05/11/2004		**Requested Time** 01:31:43 PM
First Name	Bob	
Last Name	Lee	
Phone	1-8586389530	
Extension		
E-mail	sfsd@ccc.com	
Company	CNN	
Time Zone	(GMT-08:00/DST+01:00) Pacific Standard Time; America/Dawson	
Recently Overdue		
Request Date 05/11/2004		**Requested Time** 01:33:18 PM
First Name	Steve	
Last Name	James	
Phone	1-8586389530	
Extension		
E-mail	ssfdssd@msn.com	
Company	msn	
Time Zone	(GMT-08:00/DST+01:00) Pacific Standard Time; America/Dawson	
Upcoming		
Request Date 05/11/2004		**Requested Time** 03:02:58 PM
First Name	Rick	
Last Name	James	
Phone	1-8586389530	

Figure 17-25 Overdue Callbacks Report

Report Elements

Each unhandled Web callback interaction listed in the ***Overdue Callbacks Report*** shows the date and time the customer requested the callback, as well as the contact information provided by the customer.

The report places each interaction into one of the following groups:

Table 17-26. Overdue Callbacks Report Groups

Group	Description
Overdue	The specified **Overdue Threshold** time elapsed since the time for which the customer requested the callback.
Recently Overdue	The time for which the customer requested the callback passed, but your specified **Overdue Threshold** time has not yet elapsed.
Upcoming	The time for which the customer requested the callback has not yet arrived.

Creating an Overdue Callbacks Report

1. Click **Reports** > **Workgroup Productivity** > **Overdue Callbacks** > the **Add** button. The Add Overdue Callbacks screen opens to the Name tab (Figure 17-26).

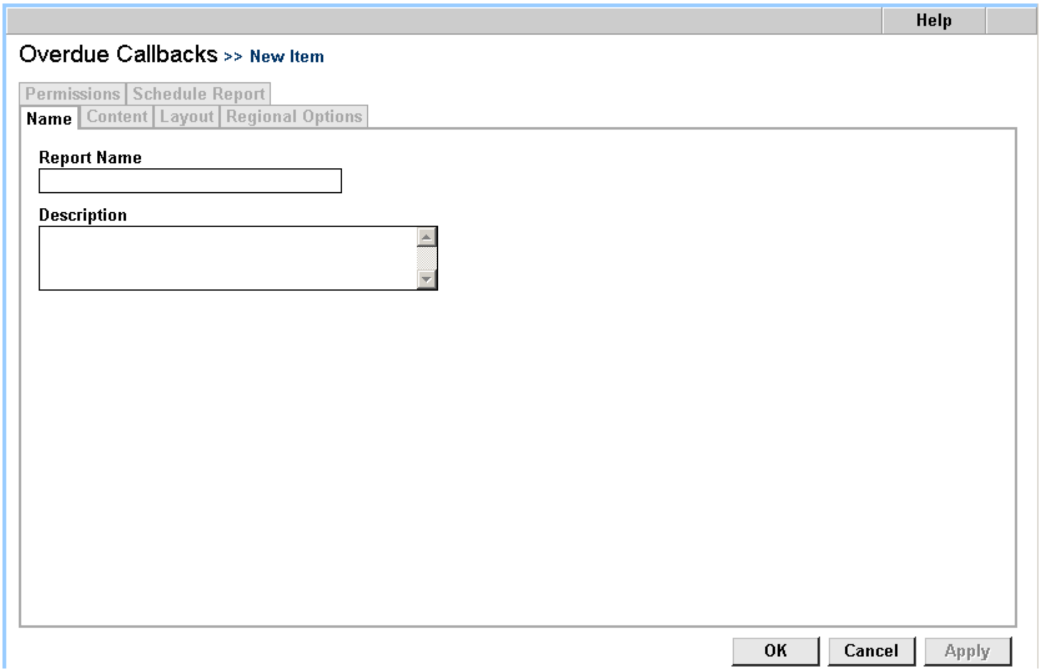


Figure 17-26 Add Report Definition: Name Tab

2. Using the information in Table 17-27, complete the fields.

Table 17-27. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Overdue Callbacks Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Overdue Callbacks Report definitions.

3. Click **Content**. The Content tab (Figure 17-27) of the Overdue Callbacks screen appears.

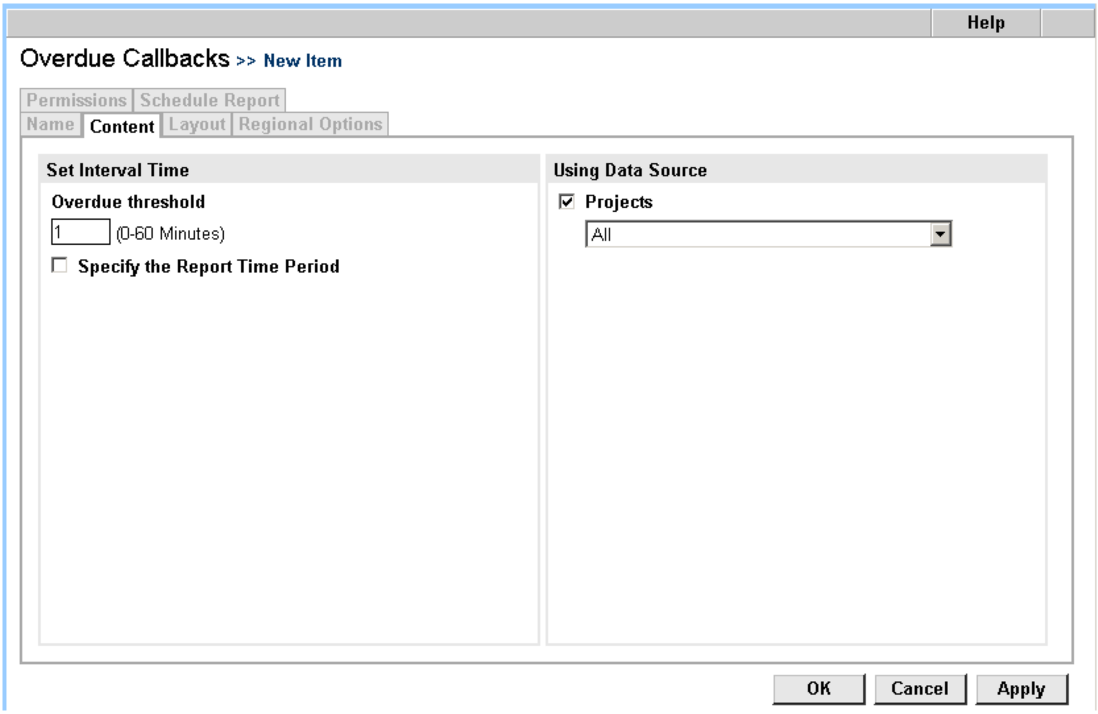


Figure 17-27 Overdue Callbacks Report: Content Tab

4. Using the information in Table 17-28, complete the field.

Table 17-28. Content Tab Fields and Descriptions

Field	Description
Overdue Threshold	Type the number of minutes after which CCA reports all unhandled Web callback interactions as overdue. For example, enter a value of 30 minutes. If the customer requested the callback for noon, CCA reports the interaction as “Recently Overdue” at 12:29 p.m. and as “Overdue” at 12:31 p.m.
Specify the Report Time Period	Check to allow the supervisor or administrator generating the report to specify a report date range. Clear this box to report on all unhandled Web callback interactions.
Using Data Source	From the drop-down menu, select one or all of the projects.

5. Click **Layout**. The Layout tab (Figure 17-28) of the Overdue Callback screen appears.

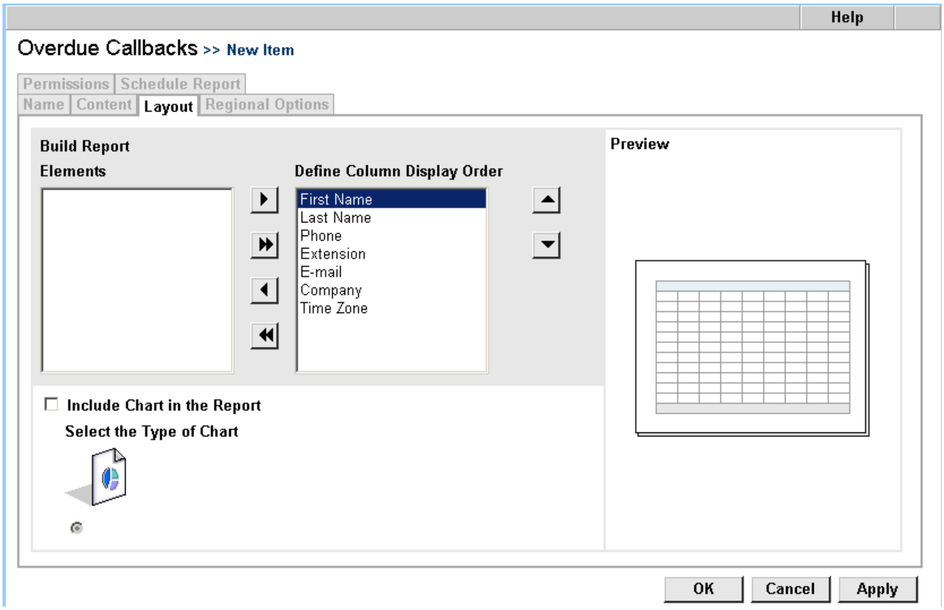


Figure 17-28 **Overdue Callbacks Report: Layout Tab**

6. Using the information in Table 17-29, complete the fields.

Table 17-29. Layout Tab Fields and Descriptions

Field	Description
Build Report	In the **Elements** box, click an item to include in the report and then click an arrow ( ), or just click the double arrow ( ) to include all elements. Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or click the down arrow ( ) to move the column down.
Include Chart in the Report	Check **Include Chart in the Report** to include a graphical representation of the report information in the generated report. Verify the report layout in the **Preview** area.

7. Click **Regional Options**. The Regional Options tab (Figure 17-29) of the Overdue Callbacks screen appears.

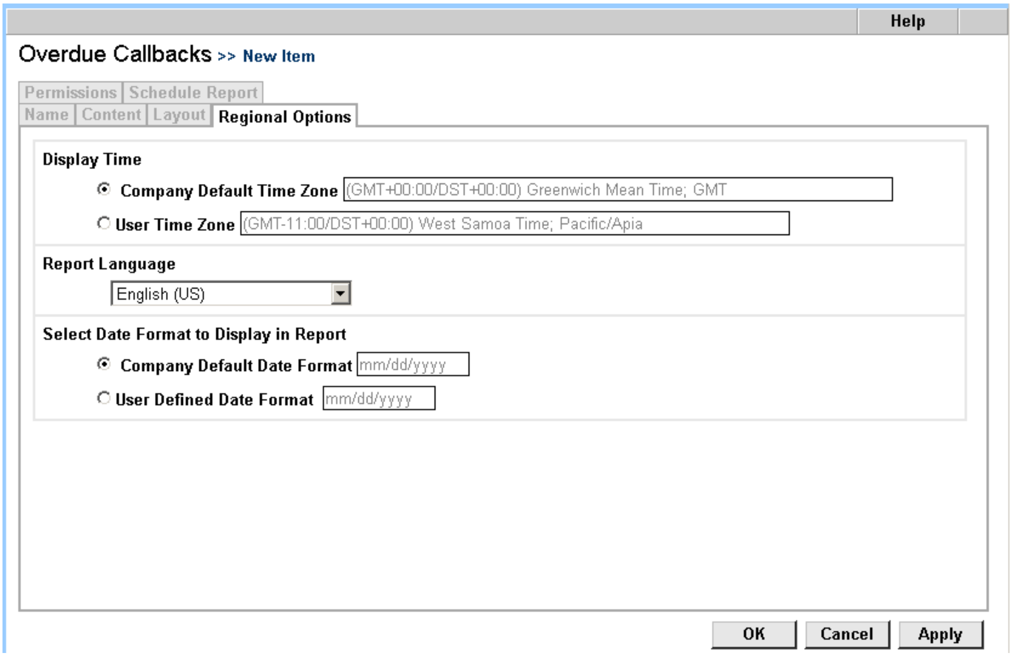


Figure 17-29 Add Report Definition: Regional Options Tab

8. Using the information in Table 17-30, complete the fields.

Table 17-30. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permission tab (Figure 17-30) of the Overdue Callbacks screen appears.

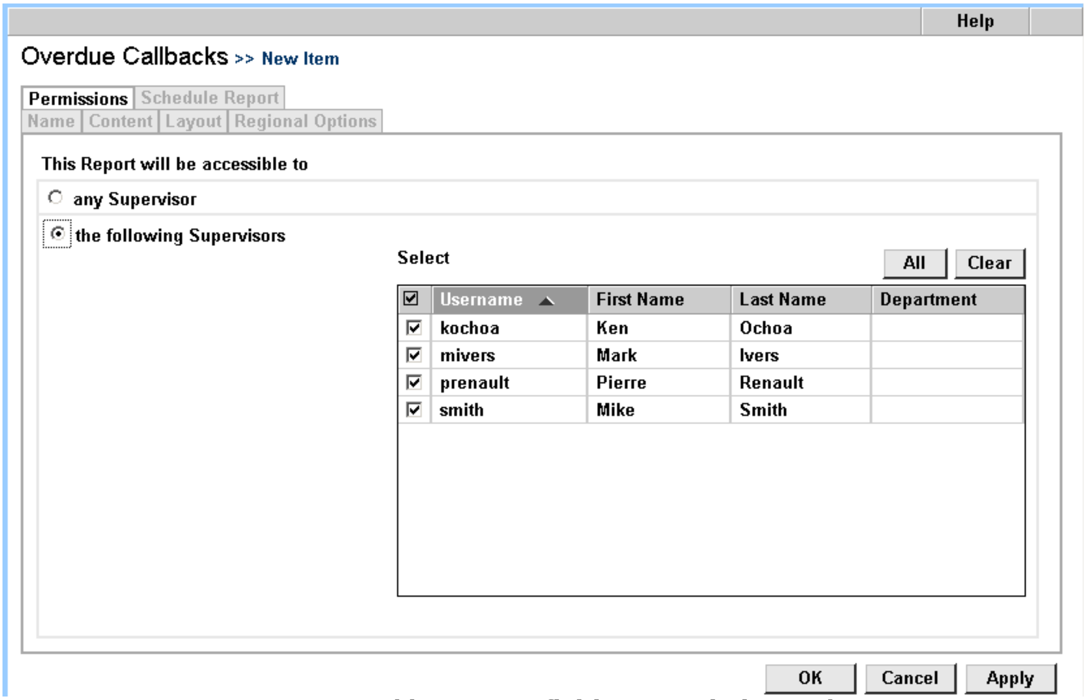


Figure 17-30 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

18

The Predictive Reports

Predictive Dialer Totals Report

The ***Predictive Dialer Totals Report*** (Figure 18-1) shows a group of call-related statistics (number of calls, answer rate, and so on) for predictive dialing.

Predictive Dialer Totals Report >> SDCC West

from 03/08/2004 at 09:00:00
to 03/08/2004 at 09:05:00

Report Includes All Projects, : admin, admin, Arden, Phillip, Aviara, Raymond, Floria, Andrea, Ganneti, Stephan, Jones, Mike, Prosen, Bill, Smith, Steve

Project Name	Time	Number of Calls	Number of Active Calls	Abandon Rate	Answer Rate	Average Waiting Time	Number of Calls per Hour	Number of Calls per Agent	Dialer Ratio
SDCC West - Technical Support	03/08/2004 - 09:00:50 AM	0	0	0	0	0	0	0	1.0
SDCC West - Technical Support	03/08/2004 - 09:02:00 AM	0	0	0	0	0	0	0	1.0
SDCC West - Technical Support	03/08/2004 - 09:03:10 AM	0	0	0	0	0	0	0	1.0
SDCC West - Technical Support	03/08/2004 - 09:04:20 AM	0	0	0	0	0	0	0	1.0

Generated on 03/08/2004 at 09:45:34 PM

(GMT+00:00/DST+00:00) Greenwich Mean Time; GMT

Figure 18-1 Sample Predictive Dialer Totals Report

Report Elements

Table 18-1 shows the Predictive Dialer Totals Report items and their descriptions.

Table 18-1. Predictive Dialer Totals Report Fields and Descriptions

Item	Description
Project Name	The name of the Project(s) you selected for the report.
Time	Each row in the report shows the statistics for one minute of predictive dialing. For example, if you chose a report start time of 9:00 am, and a report end time of 5:00 pm (View dialog > Period Covered tab), your report will have 480 rows for each project that you selected (Edit > Projects tab).
Number of Calls	The number of predictive dialing calls that were made since the dialing started. This number is cumulative for as long as the predictive project is runs. If you stop the project, the number of calls resets to 0.
Number of Active Calls	This field shows the number of calls that were "active" in the system during the reporting interval. A call is considered "active" when the system begins dialing that number. A call is considered "inactive" when a customer or agent hangs up or when the system hangs up. For example, if the project is in the 5th minute of running, the total number of calls made (Number of Calls) might be 50. However, during the 5th minute, only 15 calls might be active.
Dropped Rate	A dropped call occurs when the system hangs up on the customer before connecting the customer to an agent (because of system shutdown, no available agents, and so on). The Dropped Rate is defined as: $\dfrac{\text{Total number of calls dropped}}{\text{Total number of calls answered by a customer}}$ This field is cumulative.

Table 18-1. Predictive Dialer Totals Report Fields and Descriptions

Item	Description
Answer Rate	The Answer Rate is defined as: $$\frac{\text{Total number of calls answered by a customer}}{\text{Total number of calls made}}$$ This field is cumulative.
Average Waiting Time	Wait time is the amount time that an agent was available but was not given a call. The Average Wait Time is the average amount of time that all agents in the project spent waiting to be given a call since predictive dialing began. This field is cumulative. To be considered "waiting" an agent must be 1. Available 2. Associated with a predictive project that is running. 3. Logged into predictive dialing.
Number of Calls Per Hour	The average number of calls made per hour. It is defined as: $$\left[\frac{\text{Total number of calls made}}{\text{Total dialing time}}\right] ¥ 60$$
Number of Calls Per Agent	The Number of Calls Per Agent is defined as: $$\frac{\text{Total number of calls}}{\text{Total number of times agents were available}}$$ This field is cumulative.
Dialer Ratio	Dialer ratio is the number of calls that are made simultaneously for an agent. The dialer ratio can either be "fixed" or "pacing."See the Dialer Ratio tab on page 10-20.

To create a Predictive Dialer Totals Report

1. Click **Reports** > **Predictive/Preview Reports** > **Predictive Dialer Totals** > the **Add** button.

   The Add Predictive Dialer Totals screen opens to the Name tab (Figure 18-2).

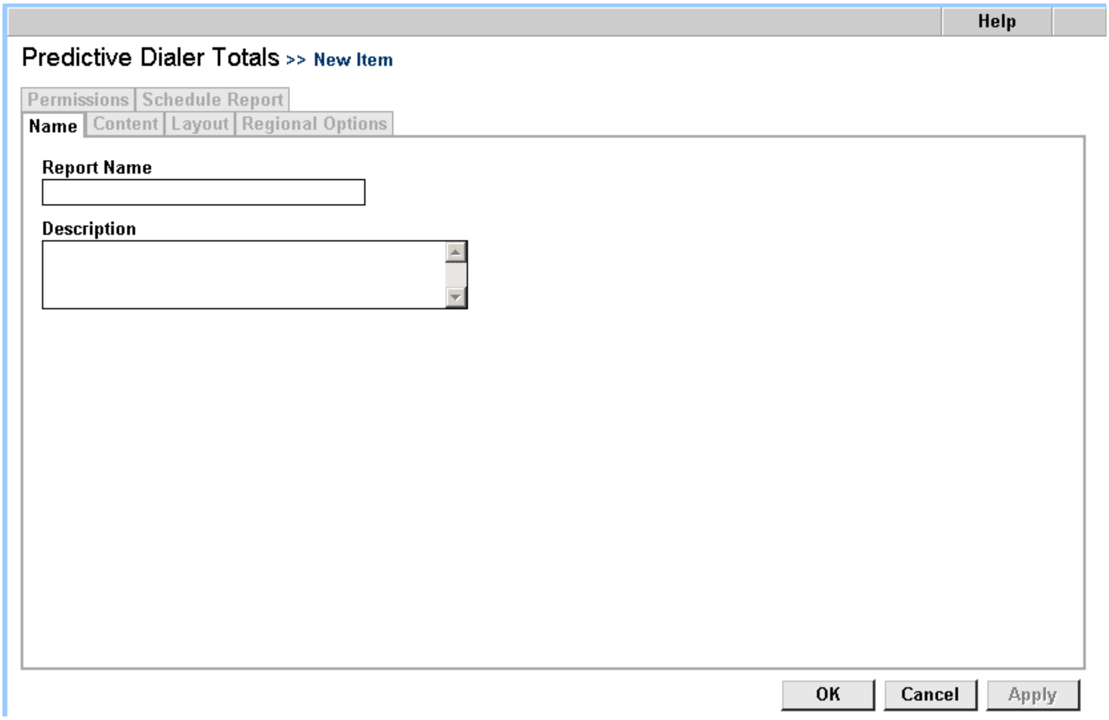


Figure 18-2 Add Report Definition: Name Tab

2. Type a **Report Name** and **Description** for the report.

Table 18-2. Name Tab Fields and Descriptions

Field	Description
Report Name	The report name appears on each page of the report and in the **Name** column of the list of Predictive Dialer Totals Report definitions.

Table 18-2. Name Tab Fields and Descriptions

Field	Description
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Predictive Dialer Totals Report definitions.

3. Click **Content**. The Content tab (Figure 18-3) of the Predictive Dialer Totals screen appears.

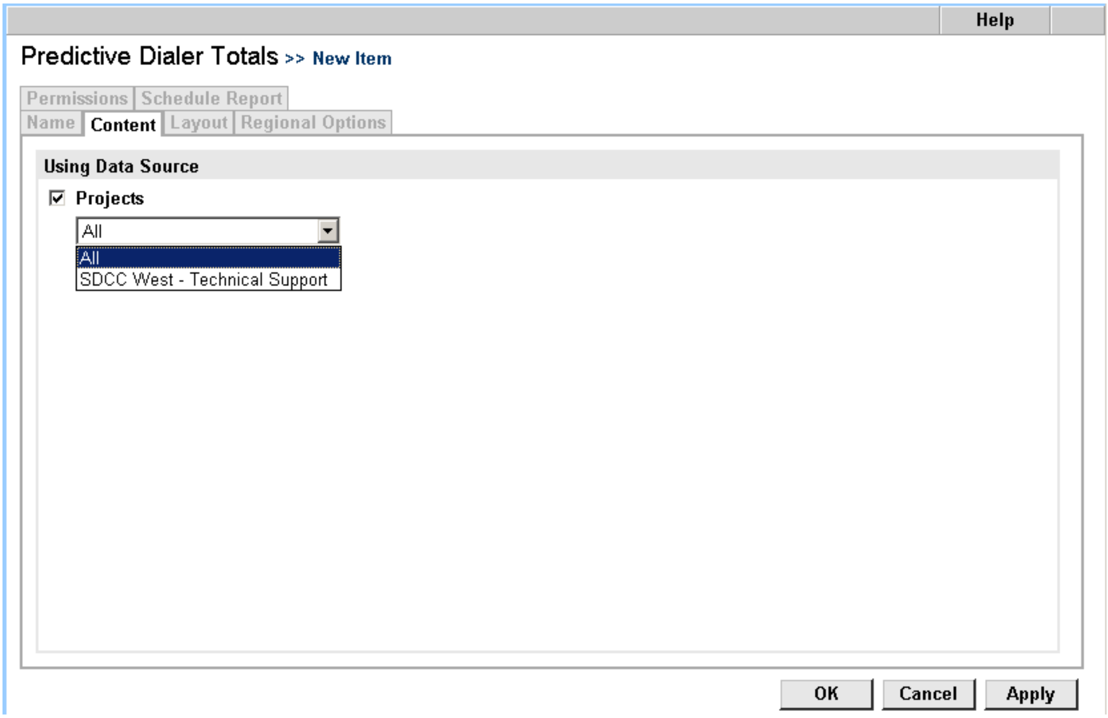


Figure 18-3 Predictive Dialer Totals Report: Content Tab

4. Complete the **Content** tab.

   Select one or all of your Projects.

5. Select **Layout**. The Layout tab (Figure 18-4) of the Predictive Dialer Totals screen appears.

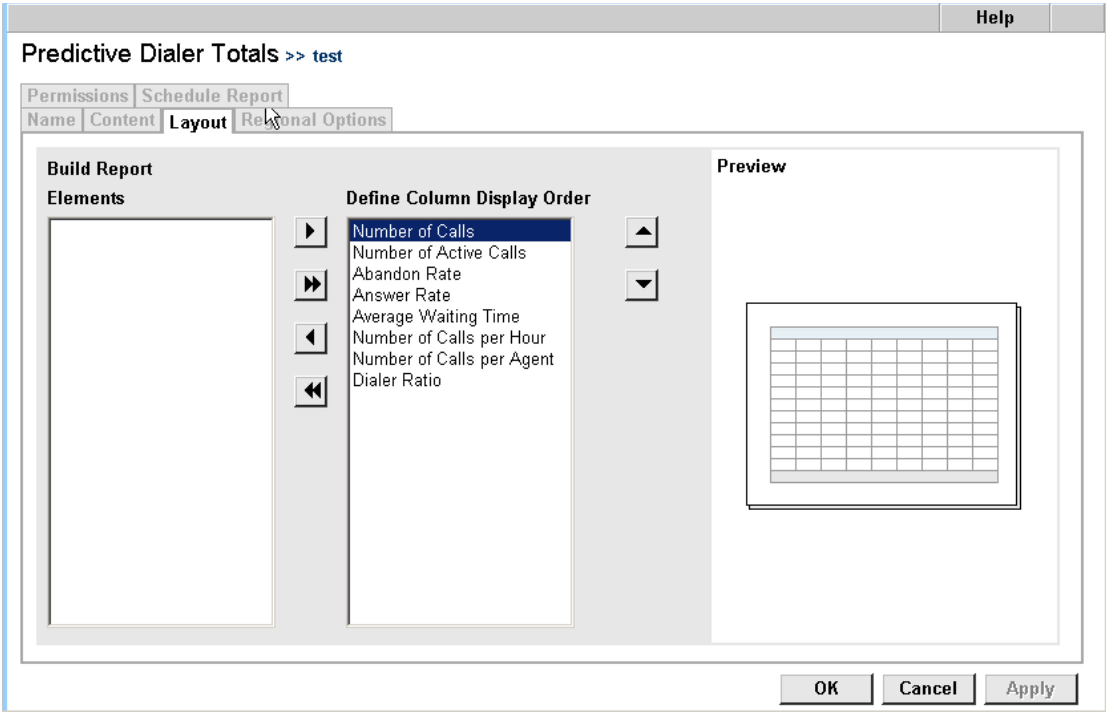


Figure 18-4 Predictive Dialer Totals Report: Layout Tab

6. Using the information in Table 18-3, complete the fields.

Table 18-3. Layout Tab Fields and Descriptions

Field	Description
Build Report	In the **Elements** box, check elements to include in the report and then click the right arrow ( ) or just click the double arrows ( ) to include all elements) Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or click the down arrow ( ) to move the column down.

7. Click **Regional Options**.The Regional Options tab (Figure 18-5) of the Predictive Dialer Totals screen appears.

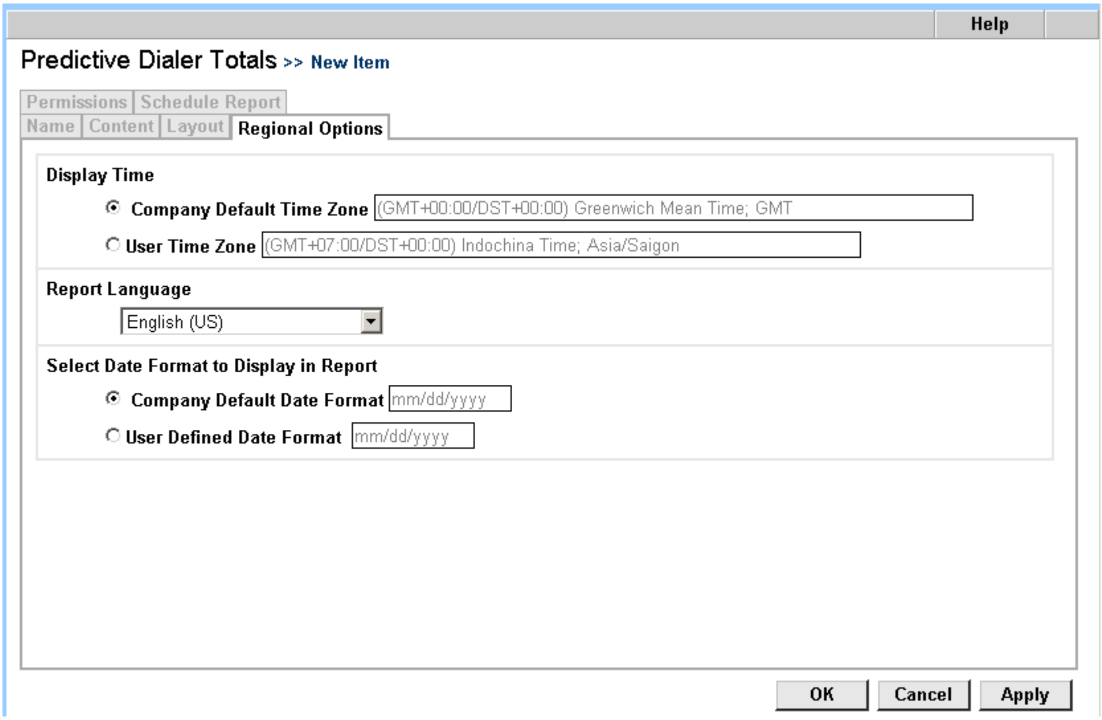


Figure 18-5 Add Report Definition: Regional Options Tab

8. Using the information in Table 18-4, complete the fields.

Table 18-4. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents are in the language selected.
Company Default Date Format	All dates are formatted using the format set for the company.
User Defined Date Format	All dates are formatted using the format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 18-16) of the Predictive Dialer Totals screen appears.

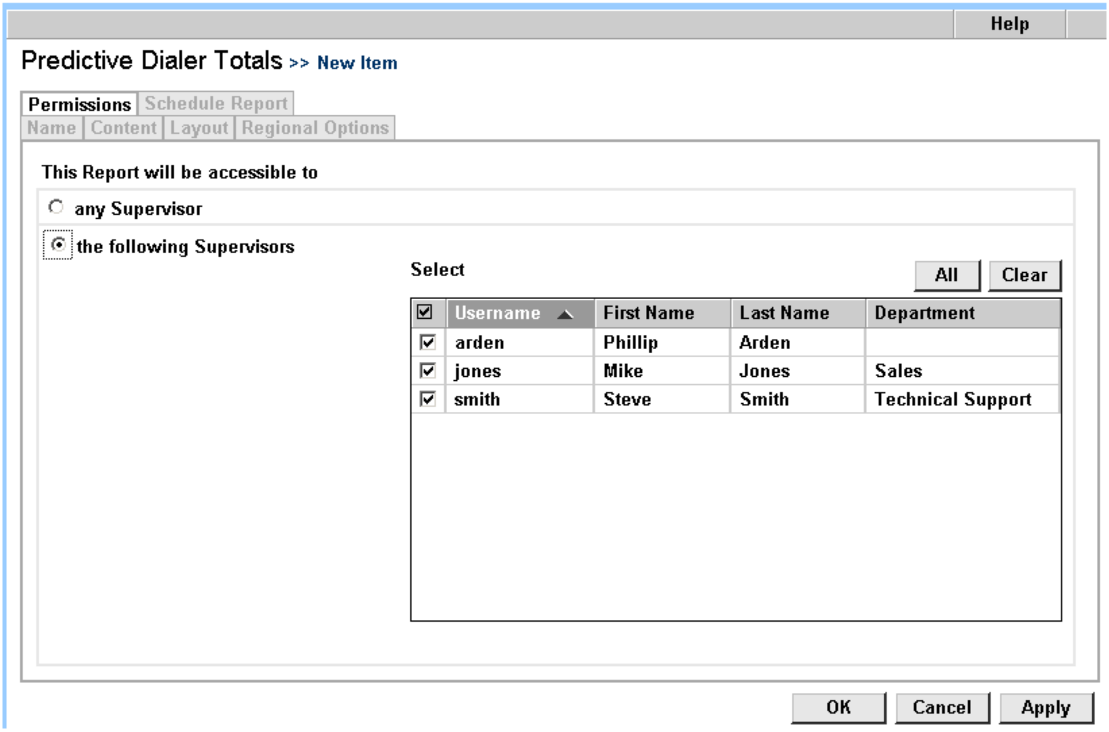


Figure 18-6 Add Report Definition: Permissions Tab

10. Click the **Any Supervisor** button to give all supervisors access to the report.

    or

    Click **The Following Supervisors** to select supervisors from a list.

11. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Predictive Productivity Report

The ***Predictive Productivity Report*** provides a snapshot of results for a specific Predictive Dialing Project.

Predictive Productivity >> Predictive Production

from 01.12.2002 at 00:00
to 17.12.2002 at 23:59

Report Includes All Projects

Talk Time	Login Duration	Agent Name	Talk Time Per Login Time	Calls Taken	Calls per Hour	Number of Sales	Close Sales Rate	Sales per Hour
00:49:20	304:55:34	Agent, Mike1	0.27 %	38	0.12	0	0.00 %	0.00
00:00:00	61:19:20	Agent, Mike2	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	05:05:25	levyA1, russellA1	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1001, user1001	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1002, user1002	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1003, user1003	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1004, user1004	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1005, user1005	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1006, user1006	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1007, user1007	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1008, user1008	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1009, user1009	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1010, user1010	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1011, user1011	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1012, user1012	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1013, user1013	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1014, user1014	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1015, user1015	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1016, user1016	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1017, user1017	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1018, user1018	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1019, user1019	0.00 %	0	0.00	0	0.00 %	0.00
00:00:00	00:00:00	user1020, user1020	0.00 %	0	0.00	0	0.00 %	0.00
00:49:20	371:20:19	**Number Of Agents: 23**	0.22 %	38	0.10	0	0.00 %	0.00

Generated on 17.12.2002 at 18:31

(GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 18-7 Predictive Productivity Report

Report Elements

Table 18-5 shows the ***Predictive Productivity Report*** columns and descriptions.

Table 18-5. Predictive Productivity Report Columns

Column	Description
Agent Name	The name of agent included in report.
Log in Duration	How long the agent was logged into the predictive campaign.
Talk Time	How long the agent spent in “Busy Status” during the predictive campaign.
Talk Time per Log In	The percentage of time the agent spent in “Busy Status” during predictive campaign.
Calls Taken	The number of calls taken during login.
Calls per Hour	The number of calls taken per hour (Number of Calls/Login Time)
Number of Sales	The number of sales.
Close Rate Sales	The percentage of sales against the number of calls taken during login.
Sales per Hour	The number of sales per hour (Number of Sales/Login Time).

To create a Predictive Productivity Report

1. Click **Reports** > **Predictive/Preview Reports** > **Predictive Productivity** > the **Add** button.

   The Predictive Productivity screen (Figure 18-8) opens to the Name tab.

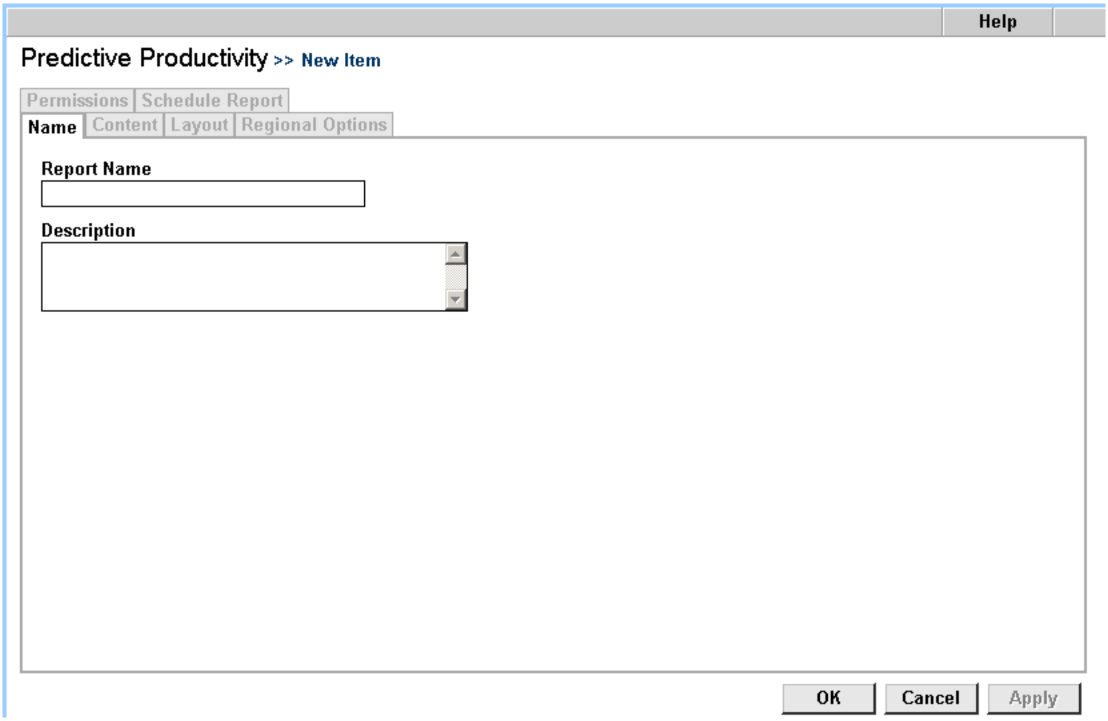


Figure 18-8 Add Report Definition: Name Tab

2. Using the information in Table 18-6, complete the fields.

Table 18-6. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Predictive Productivity Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Predictive Productivity Report definitions.

3. Click **Content**. The Content tab (Figure 18-9) of the Predictive Productivity screen appears.

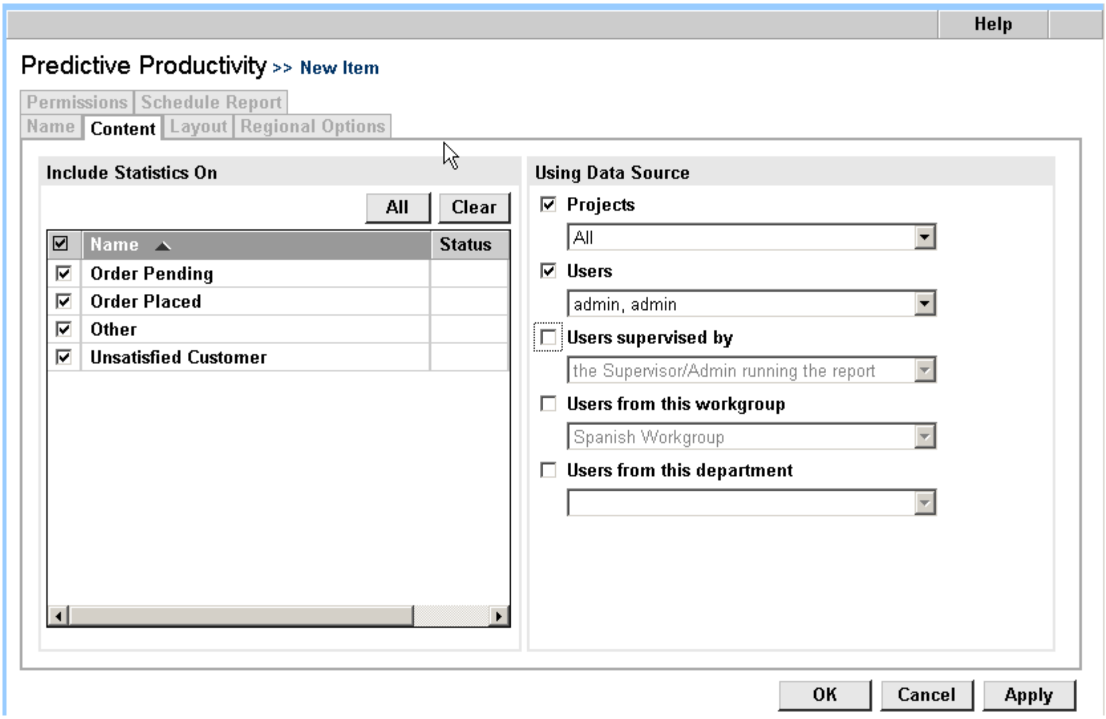


Figure 18-9 Predictive Productivity Report: Content Tab

4. Using the information in Table 18-7, complete the fields.

Table 18-7. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	In the **Include Statistics On** area, check the outcomes to include in the report. Click **All** to include all elements or click **Clear** to clear all the check boxes.

Table 18-7. Content Tab Fields and Descriptions

Field	Description
Using Data Source	Click the data group for the report: • **Projects**: Select from all projects defined for the company • **Users**: Choose agents, supervisors, and administrator accounts defined for the company • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 18-10) of the Predictive Productivity screen appears.

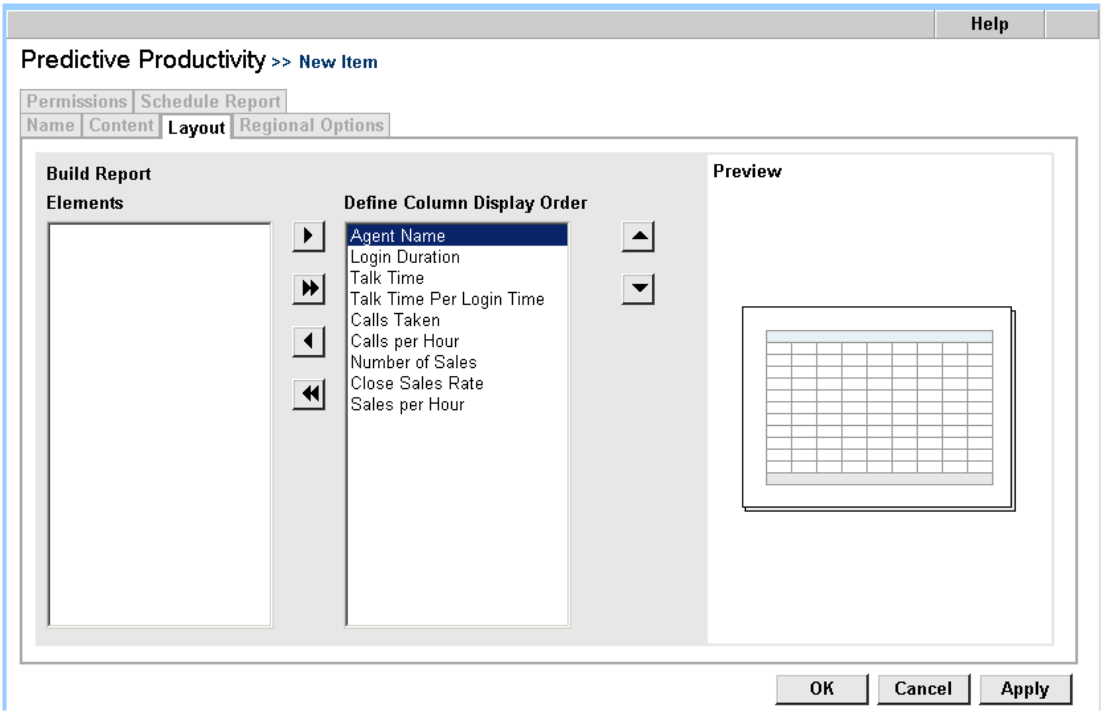


Figure 18-10 Predictive Productivity Report: Layout Tab

6. Using the information in Table 18-8, complete the fields.

Table 18-8. Layout Tab Fields and Descriptions

Field	Description
Build Report	In the **Elements** box, click elements to include in the report and then click the right arrow ( ) or just click the double-arrow ( ) to include all elements. Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down. The format of the report appears on the right hand side of the page.

7. Click **Regional Options**. The Regional Options tab (Figure 18-11) of the Predictive Productivity screen appears.

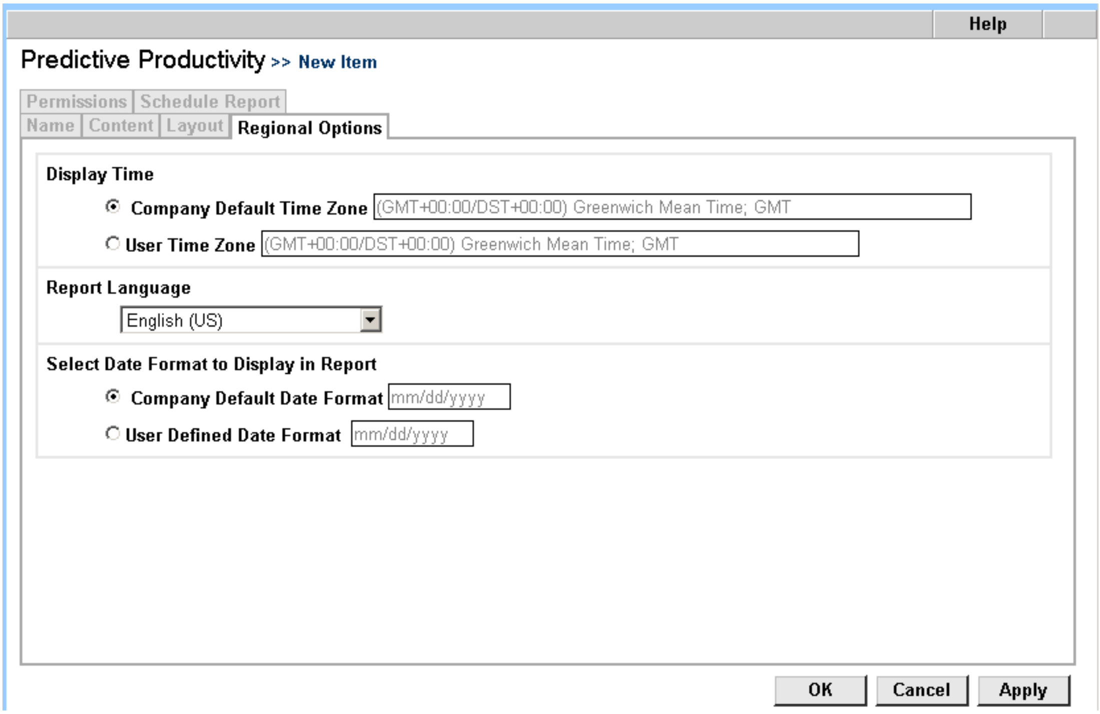


Figure 18-11 Add Report Definition: Regional Options Tab

8. Using the information in Table 18-9, complete the fields.

Table 18-9. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 18-12) of the Predictive Productivity screen appears.

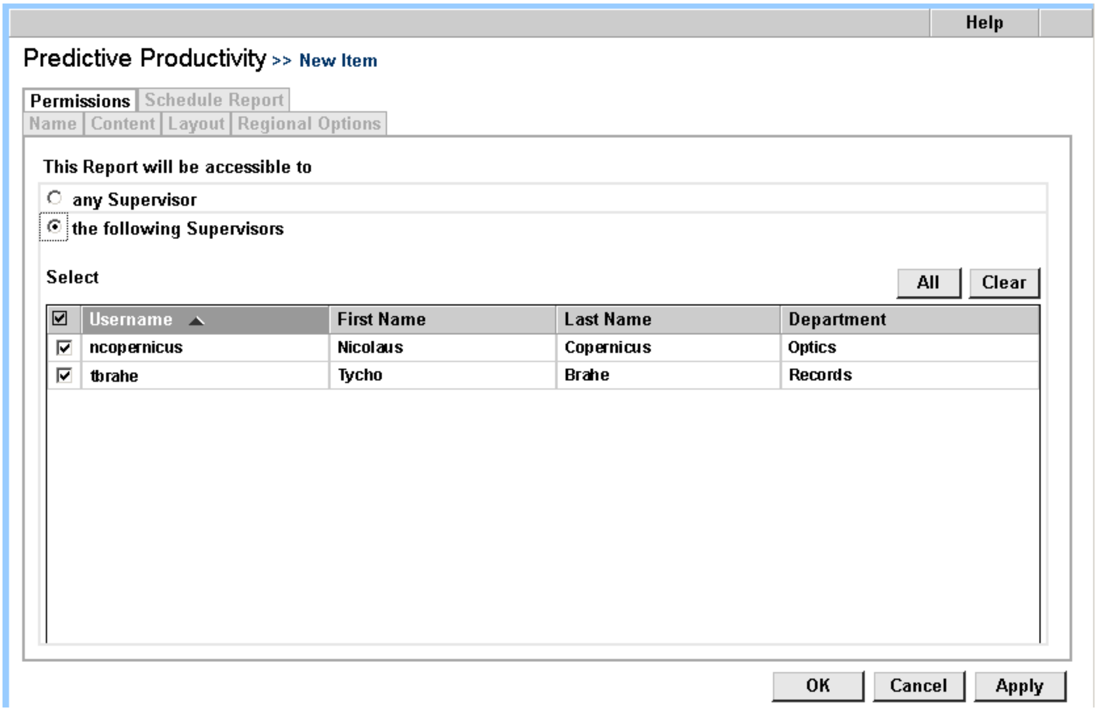


Figure 18-12 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Predictive Summary Report

The ***Predictive Summary Report (***Figure 18-13) lists the total occurrences of each possible Predictive Call result for the selected projects or workgroups.

Predictive Summary Report >> Predictive Summary — from 01.12.2002 at 00:00 to 17.12.2002 at 23:59

Report Includes All Projects

Results	Total	
Error	0	0.00%
Busy	7	9.33%
No Answer	27	36.00%
Fax	0	0.00%
Invalid	0	0.00%
Answer, Not Connected	0	0.00%
Answering Machine	19	25.33%
Answer	22	29.33%
Answering Machine, Not Connected	0	0.00%
Total	75	100.0%

Percentage of "Answer, Not Connected" to "Answer" = 0.00%

Percentage of "Answering Machine, Not Connected" to "Answer" = 0.00%

Generated on 17.12.2002 at 18:27 — (GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 18-13 Example Predictive Summary Report

Report Elements

The sample report in Figure 18-13 shows the results of some predictive dialing, but this report can also show statistics for actions and outcomes.

Refer to Table 18-10 for a description of the ***Predictive Summary Report*** columns.

Table 18-10. Predictive Summary Report Columns

Column	Description
Result	The result of the predictive call attempt can be: **Answer**: A person answered the predictive call. **Answer, Not Connected**: The predictive call was answered but the agent and the client were not connected. **Answering Machine**: An answering machine answered the predictive call. **Answering Machine, Not Connected:** The predictive call was answered but the agent and the answering machine were not connected. **Busy**: The predictive call resulted in a busy signal. **Error**: An error (no dial tone, no line available, and so on) prevented the predictive call from being placed. **Fax**: A fax machine answered the predictive call **Invalid**: The number used for the predictive call was out of service or not a valid number **No Answer**: There was no answer at the number dialed.
Action	The action taken as a result of the predictive call attempt can be: **Abandon before connect:** Call was abandon before connecting. **Call back**: Will call this number back at the specified time. **Call back message**: Left the specified message on the answering machine that answered the Predictive call and will call this number back at the specified time. **Call back message failed**: Failed to leave the specified message on the answering machine that answered the predictive call. **Call failed**: The predictive call failed. **Connect to agent**: The predictive call was connected with an agent. **Leave message**: Left the specified message on the answering machine that answered the predictive call. **Leave message failed**: Failed to leave the specified message on the answering machine that answered the predictive call. **Out of list:** The number was removed from the predictive database and will not be called again **Route to project:** The predictive call was answered then routed to a project. **Route to project failed:** The predictive call was answered but routing to the specified project failed.

Table 18-10. Predictive Summary Report Columns

Column	Description
	Send fax: Sent the specified fax to the fax machine that answered the predictive call. **Send fax failed**: An attempt to send a fax was unsuccessful
Outcomes	Outcomes are call results that are configured by the company Administrator and assigned to the predictive project.
Total	The total number of predictive call attempts receiving the result.

To create a Predictive Summary Report

1. Click **Reports** > **Predictive/Preview Reports** > **Predictive Summary** > the **Add** button. The Add Predictive Summary screen (Figure 18-14) opens to the Name tab.

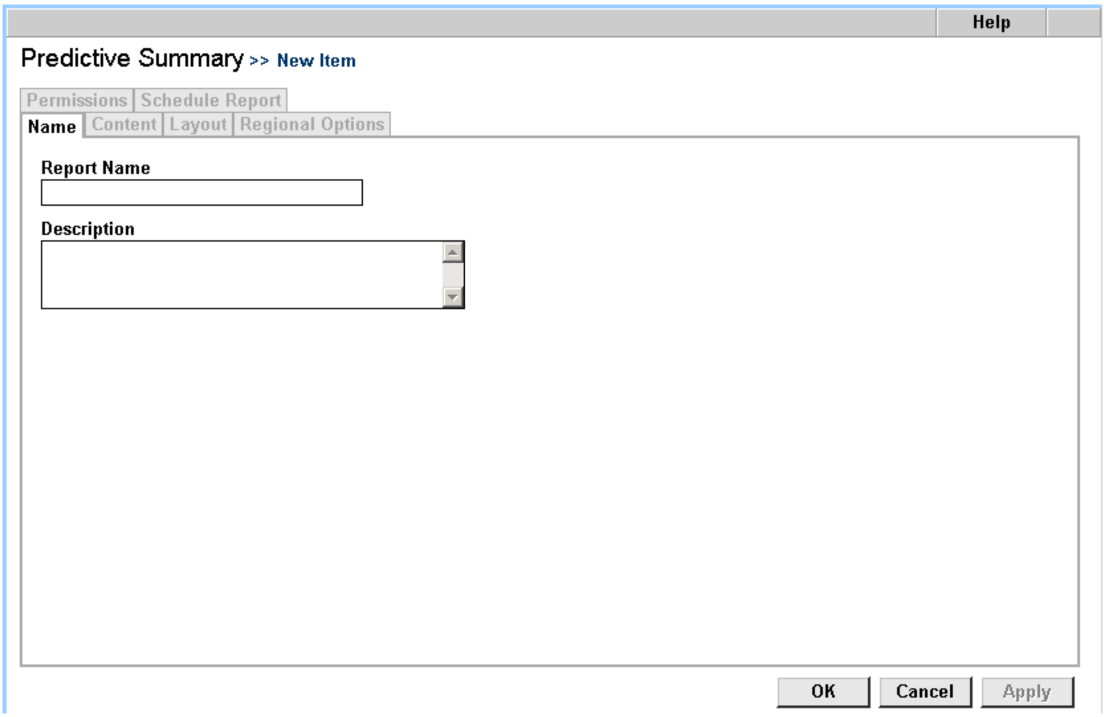


Figure 18-14 Add Report Definition: Name Tab

2. Using the information in Table 18-11, complete the fields.

Table 18-11. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Predictive Summary Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Predictive Summary Report definitions.

3. Click **Content**. The Content tab (Figure 18-15) of the Predictive Summary screen appears.

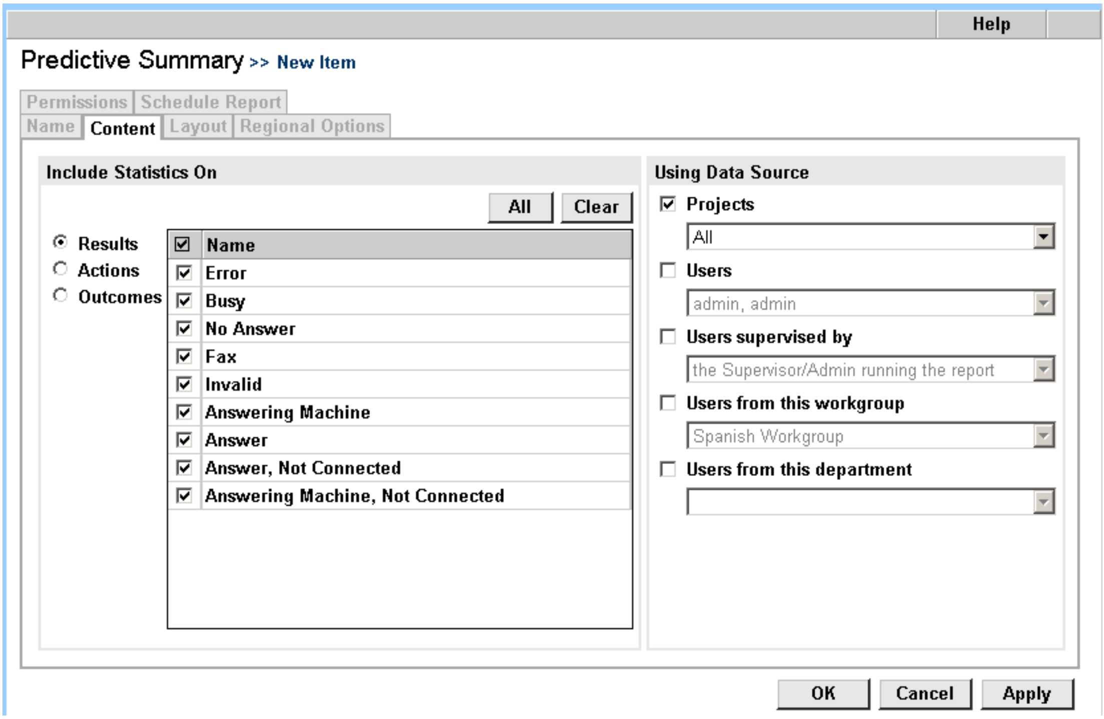


Figure 18-15 Predictive Summary Report: Content Tab

4. Using the information in Table 18-12, complete the fields.

Table 18-12. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Check the predictive summary to include in the report. See **Results** for a description of each of the possible Predict Result Types. See **Actions** for a description of each of the possible Action Types. See **Outcomes** for a description of the possible Outcomes types. Click **All** or **Clear** to check or clear, respectively, the specific Predictive Summary to include in the report.
Using Data Source	Click the data group source to report: • **Projects**: Choose from all projects defined for the company. • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 18-16) of the Predictive Summary screen appears.

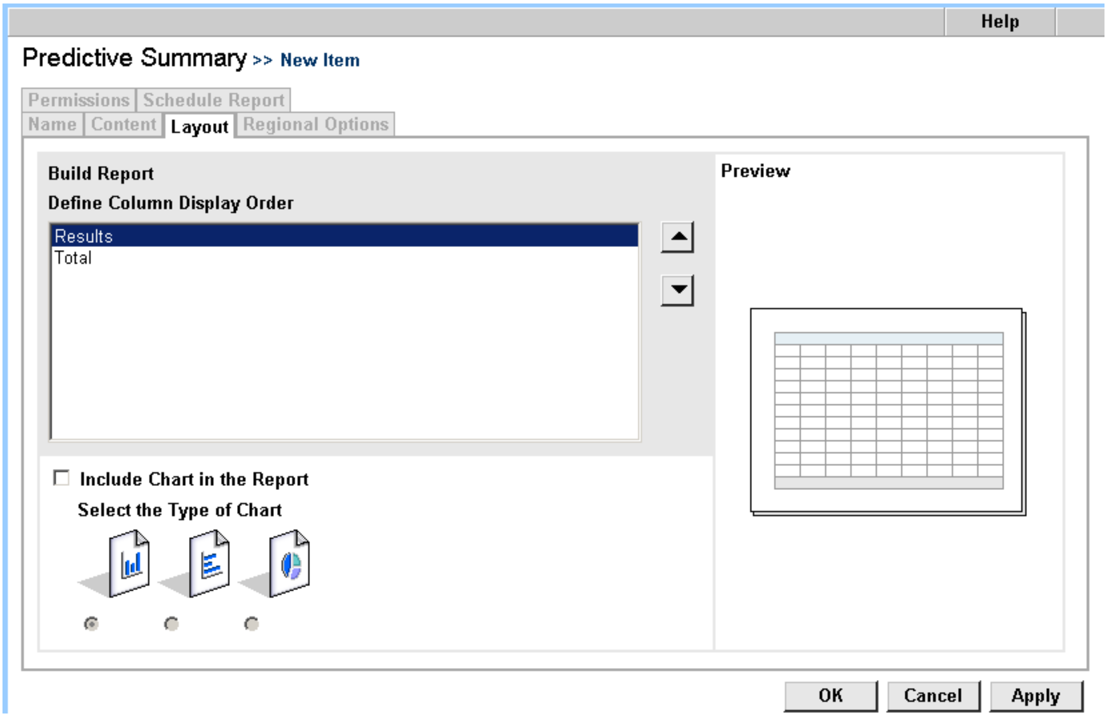


Figure 18-16 Predictive Summary Report: Layout Tab

6. Using the information in Table 18-13, complete the fields.

Table 18-13. Layout Tab Fields and Descriptions

Field	Description
Build Report	Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or click the down arrow ( ) to move the column down. To include a chart in the report, select the **Include Chart** box and then select the type of chart to include. The format of the report appears on the right hand side of the page.

Table 18-13. Layout Tab Fields and Descriptions

Field	Description
Include Chart in the Report	Click this check box to include a chart in the report; then choose the chart type (vertical bar, horizontal bar, or pie chart.).

7. Click **Regional Options**. The Regional Options tab (Figure 18-17) of the Predictive Summary screen appears.

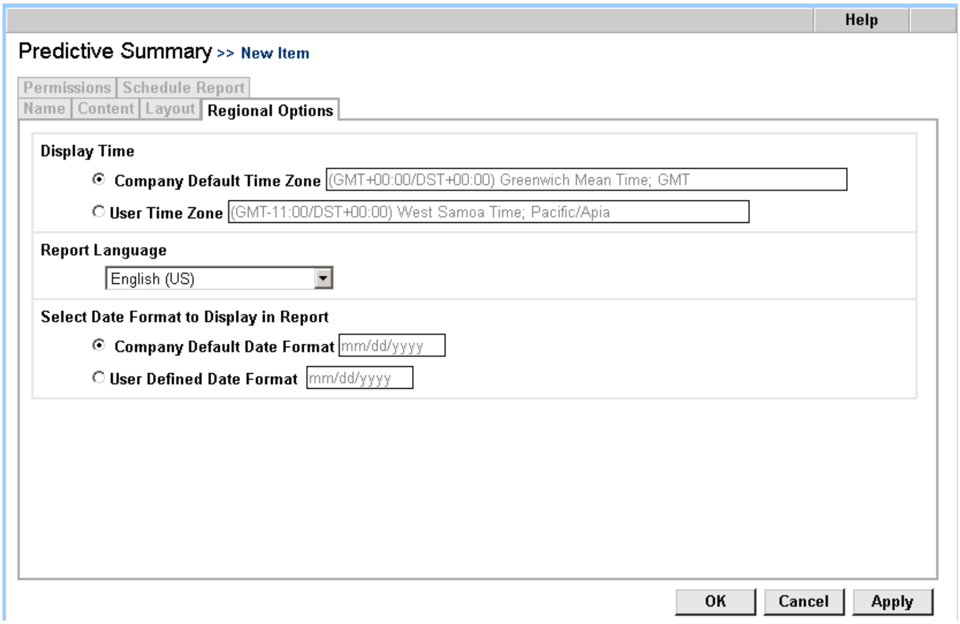


Figure 18-17 Add Report Definition: Regional Options Tab

8. Using the information in Table 18-14, complete the fields.

Table 18-14. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.

Table 18-14. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 18-18) of the Predictive Summary screen appears.

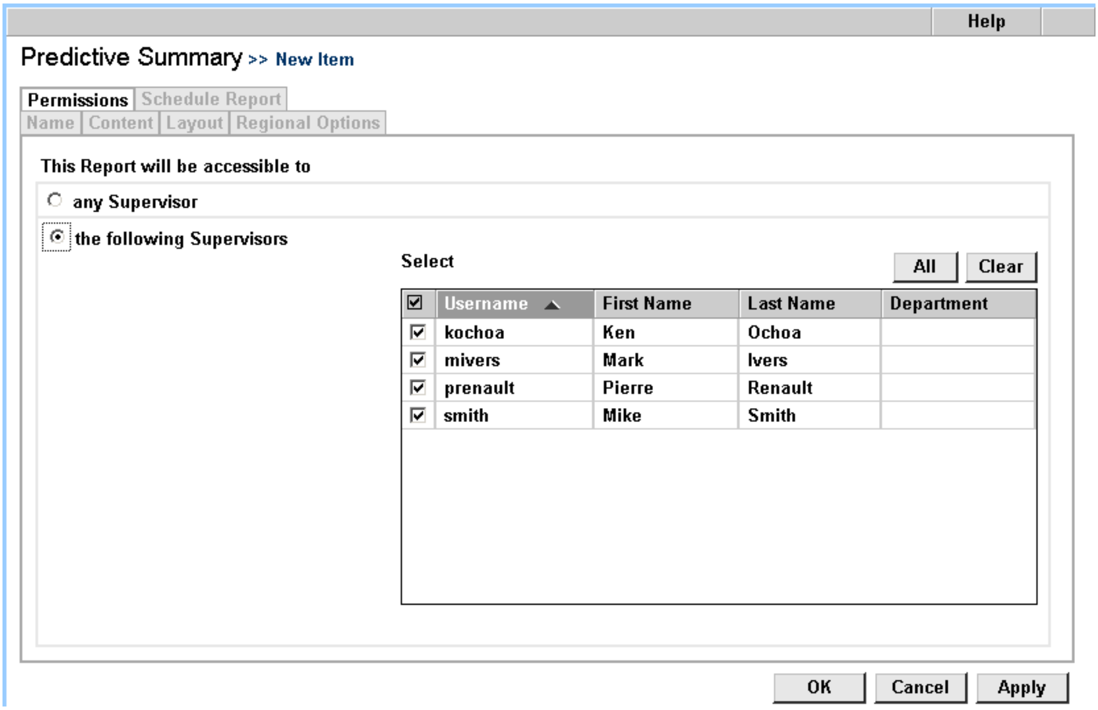


Figure 18-18 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

- For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

- For how to delete a report, see “To delete a report” on page 15-14.

Predictive Detailed Report

The ***Predictive Detailed Report*** runs in a number of ways and the report can become quite large. In general, the report shows:

- Results of the call (answered, error, answer machine, and so on)
- Outcome of the call (sale, sale pending, no sale, and so on)
- Actions taken after the call (call back later, leave a message, and so on)

Figure 18-19 shows a sample report for all results for each action.

Predictive Detailed >> Report for 05/11/04 — from 05/01/2003 at 00:00:00 to 05/11/2004 at 23:59:00

Report Includes Project: Call Center Project 1

Callback

Results	Total	
Error	0	0.00%
Busy	2	20.00%
No Answer	0	0.00%
Fax	0	0.00%
Invalid	0	0.00%
Answer, Not Connected	0	0.00%
Answering Machine	6	60.00%
Answer	2	20.00%
Answering Machine, Not Connected	0	0.00%
Total	10	100.0%

Connect To Agent

Results	Total
Error	0
Busy	

Figure 18-19 Sample Predictive Detailed Report

Report Elements

Table 18-5 describes the elements of the Predictive Detailed Report.

Table 18-15. Predictive Detailed Report Columns and Descriptions

Column	Description
Project Name	The CCA Predictive Calling Project name.
Outcome	The outcome the agent assigned to the interaction. See “Creating Interaction Outcomes” on page 4-14.
Workgroup Name	The workgroup that handled the predictive call.
Result Type	The result of the predictive call attempt: **Answer**: A person answered the predictive call **Answer, Not Connected**: The predictive call was answered but the agent and the client were not connected. **Answering Machine**: An answering machine answered the predictive call **Answering Machine, Not Connected:** The predictive call was answered but the agent and the answering machine were not connected. **Busy**: The predictive call resulted in a busy signal. **Error**: An error (no dial tone, no line available, and so on) prevented the predictive call from being placed. **Fax**: A fax machine answered the predictive call. **Invalid**: The number used for the predictive call was out of service or not a valid number. **No Answer**: There was no answer at the number dialed.
Action	The action taken as a result of the predictive call attempt: **Abandon before connect:** Call was abandon before connecting. **Call back**: Will call this number back at the specified time. **Call back message**: Left the specified message on the answering machine that answered the predictive call and will call this number back at the specified time. **Call back message failed**: Failed to leave the specified message on the answering machine that answered the predictive call. **Call failed**: The predictive call failed. **Connect to agent**: The predictive call was connected with an agent. **Leave message**: Left the specified message on the answering machine that answered the predictive call.

Table 18-15. Predictive Detailed Report Columns and Descriptions

Column	Description
	Leave message failed: Failed to leave the specified message on the answering machine that answered the predictive call. **Out of list:** The number was removed from the predictive database and will not be called again. **Route to project:** The predictive call was answered then routed to a project. **Route to project failed:** The predictive call was answered but routing to the specified project failed. **Send fax**: Sent the specified fax to the fax machine that answered the predictive call. **Send fax failed**: An attempt to send a fax was unsuccessful.

To create a Predictive Detailed Report

1. Click **Reports** > **Predictive/Preview Reports** > **Predictive Detailed** > the **Add** button. The Name tab (Figure 18-20) of the Predictive Detailed screen appears.

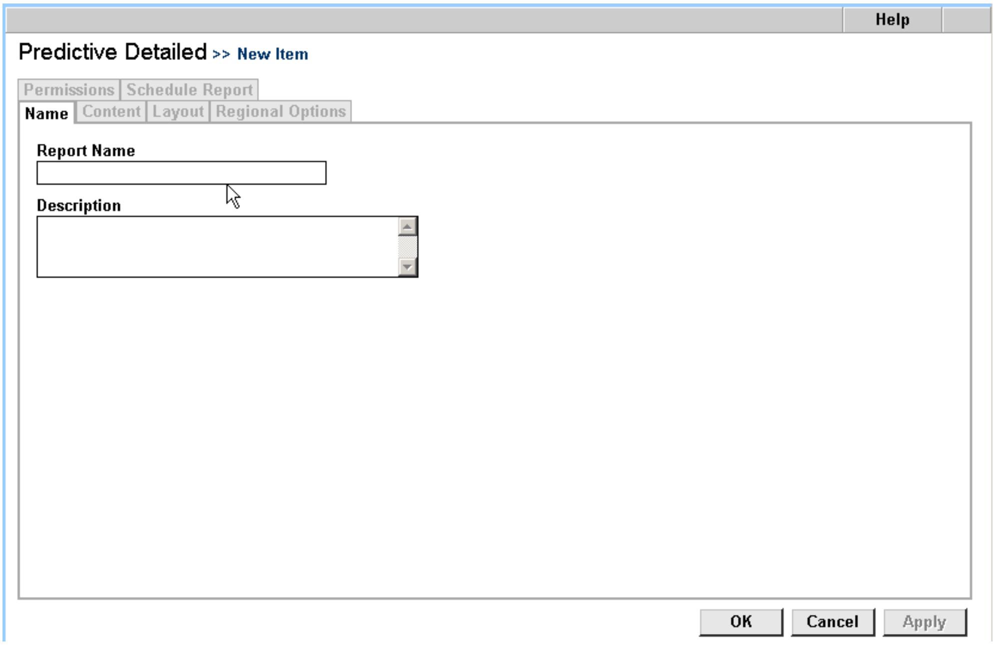


Figure 18-20 **Add Report Definition: Name Tab**

2. Using the information in Table 18-16, complete the fields.

Table 18-16. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Predictive Detailed Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Predictive Detailed Report definitions.

3. Click **Content**. The Content tab (Figure 18-21) of the Predictive Detailed screen appears.

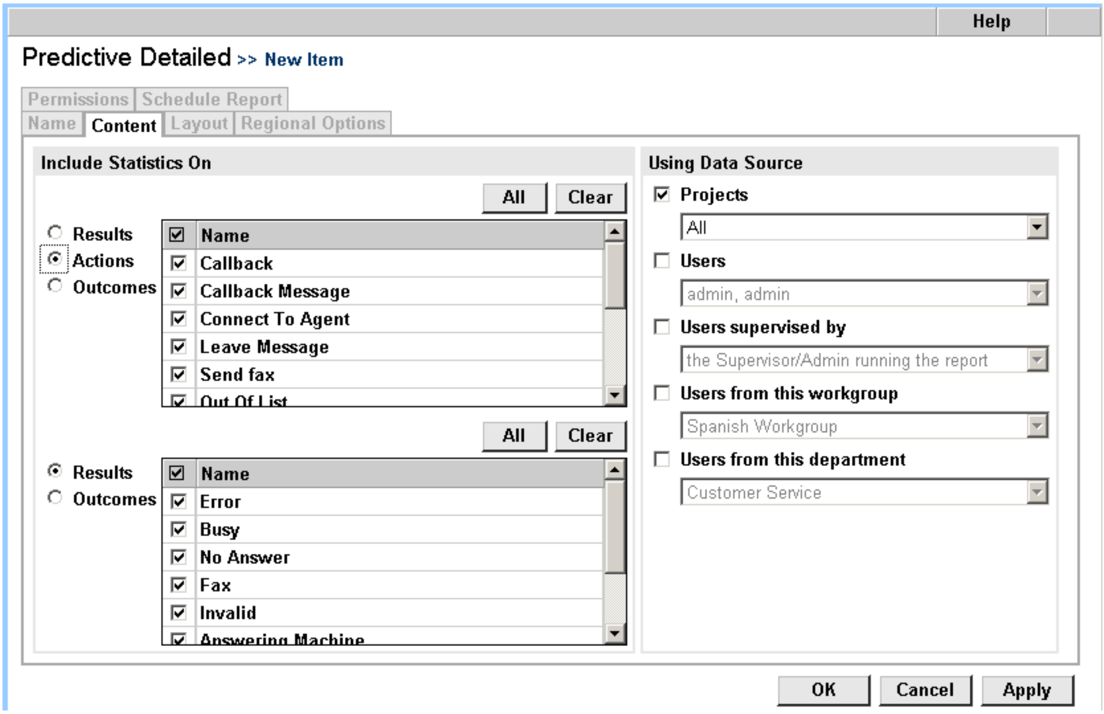


Figure 18-21 Predictive Detailed Report: Content Tab

4. Using the information in Table 18-17, complete the fields

Table 18-17. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	The Predictive Detailed Report is a ***nested*** report. Select the 'outer nest" from the top three buttons. The bottom two radio buttons are the "inner nest." **Example 1**: • Choose Results from the top three buttons • Choose Actions from the bottom two buttons. The report will look like: Error (Result 1) Callback (Action 1) Callback Message (Action 2) Connect to Agent (Action 3) . . . Busy (Result 2) Callback (Action 1) Callback Message (Action 2) Connect to Agent (Action 3) . . . **Example 2** - Try the reverse: • Choose Actions from the top three buttons • Choose Results from the bottom two buttons. The report will look like: Callback (Action 1) Error (Result 1) Busy (Result 2) No Answer (Result 3) . . . Callback Message (Action 2) Error (Result 1) Busy (Result 2) No Answer (Result 3) . . .

Table 18-17. Content Tab Fields and Descriptions

Field	Description
Using Data Source	Click the data group source to report. • **Projects**: Choose from all projects defined for the company. • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 18-22) of the Predictive Detailed screen appears.

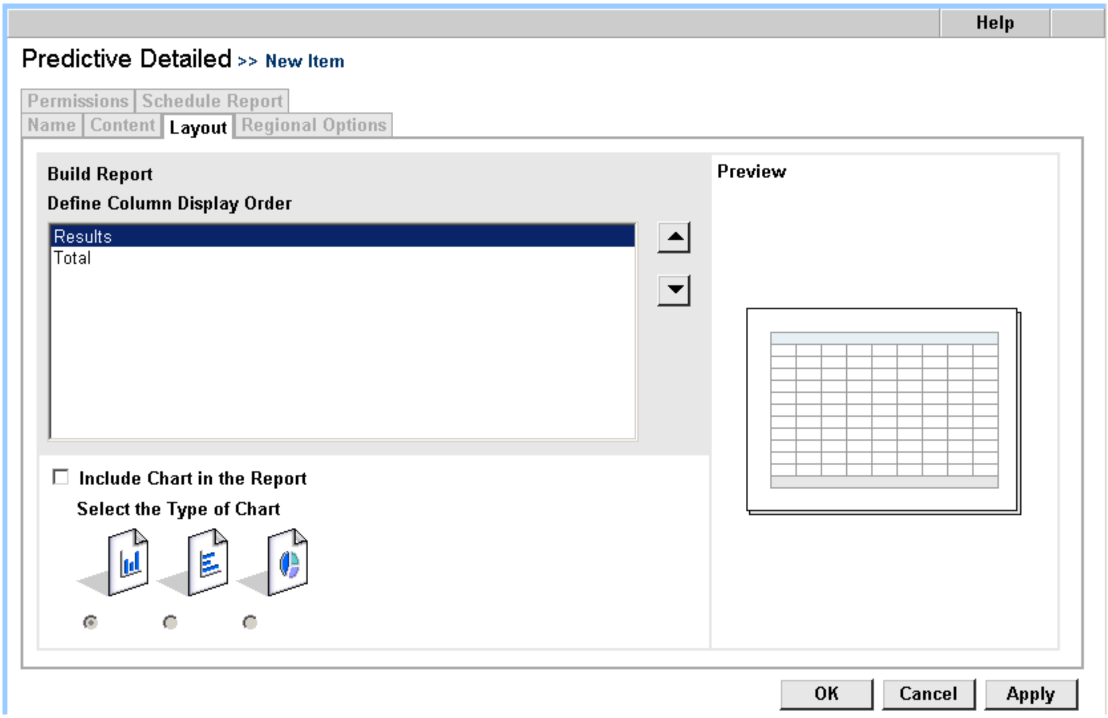


Figure 18-22 Predictive Detailed Report: Layout Tab

6. Using the information in Table 18-18, complete the fields.

Table 18-18. Layout Tab Fields and Descriptions

Field	Description
Build Report	Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down.
Include a Chart	Click the **Include a Chart**" button to include a chart in the report. Then, select the type of chart to include. The layout of the report appears on the right of the page.

7. Click **Regional Options**. The Regional Options tab (Figure 18-23) of the Predictive Detailed screen appears.

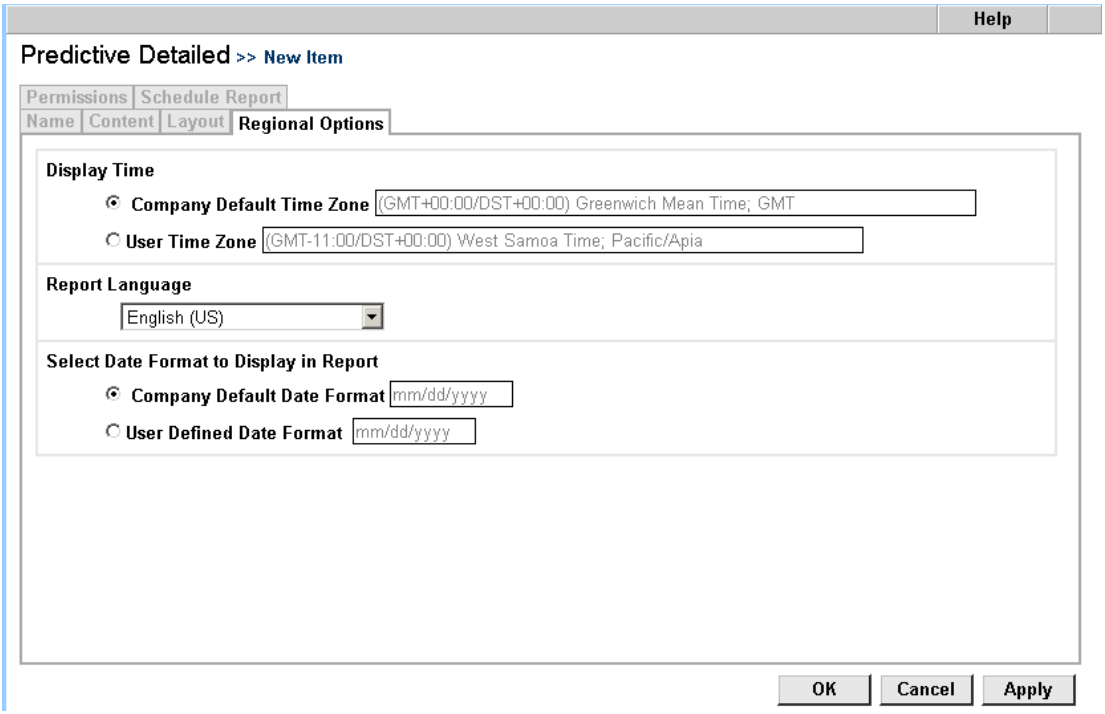


Figure 18-23 Add Report Definition: Regional Options Tab

8. Using the information in Table 18-19, complete the fields.

Table 18-19. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 18-24) of the Predictive Detailed screen appears.

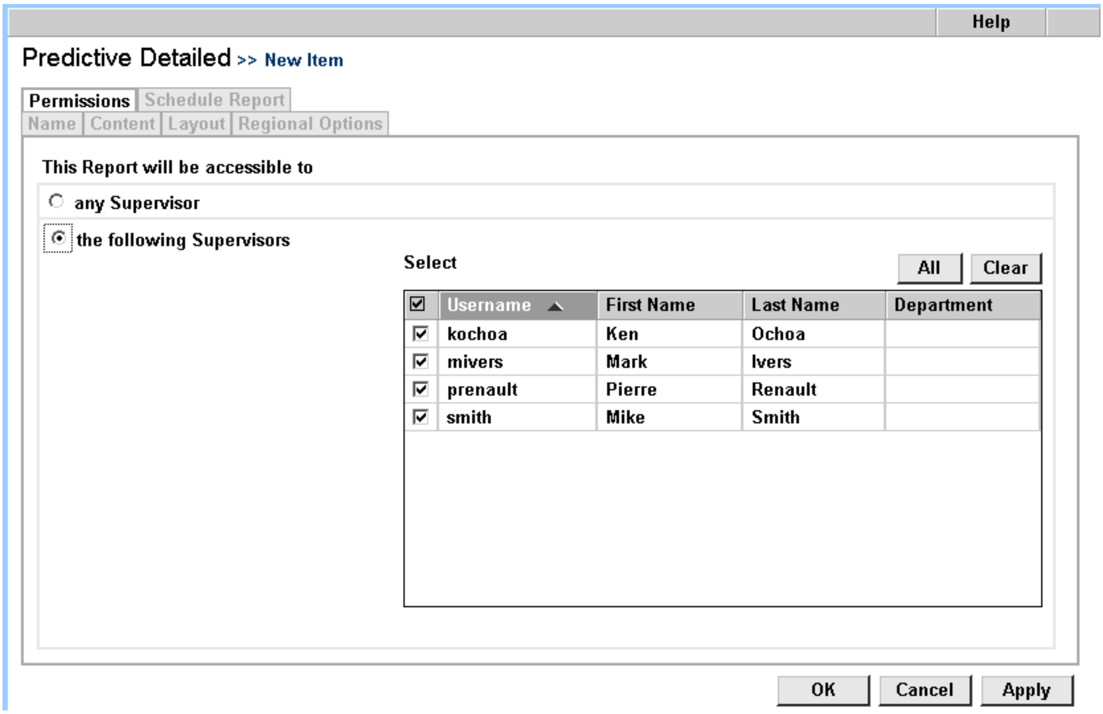


Figure 18-24 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report. ‘

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Preview Summary Report

The ***Preview Summary Report*** (Figure 18-25) displays a breakdown of the results (busy, no answer, and so on) of all preview call attempts and the follow-up action taken in response to each result.

Preview Summary Report >> Report for 12/17/02 — from 12/01/2002 at 00:00 to 12/17/2002 at 23:59

Report Includes All Projects

Project	Outcome	Phone	Action
Call Center West 1	Order Placed	8586389724	Answered
Call Center West 1	Order Placed	8586389725	Answered
Call Center West 2	Order Pending	8586389726	Answered
Call Center West 2	Not Applicable	8586389727	Callback

Generated on 12/17/2002 at 18:33 — (GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 18-25 The Preview Summary Report

Report Elements

Table 18-20 provides the ***Preview Summary Report*** columns and descriptions.

Table 18-20. Preview Summary Report Columns

Column	Description
Project	The CCA preview calling project name.
Outcome	The outcome the agent assigned to the interaction.
Phone	The telephone number dialed in the preview call attempt.
Action	The action taken as a result of the predictive call attempt: **Call Back**: Will call this number back at the specified time. **Call not connected**: An answering machine answered the predictive call. **Connected**: Predictive call was connected with an agent. **Failed to send fax**: An attempt to send a fax was unsuccessful. **Fax file not found**: The .TIF file to be faxed could not be found at the specified location.

Table 18-20. Preview Summary Report Columns

Column	Description
	Fax sent: Sent the specified fax to the fax machine that answered the predictive call. **Left message and will call back**: Left the specified message on the answering machine that answered the predictive call and will call this number back at the specified time. **License not available**: No license is available to permit connection of the predictive interaction to an agent. **Message on the answering machine**: Left the specified message on the answering machine that answered the predictive call. **Remove from list**: The number was removed from the predictive database and will not be called again.

To create a Preview Summary Report

1. Click **Reports** > **Predictive/Preview Reports** > **Preview Summary** > the **Add** button. The Add Preview Summary screen (Figure 18-26) opens to the Name tab.

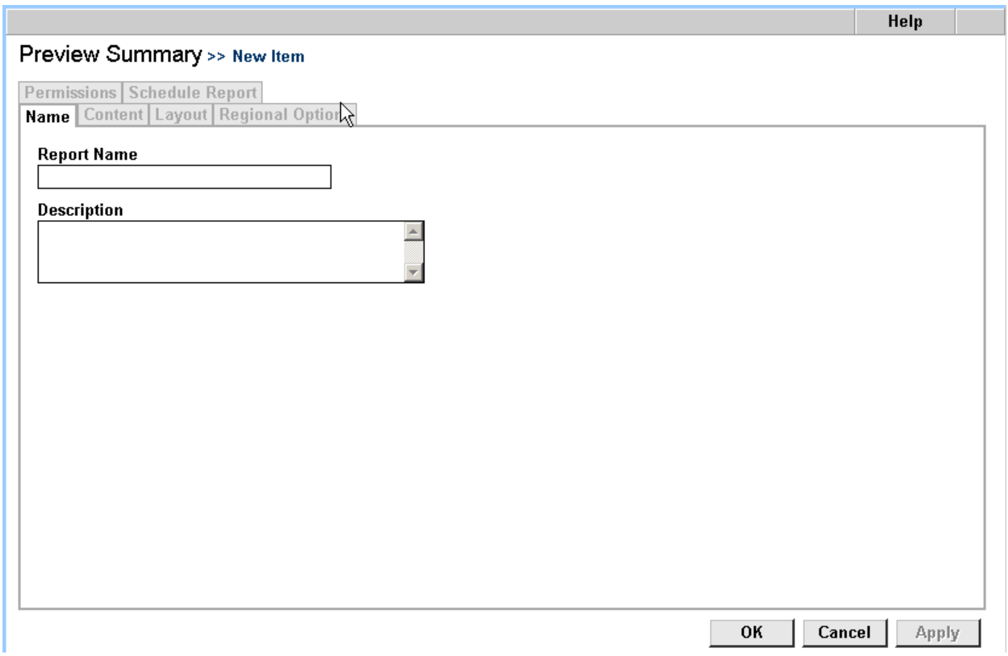


Figure 18-26 Add Report Definition: Name Tab

2. Using the information in Table 18-21, complete the fields.

Table 18-21. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Preview Summary Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Preview Summary Report definitions.

3. Click the **Content** tab. The Content tab (Figure 18-27) appears.

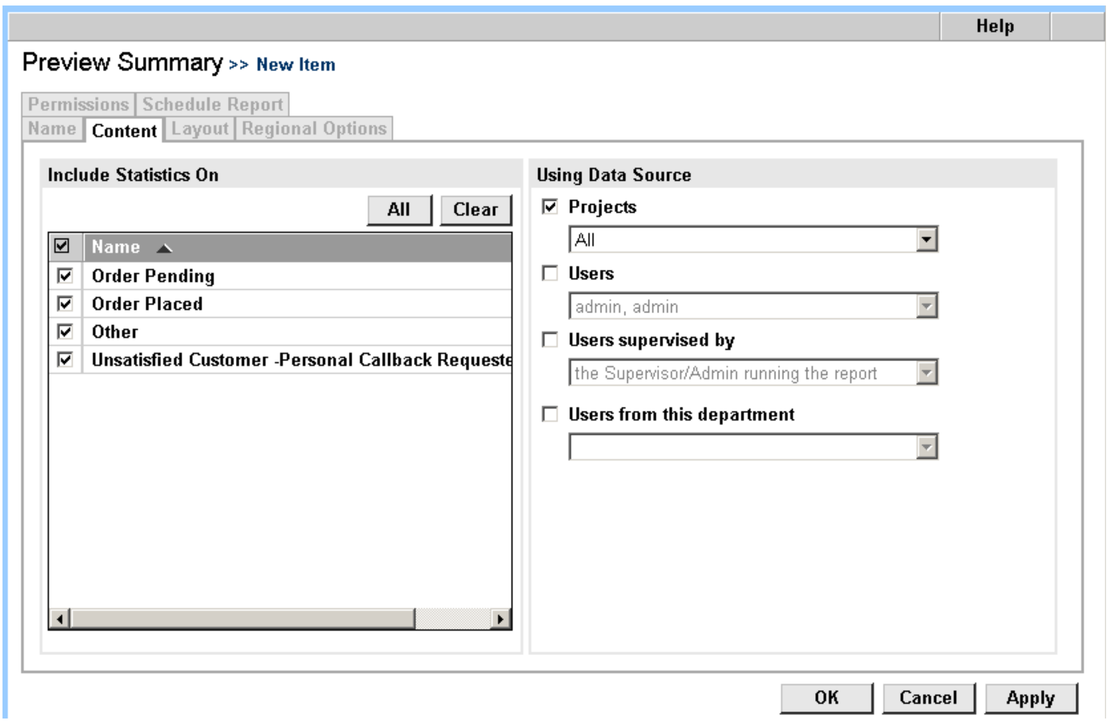


Figure 18-27 **Preview Summary Report: Content Tab**

4. Using the information in Table 18-22, complete the fields.

Table 18-22. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Check the predictive results to include in the report. Click **All** to include all predictive results or click **Clear** to clear all selections.
Using Data Source	Click the data group source to report: • **Projects**: Choose from all projects defined for the company. • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 18-28) appears.

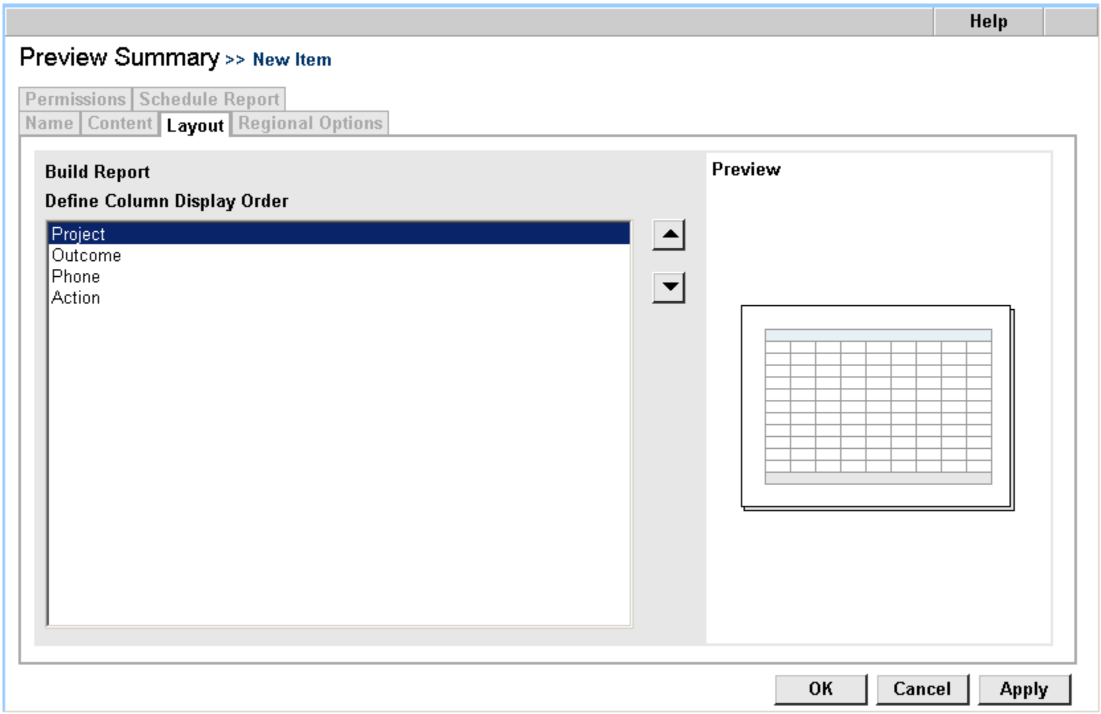


Figure 18-28 Preview Summary Report: Layout Tab

6. Using the information in Table 18-23, complete the fields.

Table 18-23. Layout Tab Fields and Descriptions

Field	Description
Build Report	Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down.

7. Click **Regional Options**. The Regional Options tab (Figure 18-29) appears.

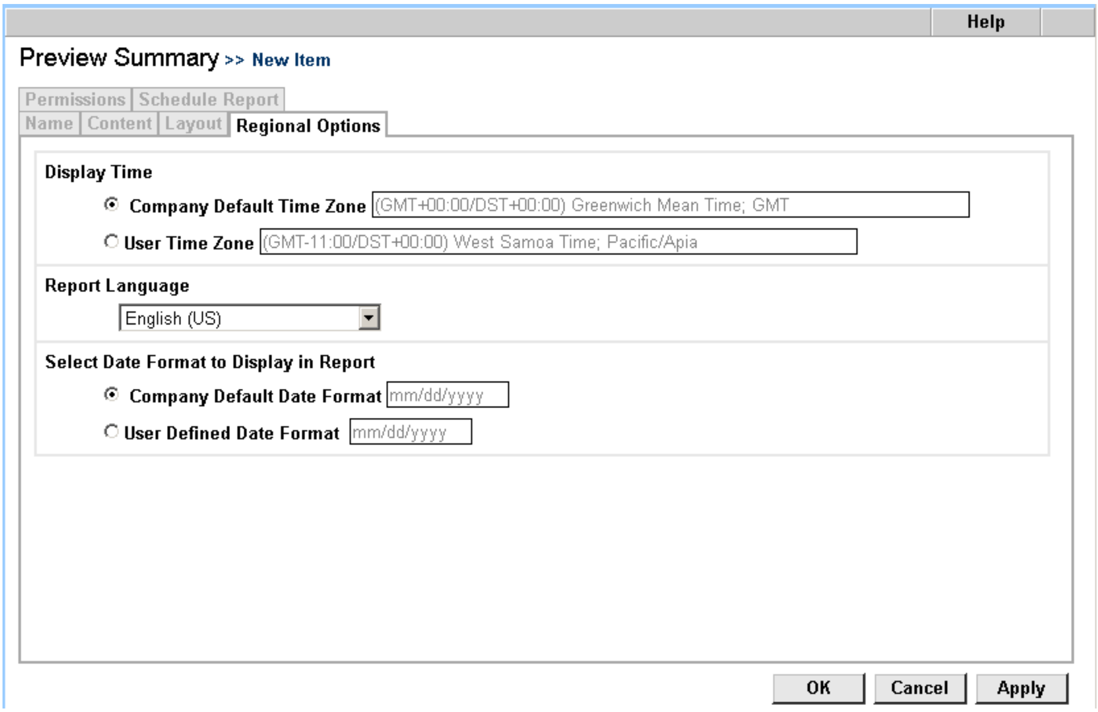


Figure 18-29 Add Report Definition: Regional Options Tab

8. Using the information in Table 18-24, complete the fields.

Table 18-24. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 18-30) appears.

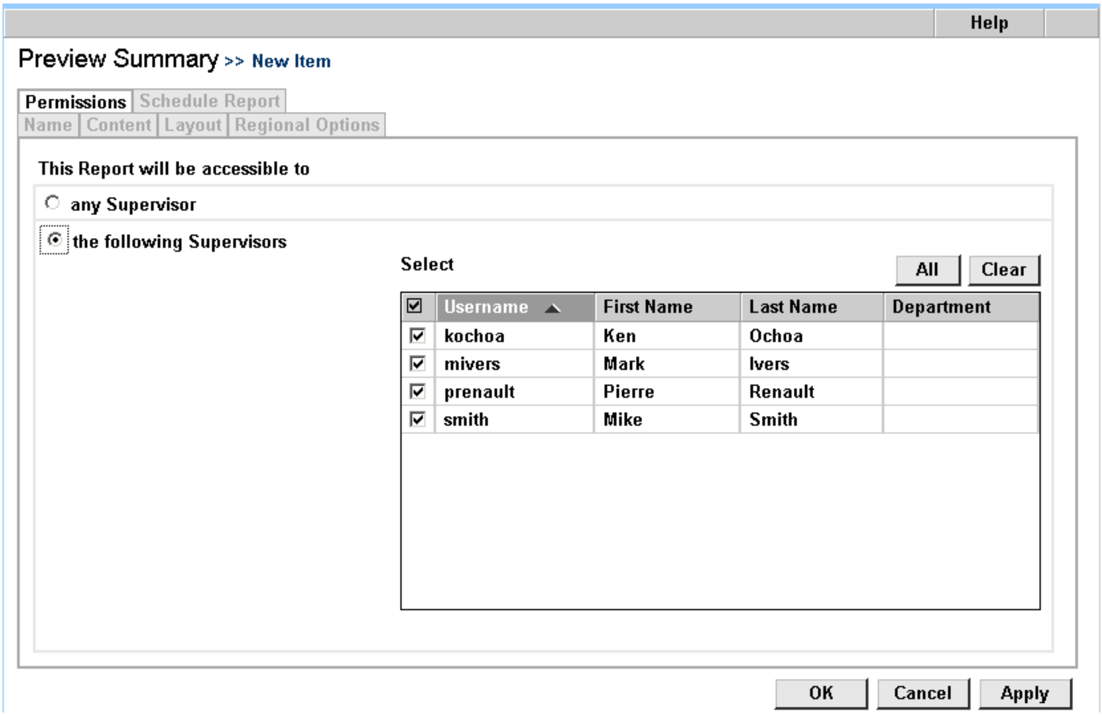


Figure 18-30 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

The Agent Profile and Productivity Reports

Agent Information Report

The ***Agent Information Report*** (Figure 19-1) can show the following profile information for each agent in the selected Workgroups:

- First and last name
- Telephone number
- Phone Extension
- Email address
- Active Address
- Skills assigned to the Agent
- Workgroups the Agent is a member of

Although you can select and remove columns from the report, this report always sorts by the agent's last name.

Agent Information Report >> Agent Information

Report Includes Users: dmarlow, troland, msands, akeller, mbrolan, jjones, apaxton

Last Name	Username	First Name	Phone	Extension	E-mail	Active Address	Skills	Workgroups	Account Standing
Marlow	dmarlow	Debbie	1-	460	dmarlow@ccw1.com	1-8586389142		English	Active
Rowland	troland	Tim	1-	5454	troland@ccw1.com	1-8582455762		English	Active
Sands	msands	Max	1-	5009	msands@ccw1.com	1-8582455009		English	Active
Keller	akeller	Art	1-	6777	mkeller@ccw1.com	1-8584103960		English	Active
Brolan	mbrolan	Michael	1-	1104	mbrolan@ccw1.com			English	Active
Jones	jjones	Jonathon	1-	5346	jjones@ccw1.com	1324234234		English	Active
Paxton	apaxton	andrew	1-	2001	apaxton@ccw1.com	1-8586389340		English	Active

Generated on 20.12.2002 at 11:03 (GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 19-1 Agent Information Report

To create an Agent Information Report

1. Click **Reports** > **Agent Profile & Productivity** > **Agent Information** > the **Add** button.

   The Add Agent Information (Figure 19-2) screen opens to the Name tab.

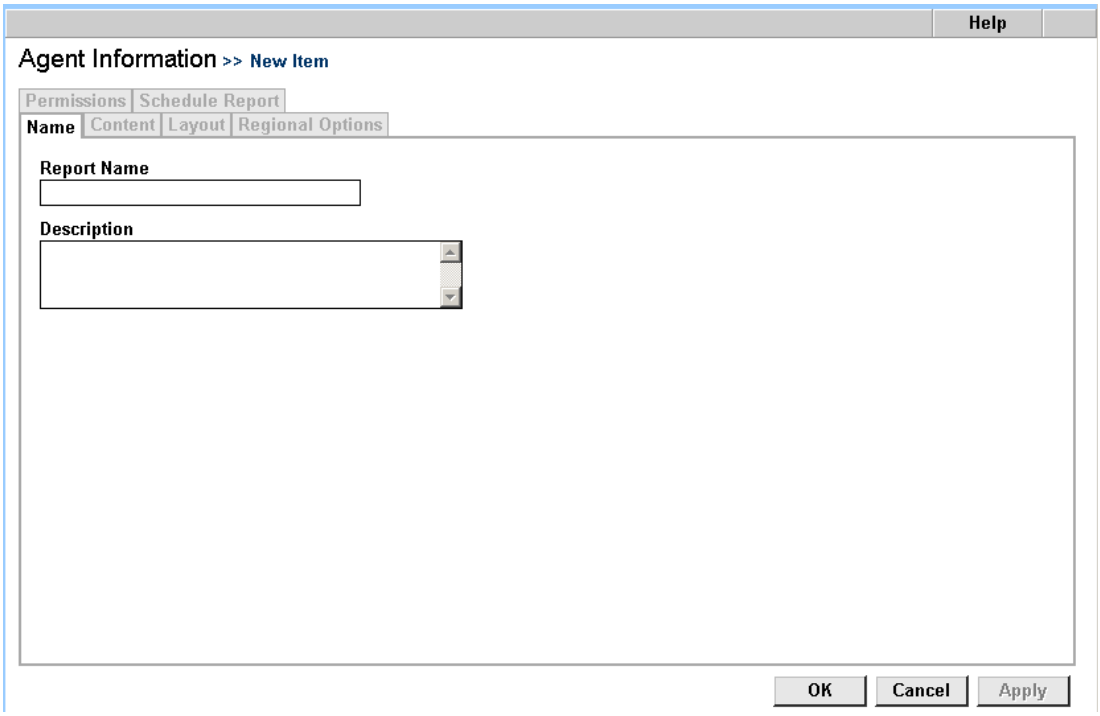


Figure 19-2 Add Report Definition: Name Tab

2. Using the information in Table 19-1, complete the fields.

Table 19-1. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of agent Information report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of agent Information report definitions.

3. Click **Content**. The Content tab (Figure 19-3) appears.

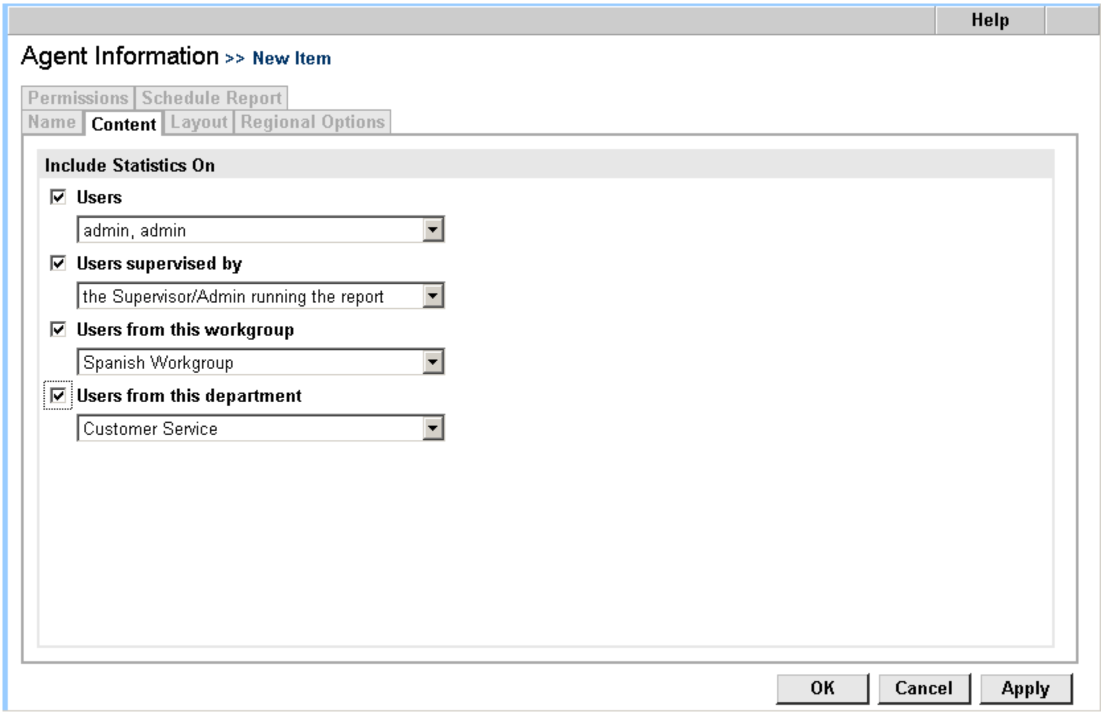


Figure 19-3 Agent Information Report: Content Tab

4. Using the information in Table 19-2, complete the fields.

Table 19-2. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 19-4) appears.

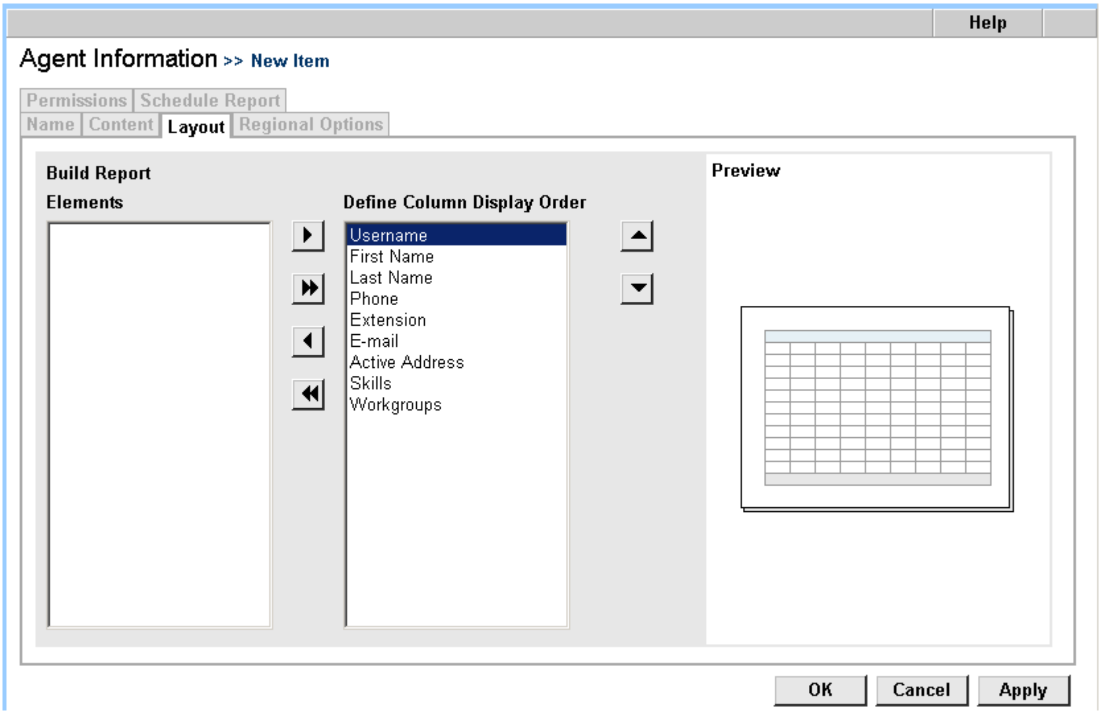


Figure 19-4 Agent Information Report: Layout Tab

6. Using the information in Table 19-3, complete the fields.

Table 19-3. Layout Tab Fields and Descriptions

Field	Description
Build Report	In the **Elements** box. include elements by clicking an item and then clicking the right arrow ( ) or clicking the double arrows ( ) to include all elements. Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down. **Note**: Although you can select and remove columns from the report, this report always sorts by the agent's last name.

7. Click **Regional Options**. The Regional Options tab (Figure 19-5) appears.

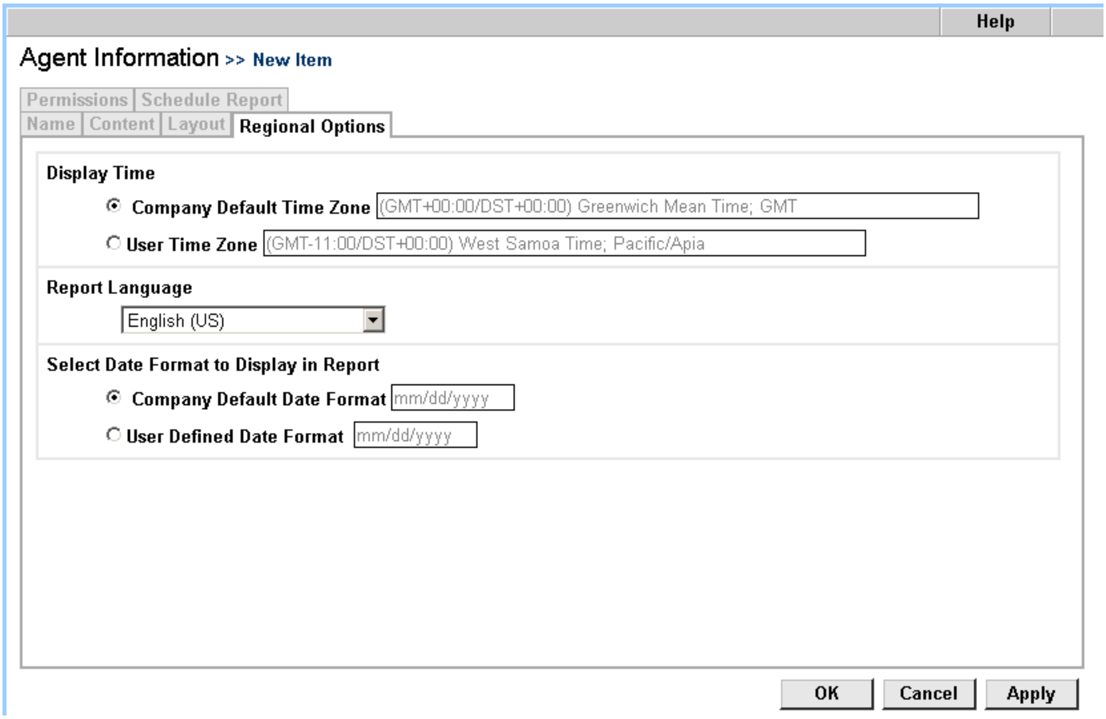


Figure 19-5 Add Report Definition: Regional Options Tab

8. Using the information in Table 19-4, complete the fields.

Table 19-4. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 19-6) appears.

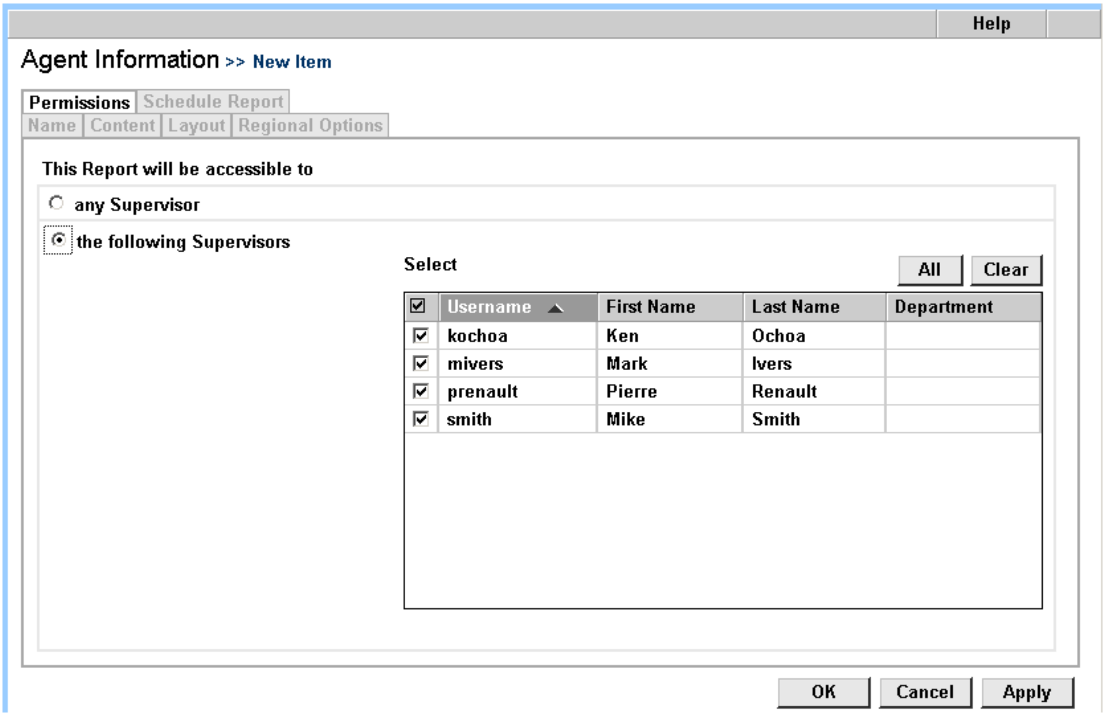


Figure 19-6 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Agent Interaction Report

The ***Agent Interaction Report*** (Figure 19-7) lets you analyze agent use by showing how long each agent spent handling interactions, awaiting interactions, or on break.

If you run this report "by workgroup" (see "Using Data Source" on page 19-11) the report will NOT contain direct inbound or direct outbound calls that the agent made or received, since direct calls are not routed through workgroups.

Agent Interaction Report >> Agent Interaction

from 01.12.2002 at 00:00
to 17.12.2002 at 23:59

Report Includes Workgroups: Andrew 1, john-workgroup, Mike Workgroup 1, russ A, Tim WG1

Agents	Predictive	Inbound	Voicemail	Callback	Web Callback	Outbound	In Ext	Out Ext	Workgroup Email	Workgroup Fax	Chat	Preview	Workgroup Calls	Total
agent e100 s0 abab	0	0	9	5	11	0	0	0	20	0	4	0	18	67
agent tim1	0	0	11	4	0	0	0	0	0	0	0	0	60	75
agent tim2	0	0	0	0	0	0	0	0	0	0	0	0	4	4
andrew E0 S0 agent1	0	0	1	5	11	0	0	0	6	0	10	0	60	93
andrew e50 S100 agent2	0	0	0	0	0	0	0	0	0	0	1	0	0	1
John1 Doe	0	0	7	2	4	0	0	0	36	0	1	0	1	51
Mike1 Agent	38	0	4	3	0	0	0	0	0	0	1	0	45	91
Mike2 Agent	0	0	0	0	0	0	0	0	0	0	0	0	4	4
russellA1 levyA1	0	0	1	0	0	0	0	0	0	0	0	0	1	2

Generated on 17.12.2002 at 18:38

(GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 19-7 Agent Interaction Report

Report Elements

Each row of the ***Agent Interaction Report*** is dedicated to a single agent. The report columns show details on the interaction types handled by the agent. Table 19-5 provides a description for each of the columns appearing in this report.

Table 19-5. Agent Interaction Report

Column	Description
Workgroup Calls	The number of workgroup calls the agent accepted.

Table 19-5. Agent Interaction Report

Column	Description
Voicemail	The number of voicemail interactions the agent accepted.
CallBack	The number of callback interactions the agent accepted.
Web CallBack	The number of Web callback interactions the agent accepted.
Outbound	The number of outbound calls the agent placed to customers.
Inbound	The number of inbound calls originated by a customer and accepted by the agent.
In Ext	The number of telephone calls the agent received from to another CCA agent.
Out Ext	The number of telephone calls this agent placed to other CCA agents.
Email	The number of email interactions the agent accepted.
Fax	The number of fax interactions the agent accepted.
Chat	The number of chat interactions the agent accepted.
Preview	The number of preview call interactions the agent placed.
Predictive	The number of predictive call interactions the agent accepted.
Total	The total number of interactions the agent handled.

To create an Agent Interaction Report

1. Click **Reports** > **Agent Profile & Productivity** > A**gent Interaction** > the **Add** button.

   The Agent Interaction screen (Figure 19-8) opens to the Name tab.

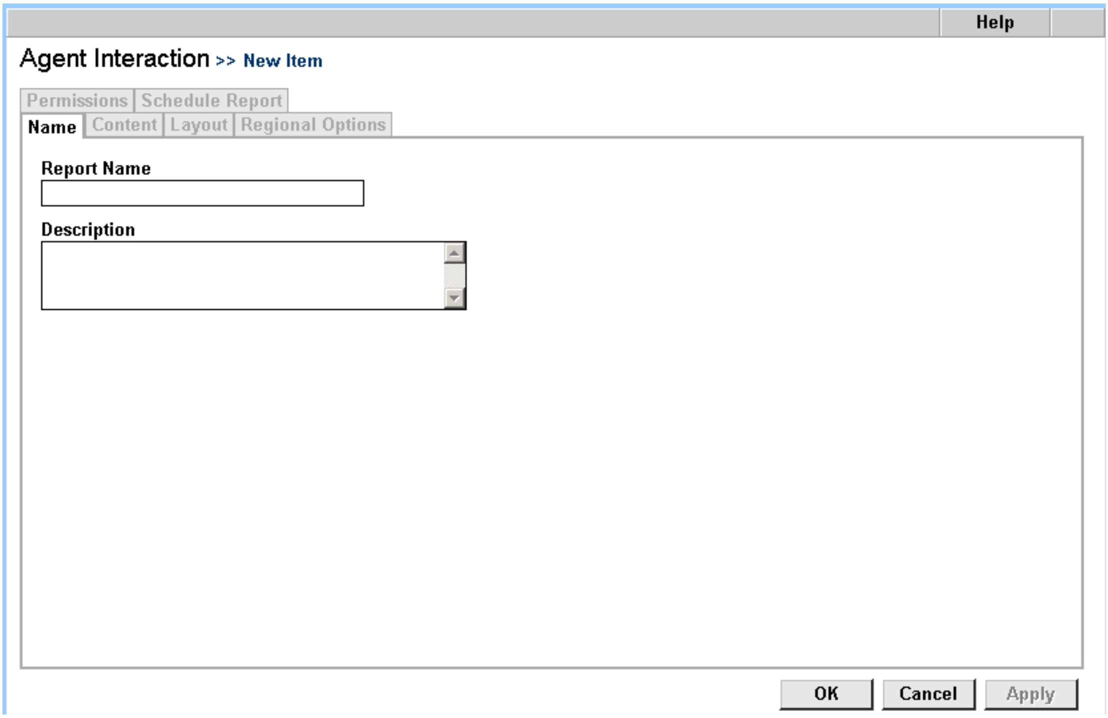


Figure 19-8 Add Report Definition: Name Tab

2. Using the information in Table 19-6, complete the fields.

Table 19-6. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of agent interaction report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of agent interaction report definitions.

3. Click **Content**. The Content tab (Figure 19-9) appears.

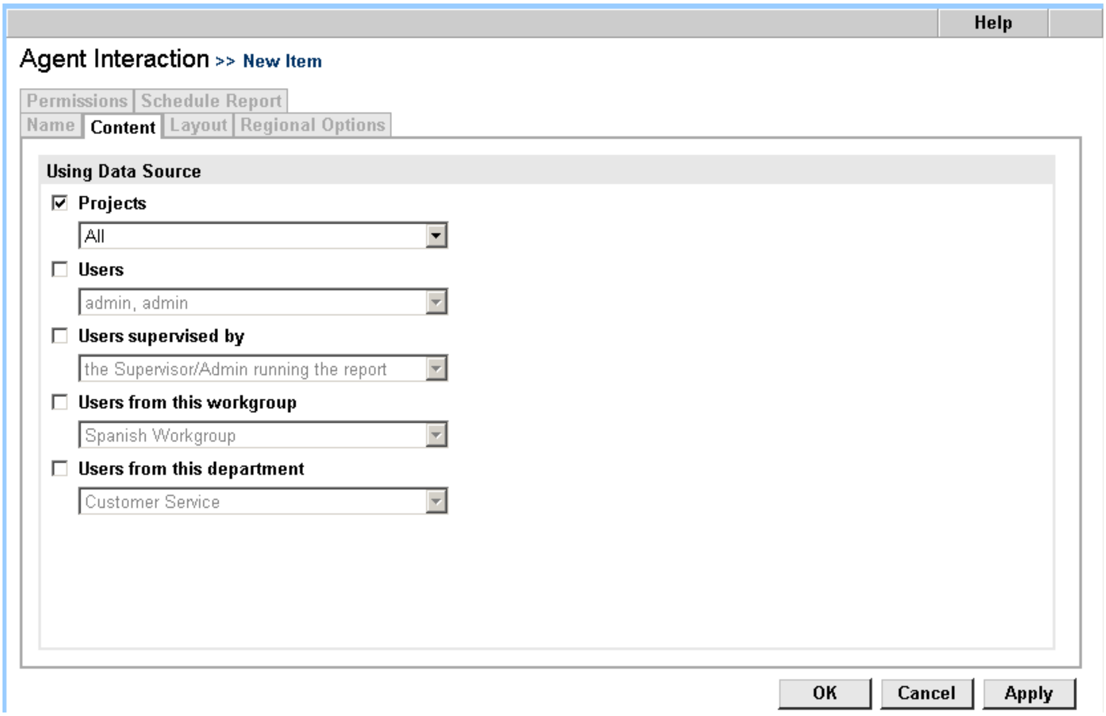


Figure 19-9 Agent Interaction Report: Content Tab

4. Using the information in Table 19-7, complete the fields.

Table 19-7. Content Tab FIelds and Descriptions

Field	Description
Using Data Source	Click the data group source to report: • **Projects**: Choose from all projects defined for the company. • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. **Note**: If you choose "Users from this Workgroup," the report will NOT contain direct inbound or direct outbound calls that the agent made or received, since direct calls are not routed through workgroups. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 19-10) appears.

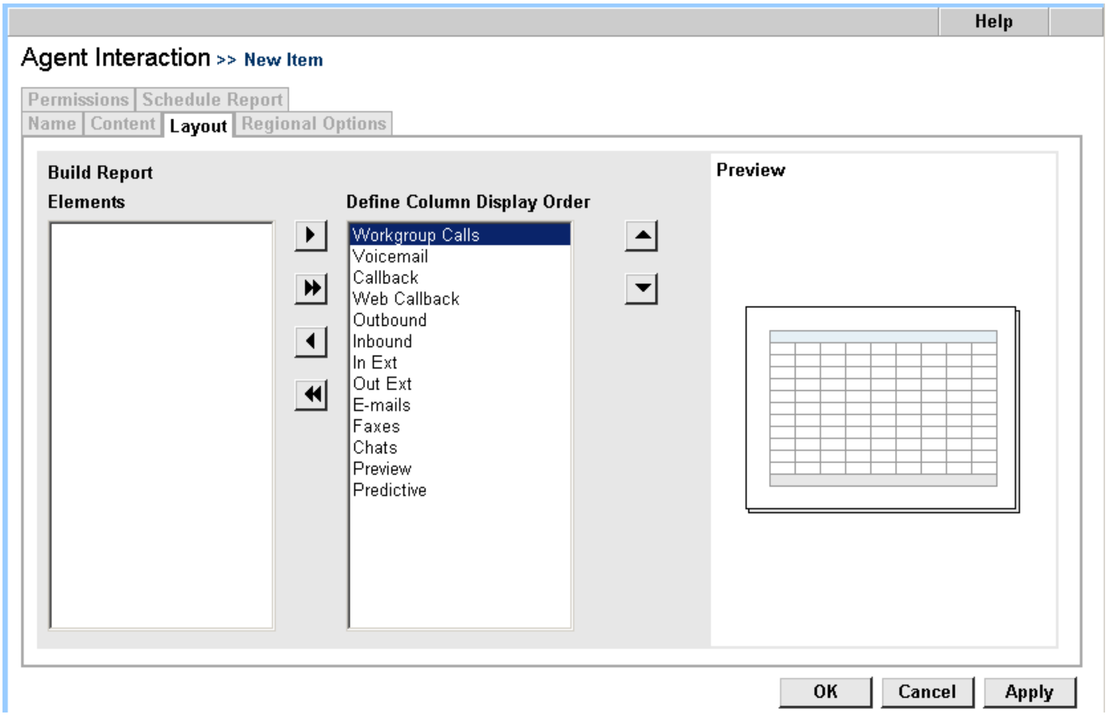


Figure 19-10 Agent Interaction Report: Layout Tab

6. Using the information in Table 19-8, complete the fields.

Table 19-8. Layout Tab Fields and Descriptions

Field	Description
Build Report	In the **Elements** box, include elements in the report by clicking the item and then clicking the right arrow ( ) or clicking the double arrows ( ) to include all. Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down.

7. Click **Regional Options**. The Regional Options tab (Figure 19-11) appears.

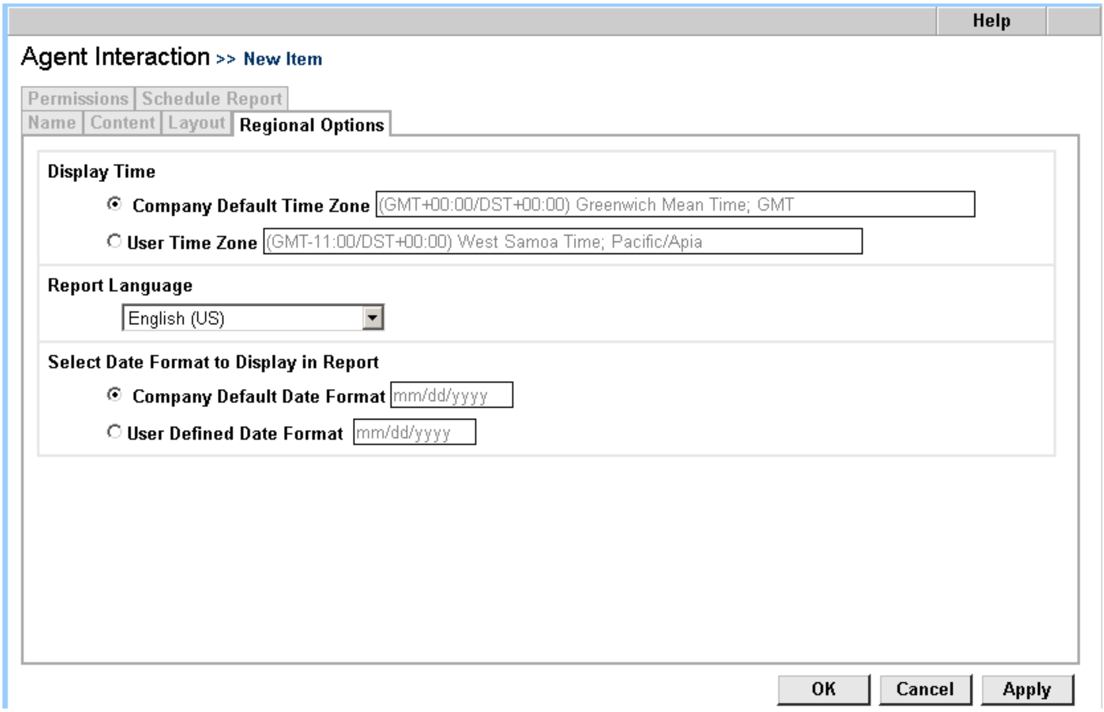


Figure 19-11 Add Report Definition: Regional Options Tab

8. Using the information in Table 19-9, complete the fields.

Table 19-9. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 19-12) appears.

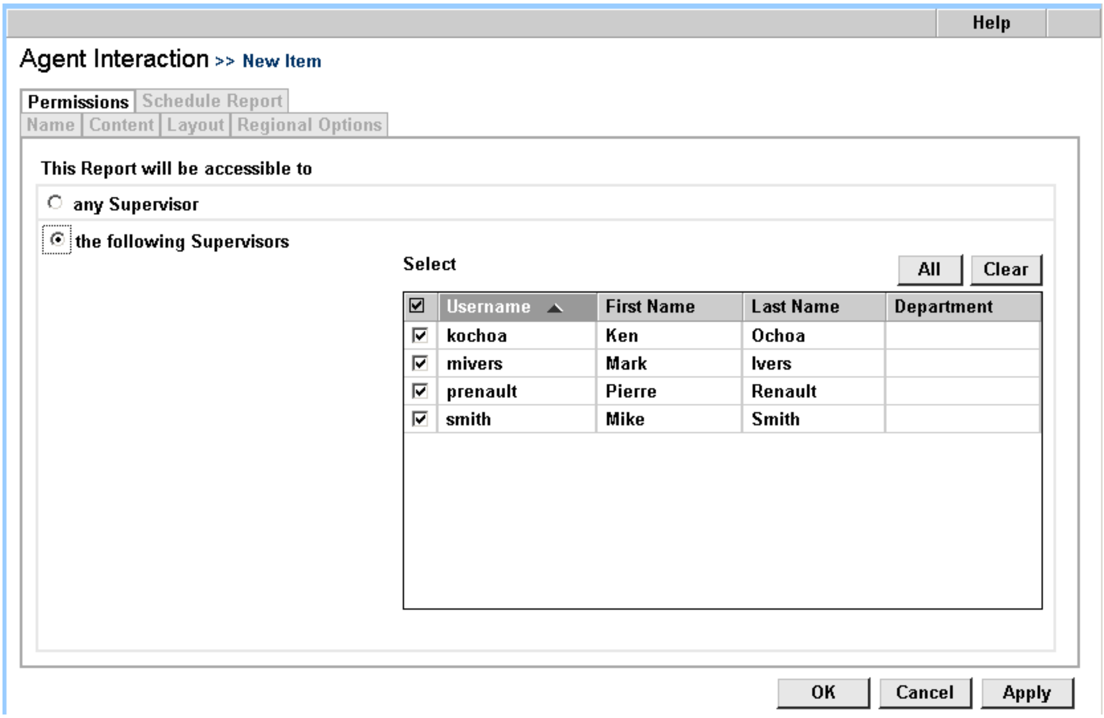


Figure 19-12 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Agent Skills Report

The ***Agent Skills Report*** (Figure 19-13) lists:

- All skills defined for the company
- Which agents possess each skill
- Each agent's rating for that skill

The ***Agent Skills Report*** quickly shows which agents possess each skill in the call center. Use this report to decide which agents to include in a workgroup with specific skills or requirements.

Agent Skills Report >> Report for 05/12/04

Report Includes Users in the department: Sales

Macintosh

Last Name	First Name	Rating
Jones	Steve	100
Marconi	Wendell	100
Ochoa	Ken	25
Renault	Pierre	25

PC

Last Name	First Name	Rating
Ivers	Mark	100
Ochoa	Ken	100
Renault	Pierre	100
Jones	Steve	50
Smith	Mike	50

UNIX

Last Name	First Name	Rating
Renault	Pierre	100
Marconi	Wendell	50
Smith	Mike	50
Ochoa	Ken	25

Figure 19-13 Agent Skills Report

To create an Agent Skills Report

1. Click **Reports** > **Agent Profile & Productivity** > **Agent Skills** > the **Add** button.

   The Add Agent Skills screen (Figure 19-14) opens to the Name tab.

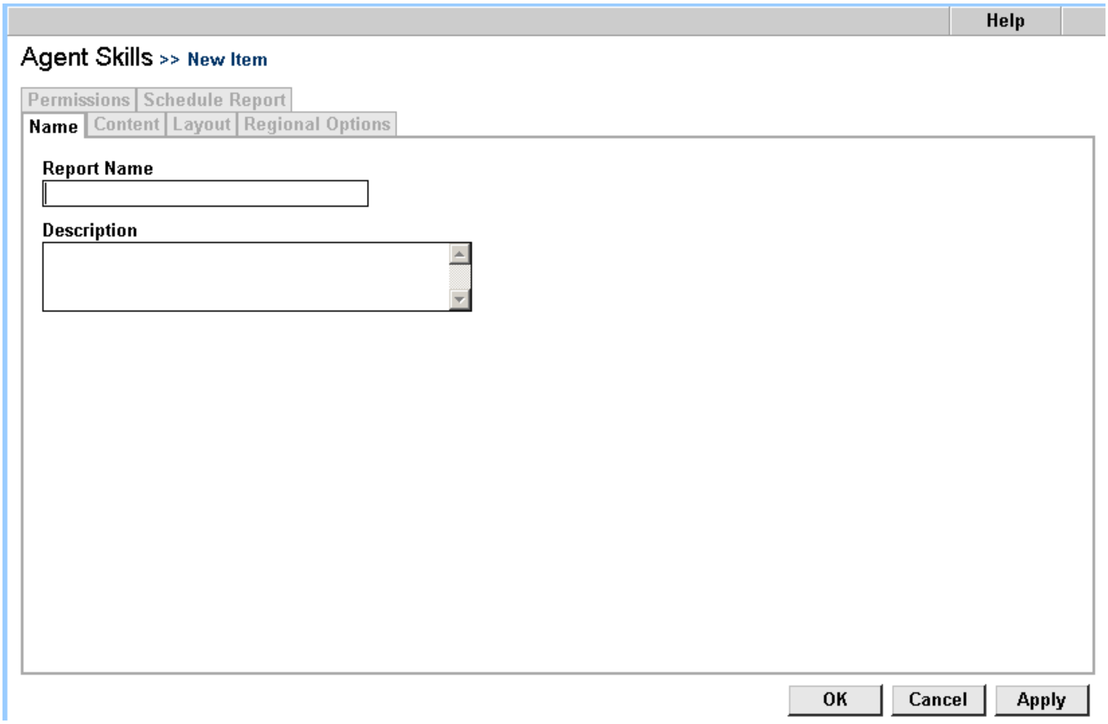


Figure 19-14 Add Report Definition: Name Tab

2. Using the information in Table 19-10, complete the fields.

Table 19-10. Name Tab FIelds and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of agent skills report definitions.

Table 19-10. Name Tab FIelds and Descriptions

Field	Description
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of agent skills report definitions.

3. Click **Content**. The Content tab (Figure 19-15) appears.

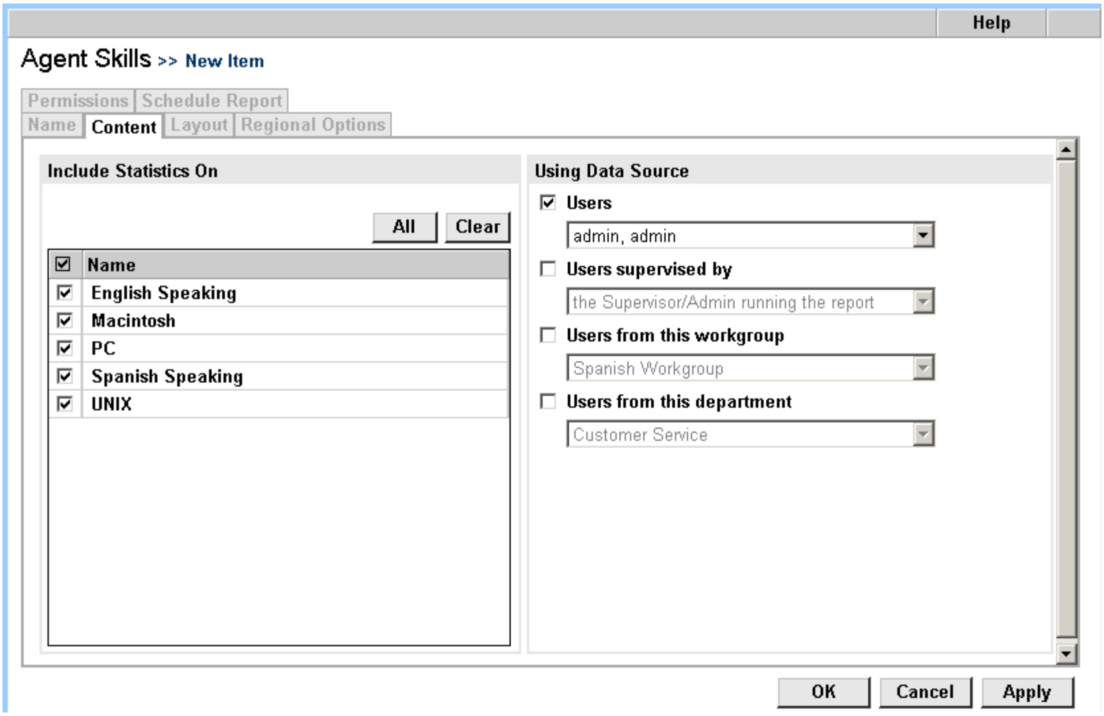


Figure 19-15 Agent Skills Report: Content Tab

4. Using the information in Table 19-11, complete the fields.

Table 19-11. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	In the **Include Statistics On** area, check the skills to include in the report. Click **All** to include all elements or click **Clear** to clear all the check boxes.
Use Data Source	Click the data group source to report: • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 19-16) appears.

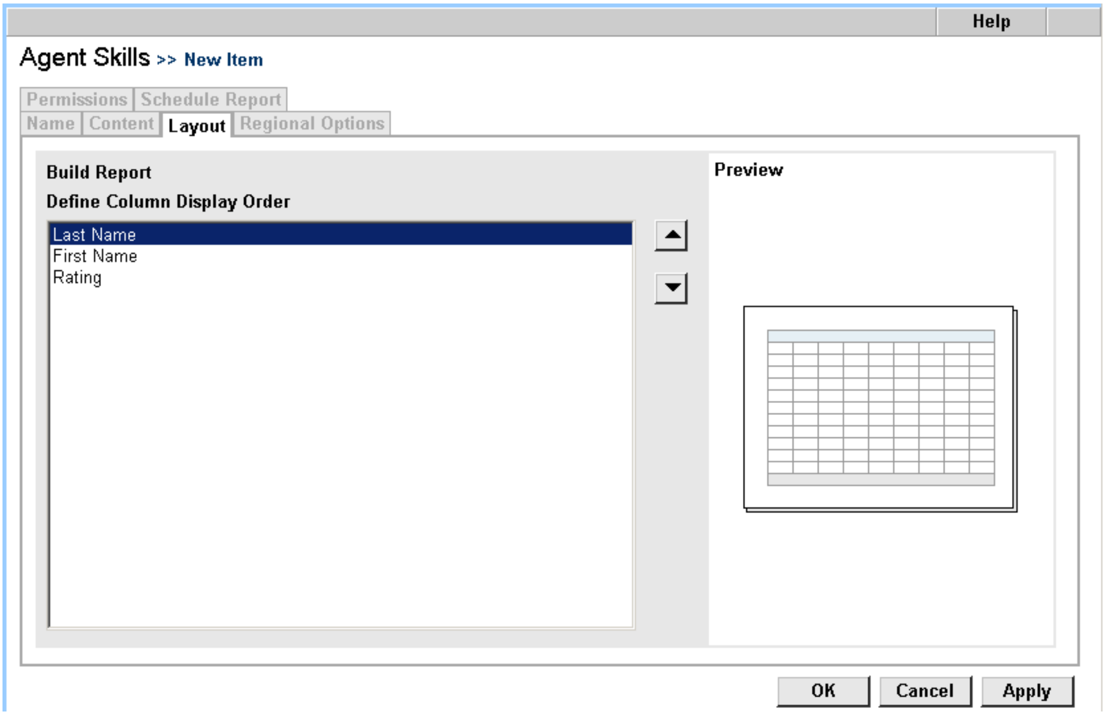


Figure 19-16 Agent Skills Report: Layout Tab

6. Using the information in Table 19-12, complete the fields.

Table 19-12. Layout Tab Fields and Descriptions

Field	Description
Build Report	Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down.

7. Click **Regional Options**. The Regional Options tab (Figure 19-17) appears.

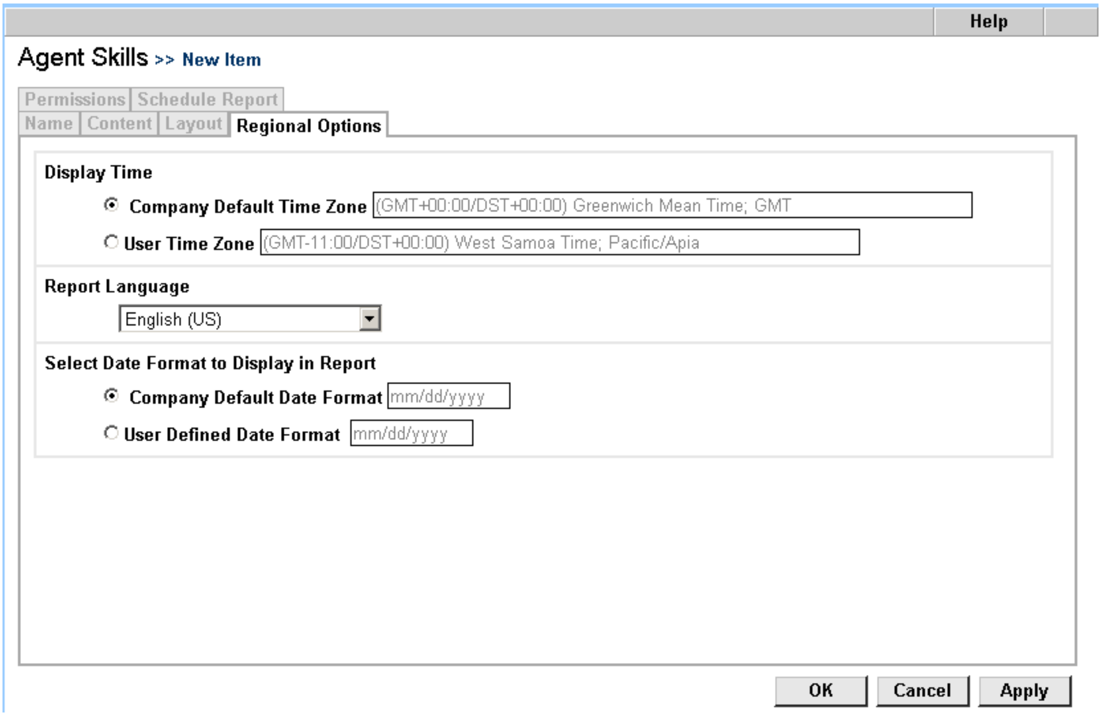


Figure 19-17 Add Report Definition: Regional Options Tab

8. Using the information in Table 19-13, complete the fields.

Table 19-13. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 19-18) appears.

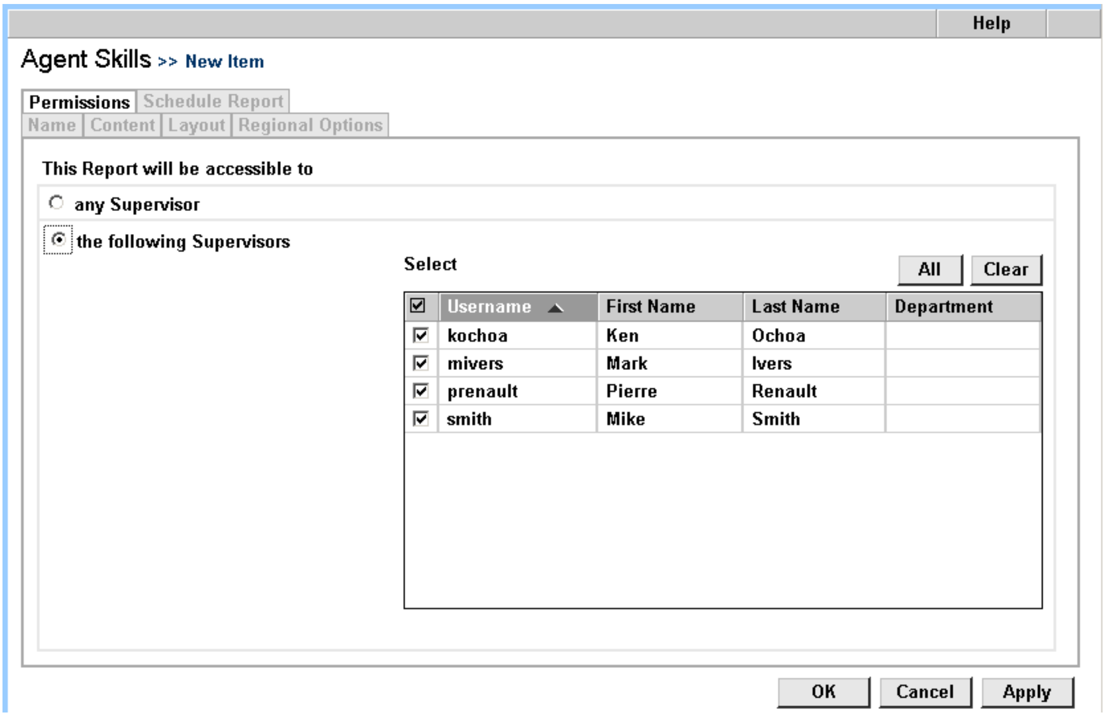


Figure 19-18 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Agent Utilization Report

The ***Agent Utilization Report*** (Figure 19-19) helps you analyze agent activity by showing how long each agent spent handling interactions, awaiting Interactions, or on break.

Agent Utilization Report >> Agent Utilization

from 01.12.2002 at 00:00
to 17.12.2002 at 23:59

Report Includes Workgroups: Spanish

Agents	On Break		Available		Busy		Total Time Logged In
Nichols, Mike	00:26:13	0.4 %	69:55:06	77.8 %	19:26:21	21.6 %	89:47:40
Aldrich, Robert	15:16:34	4.8 %	273:55:39	87.6 %	23:27:47	7.5 %	312:40:00
Lean, David	01:07:00	1.6 %	45:17:03	66.8 %	21:17:31	31.4 %	67:41:34
Neame, Ronald	01:04:59	1.5 %	43:14:51	61.1 %	26:21:02	37.2 %	70:40:52
Moore, Robert	00:12:39	0.8 %	24:02:25	97.6 %	00:21:40	1.4 %	24:36:44
Altman, Robert	00:00:00	0.0 %	05:04:44	99.7 %	00:00:40	0.2 %	05:05:24
Curtiz, Michael	00:35:15	8.2 %	04:52:17	68.4 %	01:39:38	23.3 %	07:07:10

Generated on 17.12.2002 at 18:37 (GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 19-19 Agent Utilization Report

To create an Agent Utilization Report

1. Click **Reports** > **Agent Profile & Productivity** > **Agent Utilization** > the **Add** button.

   The Agent Utilization screen (Figure 19-20) opens to the Name tab.

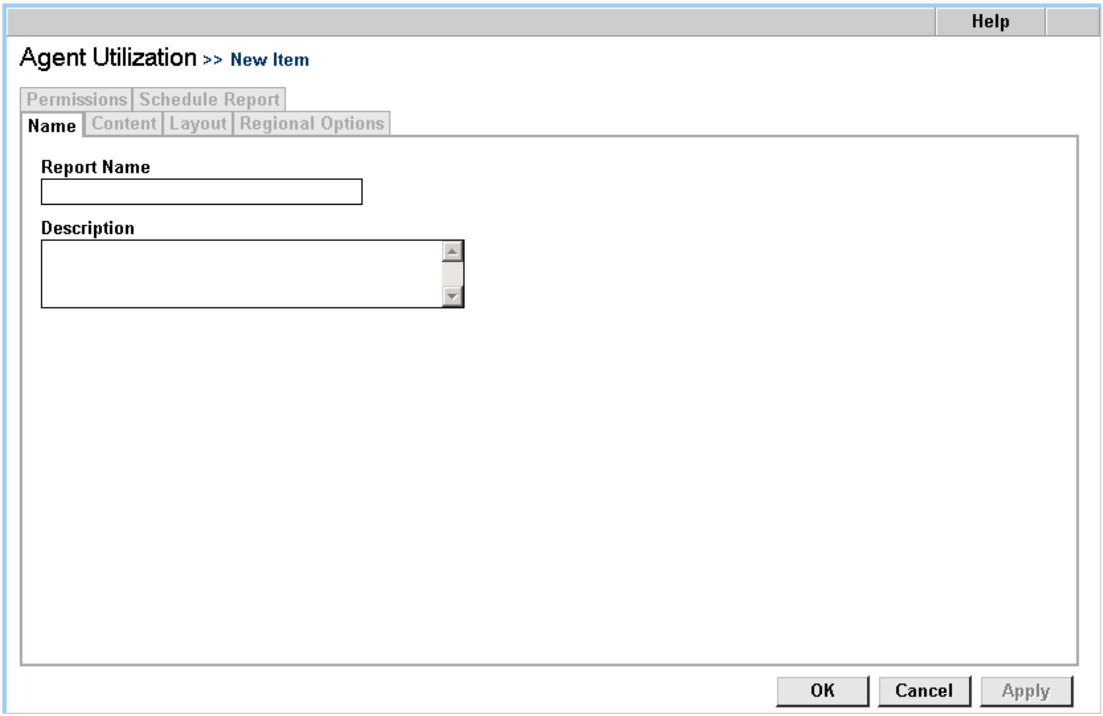


Figure 19-20 Add Report Definition: Name Tab

2. Using the information in Table 19-14, complete the fields.

Table 19-14. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of agent utilization report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of agent utilization report definitions.

3. Click **Content**. The Content tab (Figure 19-21) appears.

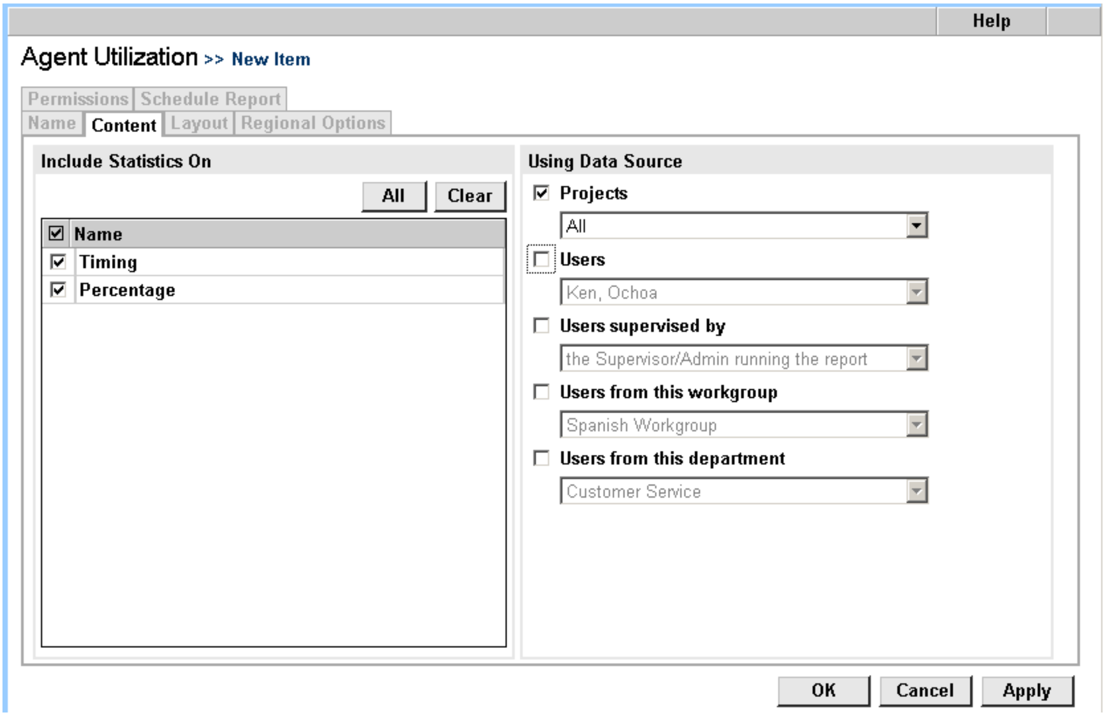


Figure 19-21 Agent Utilization Report: Content Tab

4. Using the information in Table 19-15, complete the fields.

Table 19-15. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Check **Timing** to display the elapsed time each agent spent in each status. Check **Percentage** to display the time, expressed as a relative percentage, that each agent spent in each status.

Table 19-15. Content Tab Fields and Descriptions

Field	Description
Use Data Source	Click the data group source to report: • **Projects**: Choose from all projects defined for the company. • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 19-22) appears.

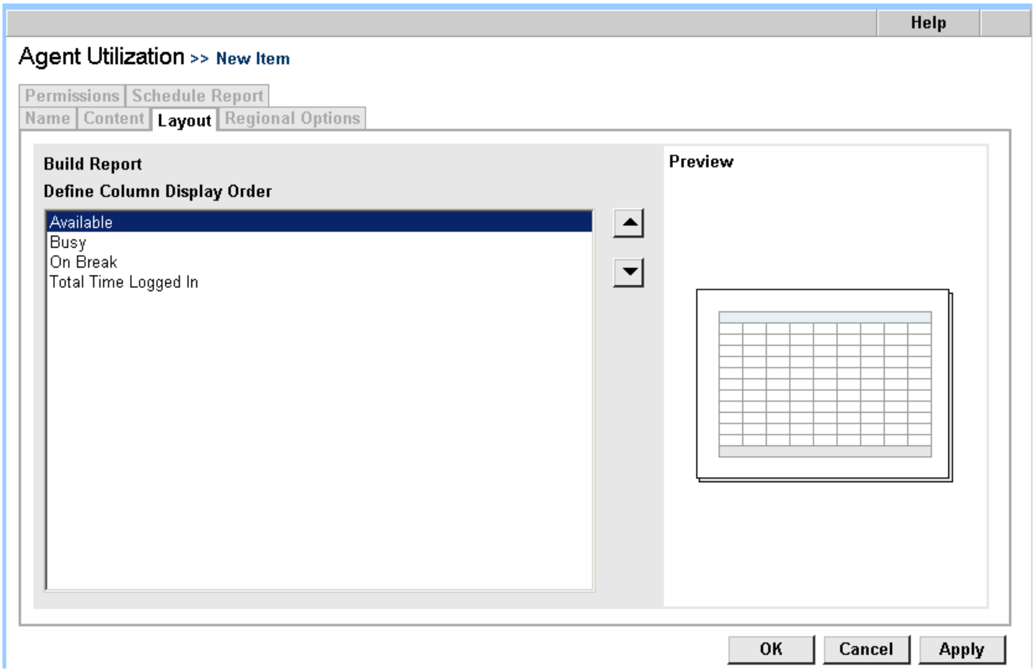


Figure 19-22 Agent Utilization Report: Layout Tab

6. Using the information in Table 19-16, complete the fields.

Table 19-16. Layout Tab Fields and Descriptions

Field	Description
Build Report	Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down.

7. Click **Regional Options**. The Regional Options tab (Figure 19-23) appears.

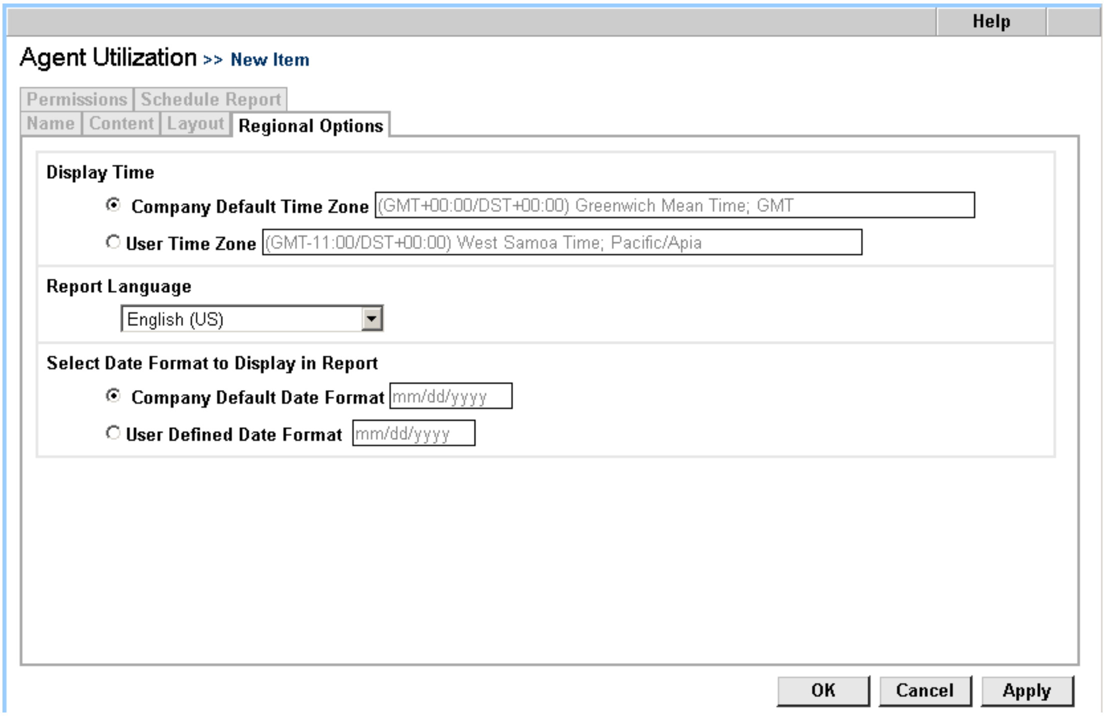


Figure 19-23 Add Report Definition: Regional Options Tab

8. Using the information in Table 19-17, complete the fields.

Table 19-17. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 19-24) appears.

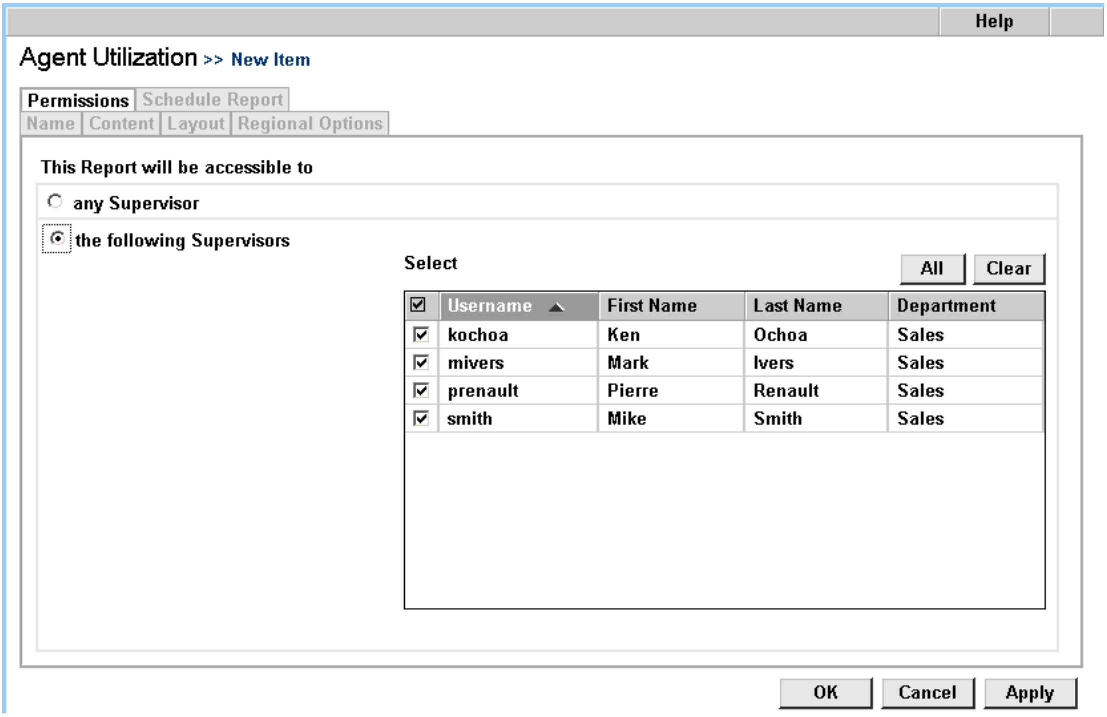


Figure 19-24 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Direct Dialing Statistics Reports

The ***Direct Dialing Statistics Report*** (Figure 19-25) shows non-Workgroup calls where:

- An agent dialed another agent
- Agents called external numbers
- A caller dialed an agent's extension directly

Direct Dialing Statistics >> Direct Dialing Statistics

from 01.12.2002 at 00:00
to 17.12.2002 at 23:59

Report Includes All Projects

Agent Call Processing	TOTAL	**Summary**	TOTAL
Average Talk Time	00:01:12	Total Interactions Received	164
Average Hold Time	00:01:03	Number of Times Interactions Went to Hold	3
Average Process Time per Call	00:01:13	Duration of Interactions	03:21:32

Interaction Type	TOTAL	%
Direct Inbound	58	35.37 %
Direct Outbound	40	24.39 %
Inbound Extension	33	20.12 %
Outbound Extension	33	20.12 %
Total Interactions	**164**	**100 %**

Generated on 17.12.2002 at 18:23 (GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 19-25 Direct Dialing Statistics Report

Report Elements

The following sections describe each element included in the following areas of the Direct Dialing Statistics Report:

- Agent Call Processing
- Summary
- Interaction Type

CCA Supervisors viewing the ***Direct Dialing Statistics Report*** should know that this report shows activity for the entire company. Data presented includes all agents in the selected project or workgroup (not just the agents they supervise).

Agent Call Processing

The **Agent Call Processing** area of the ***Direct Dialing Statistics Report*** shows the average time agents spent in various phases of the interaction. Table 19-18 provides the fields and descriptions for this section of the report.

Table 19-18. Agent Call Processing Area Fields and Descriptions

Item	Description
Average Talk Time	The average number of seconds agents spent talking with callers.
Average Hold Time	The average number of seconds agents kept callers on hold.
Average Process Time Per Call	The average number of seconds agents spent processing a call (including talk time, hold time, and wrap-up time).

Summary

The **Summary** area of the ***Direct Dialing Statistics Report*** shows overview data for interactions received and overview data for interaction wait times. Table 19-19 provides the fields and descriptions for this section of the report.

Table 19-19. Summary Area Fields and Descriptions

Item	Descriptions
Total Interactions Received	The total number of interactions the company received.
Number of Times Interactions Went to Hold	The total number of voice interactions agents placed on hold at any time.

Table 19-19. Summary Area Fields and Descriptions

Item	Descriptions
Duration of Interactions	The total time interactions spent in the system. CCA calculates this as the difference between the time CCA receives the interaction and the conclusion of the interaction.

Interaction Type

The **Interaction Type** area of the ***Direct Dialing Statistics Report*** shows the number of interactions of each media type selected projects or workgroups handled. Table 19-20 provides the fields and descriptions for this section of the report.

Table 19-20. Interaction Type Area Fields and Descriptions

Item	Description
Direct Inbound	The number of calls placed by callers directly to an specific agent plus calls abandoned in the IVR before becoming an ACD call (even if the call was not directed to an agent). A caller using the company directory to reach a specific agent is also counted as a Direct Inbound call.
Direct Outbound	The number of calls agents placed directly to an external phone number.
Inbound Extension	The number of calls agents received from other agents.
Outbound Extension	The number of calls agents placed to other agents
Total Interactions	The total number of direct dialed calls agents placed or handled.

To create a Direct Dialing Statistics Report

1. Click **Reports** > **Agent Profile & Productivity** > **Direct Dialing Statistics** > the **Add** button.

   The Direct Dialing Statistics screen (Figure 19-26) opens to the Name tab.

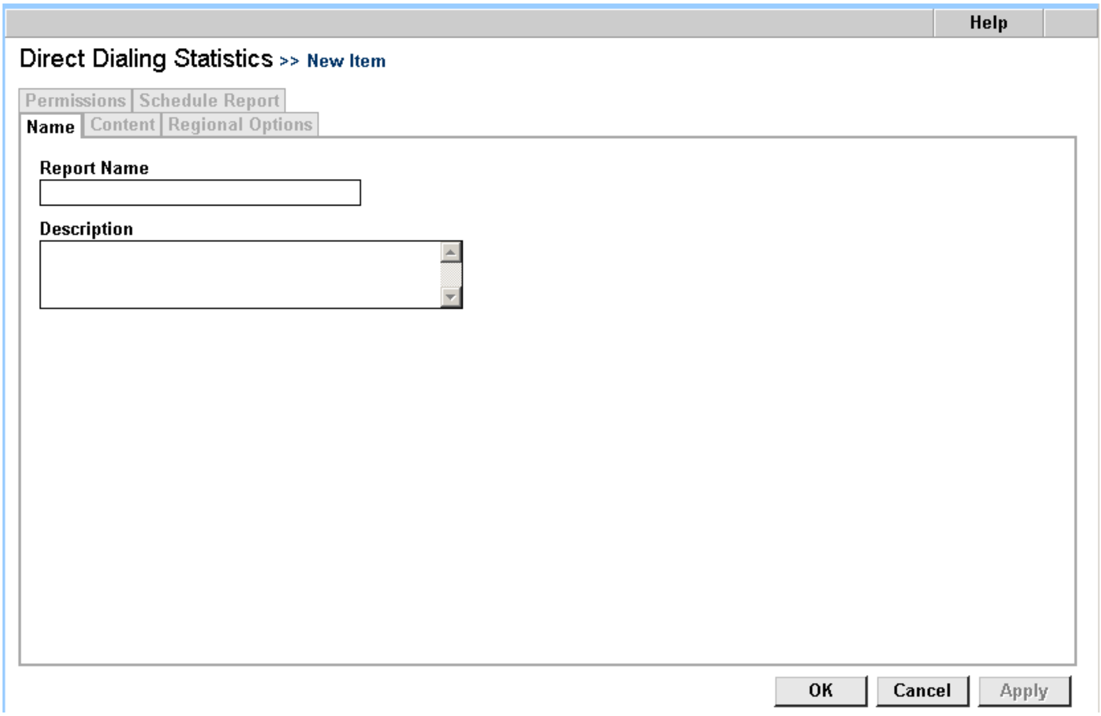


Figure 19-26 Add Report Definition: Name Tab

2. Using the information in Table 19-21, complete the fields.

Table 19-21. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of direct dialing statistics report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of direct dialing statistics report definitions.

3. Click **Content**. The Content tab (Figure 19-27) appears.

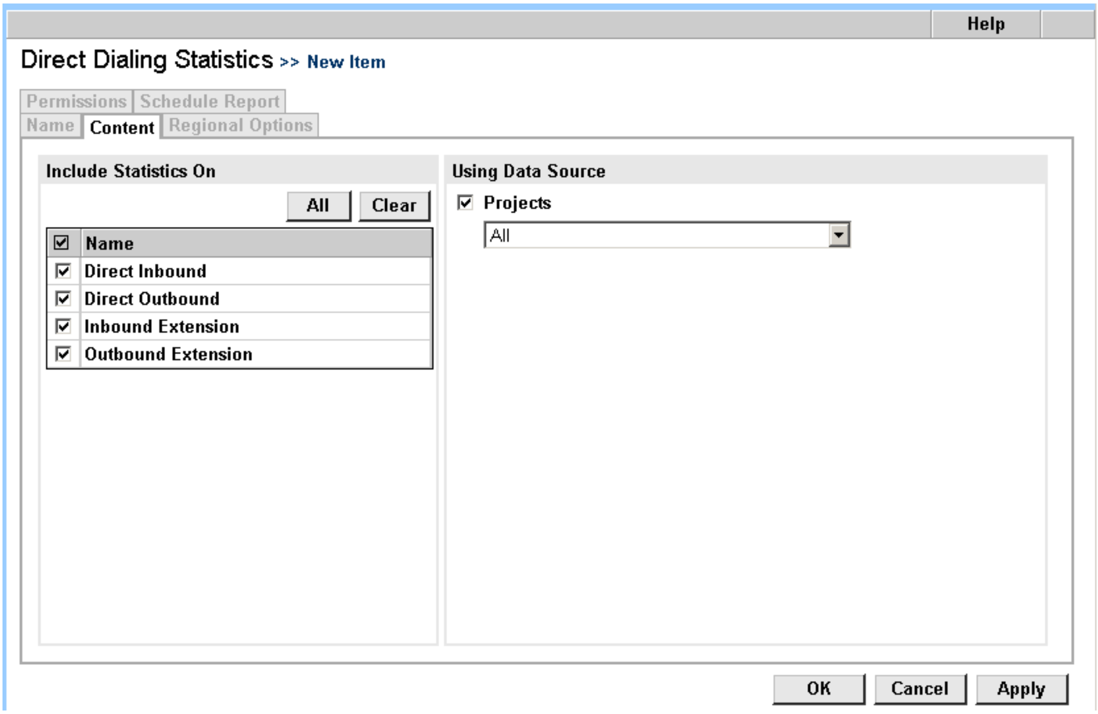


Figure 19-27 Add Report Definition: Content Tab

4. Using the information in Table 19-22, complete the fields.

Table 19-22. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	In the **Include Statistics On** area, check the elements to include in the report. Click **All** to include all elements or click **Clear** to clear all the check boxes. See "Interaction Type" on page 19-31 for a description of each interaction type.
Using Data Source	Select one or all of the projects.

5. Click **Regional Options**. The Regional Options tab (Figure 19-28) appears.

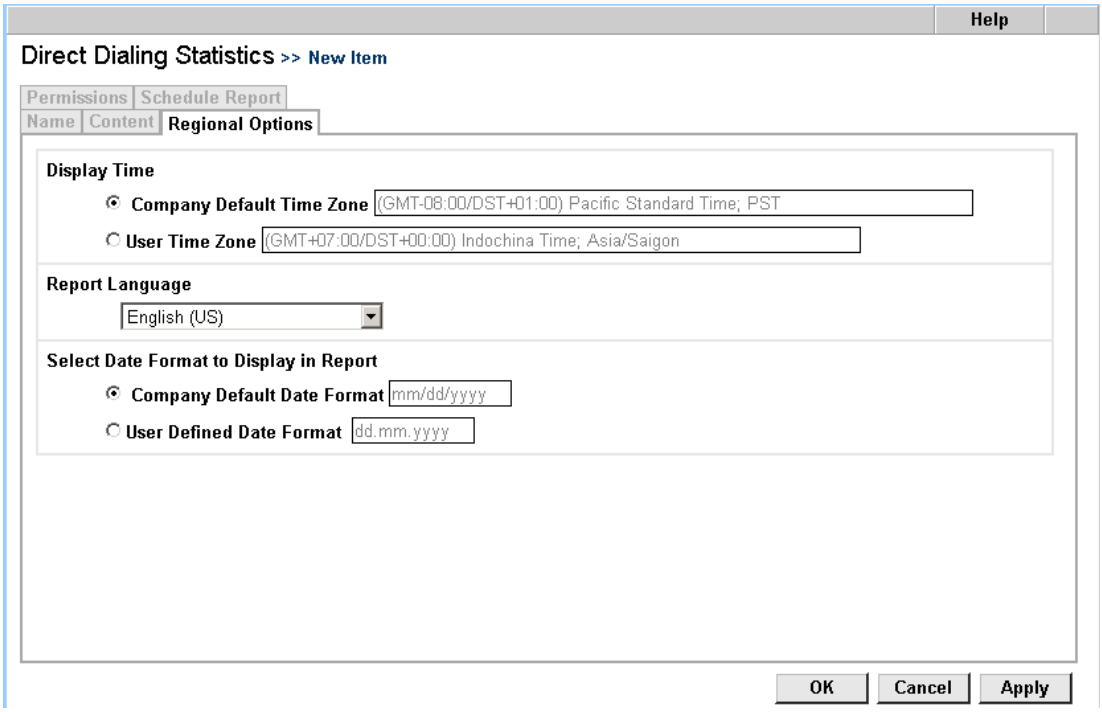


Figure 19-28 Add Report Definition: Regional Options Tab

6. Using the information in Table 19-23, complete the fields.

Table 19-23. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

7. Click **Permissions**. The Permission tab (Figure 19-29) appears.

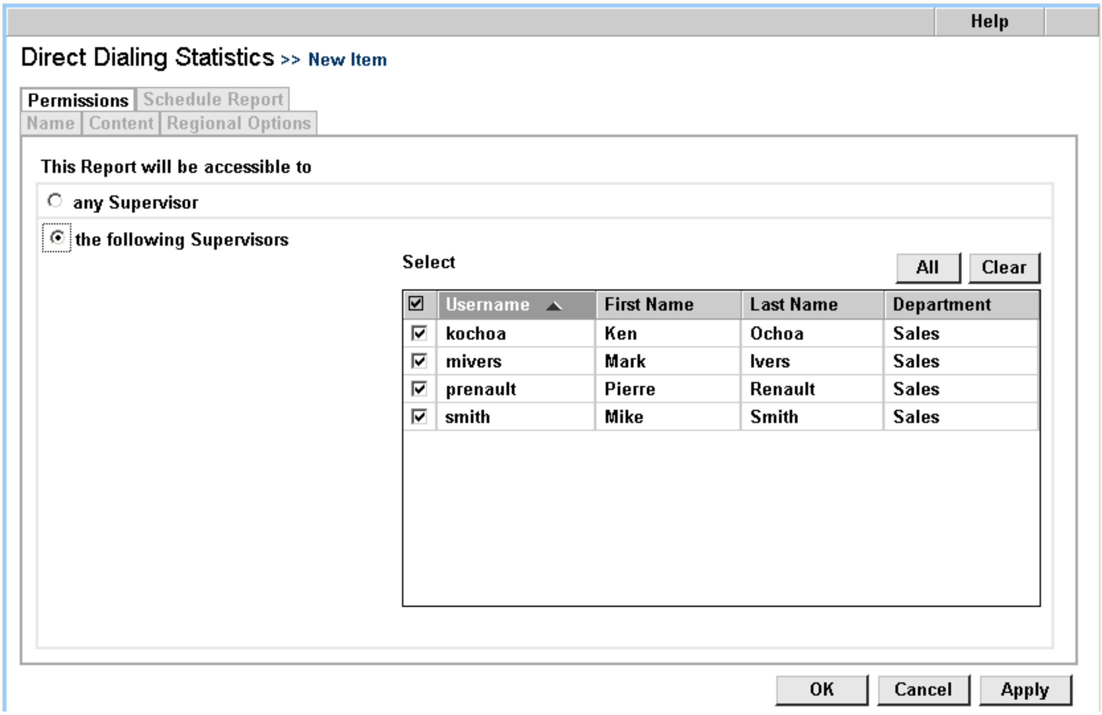


Figure 19-29 Add Report Definition: Permissions Tab

8. Check the supervisors to grant them permission to view and print the report.

   Unchecked supervisors cannot see the report definition in SM.

   Click **All** to include the entire list or click **Clear** to clear all selections.

9. Click **OK**.

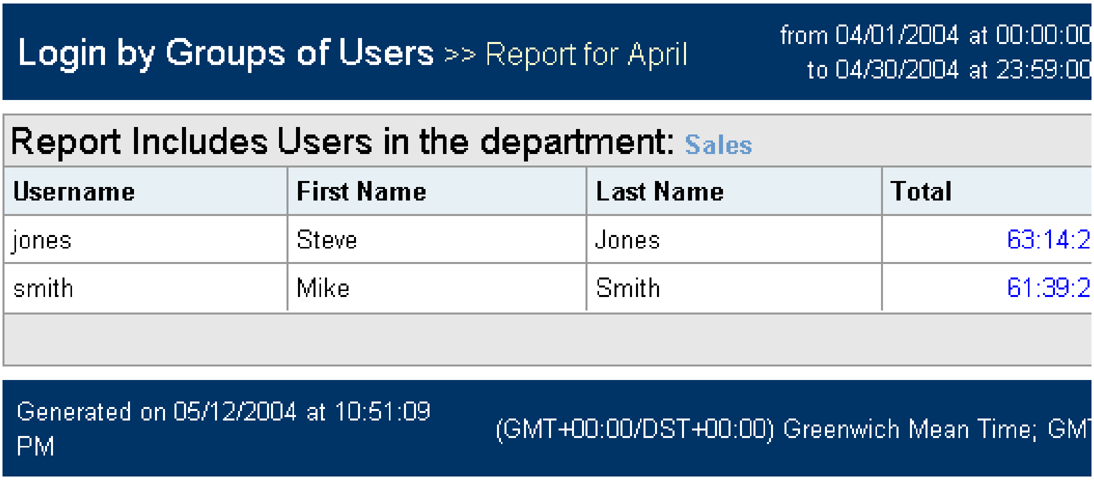
   - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

   - For how to delete a report, see “To delete a report” on page 15-14.

Login by Groups of Users Report

The ***Login by Groups of Users Report*** (Figure 19-30) shows the total time agents and supervisors were logged into IM and SM.

See “Login by User Report” on page 19-43 for the exact time each agent signed into or out of IM or SM.



Login by Groups of Users >> Report for April
from 04/01/2004 at 00:00:00
to 04/30/2004 at 23:59:00

Report Includes Users in the department: Sales

Username	First Name	Last Name	Total
jones	Steve	Jones	63:14:2
smith	Mike	Smith	61:39:2

Generated on 05/12/2004 at 10:51:09 PM (GMT+00:00/DST+00:00) Greenwich Mean Time; GM

Figure 19-30 Login by Groups of Users Report

CCA does not calculate data for a user until the user logs out of IM or SM. CCA excludes users currently logged in from the ***Summary Login Report***.

In addition, CCA includes users in the report only if the user logged out on a day falling within the requested report date range.

To create a Login by Groups of Users Report

1. Click **Reports** > **Agent Profile & Productivity** > **Login by Groups of Users** > the **Add** button.

   The Login by Groups of Users screen (Figure 19-31) opens to the Name tab.

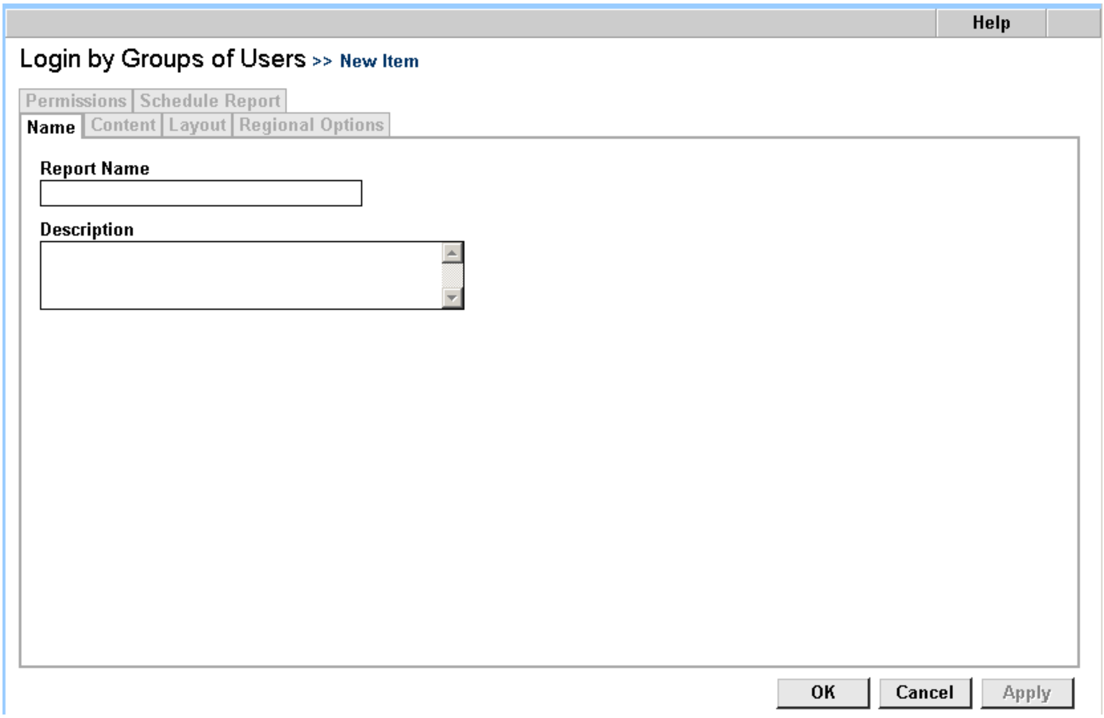


Figure 19-31 Add Report Definition: Name Tab

2. Using the information in Table 19-24, complete the fields.

Table 19-24. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Login by Groups of Users Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Login by Groups of Users Report definitions.

3. Click **Content**. The Content tab (Figure 19-32) appears.

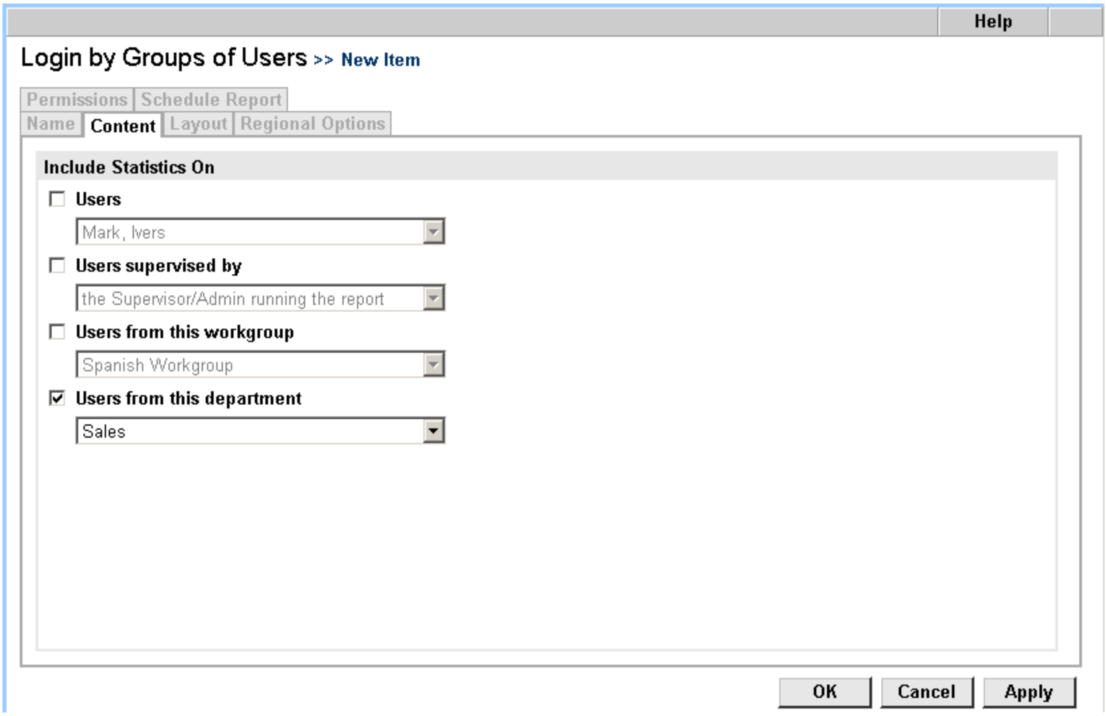


Figure 19-32 Login by Groups of Users Report: Content Tab

4. Using the information in Table 19-25, complete the fields.

Table 19-25. Content Tab

Field	Description
Include Statistics On	Click the data group source to report: • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 19-33) appears.

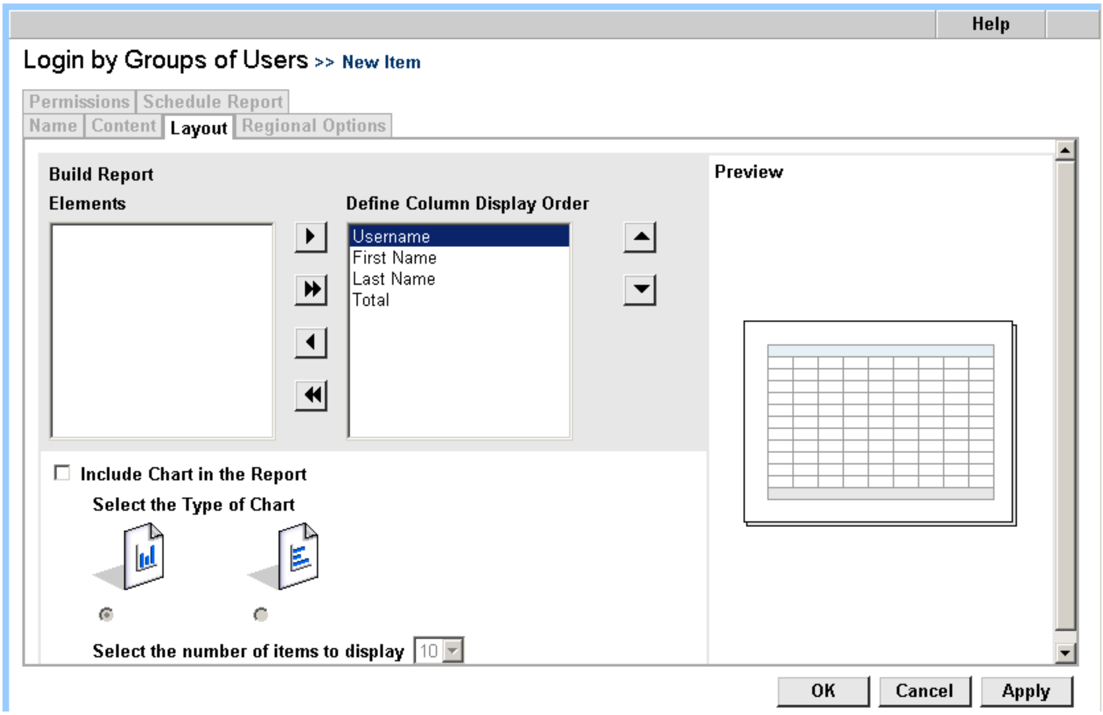


Figure 19-33 Login by Groups of Users Report: Layout Tab

6. Using the information in Table 19-26, complete the fields.

Table 19-26. Layout Tab Fields and Descriptions

Field	Description
Build Report	In the **Elements** box, include elements in the report by clicking the item and then clicking the right arrow ( ) or clicking the double arrows ( ) to include all. Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down.

Table 19-26. Layout Tab Fields and Descriptions

Field	Description
Include Chart in the Report	Check **Include Chart in the Report** to include a graphical representation of the report information in the generated report. Under **Select the Type of Chart**, click the type of chart to include in the report. Verify the report layout in the **Preview** area. From the **Select the number of items to display** drop-down menu, select the number of items to include in the graphical portion of the report. **Note**: When making the selection of number of items to include in the graphical portion of the report, the graph creates its own filter showing only the agents with the longest login times. To remedy this, select a number corresponding with the total number of agents assigned to the company.

7. Click **Regional Options**. The Regional Options tab (Figure 19-34) appears.

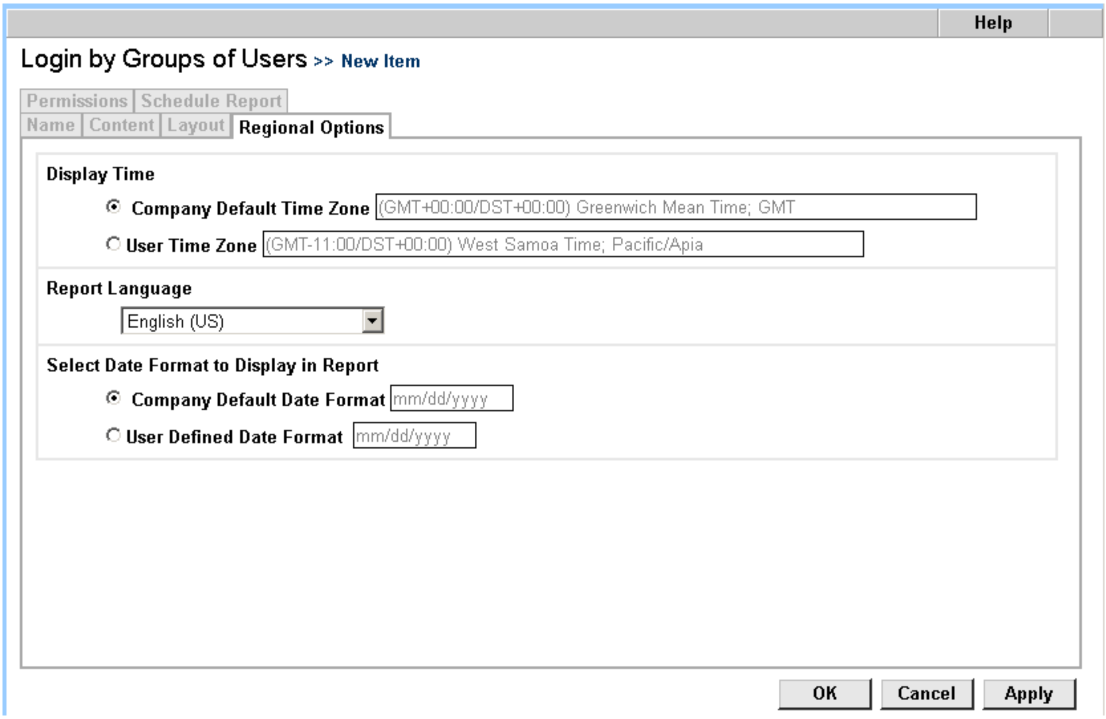


Figure 19-34 Add Report Definition: Regional Options Tab

8. Using the information in Table 19-27, complete the fields.

Table 19-27. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 19-35) appears.

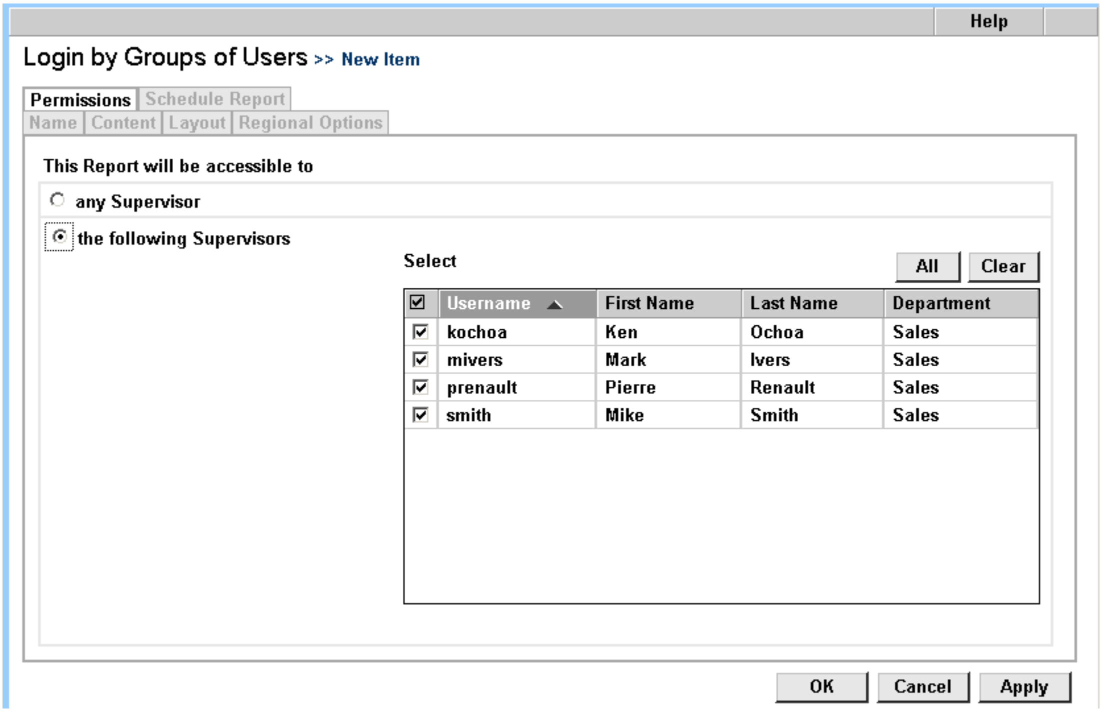


Figure 19-35 Add Report Definition: Permissions Tab

10. Check the Supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Login by User Report

The ***Login by User Report*** (Figure 19-36) shows the total time agents and supervisors were logged into IM and SM. The report shows:

- The **Login Date** and **Login Time** of each agent session
- The **Duration** of each login session
- The **Total** time the agent was logged into IM (sum of all session durations)

Login by User >> Login By User

from 08.12.2002 at 00:00
to 17.12.2002 at 23:59

Report Includes Users: Carrion, Cobb, Tim, Jones, Jonathon

Last Name	Username	First Name	Duration	Login Date	Login Time	Total Time Logged In
Carrion	debbie	Debbie	00:03:28	11.12.2002	05:55:04 PM	00:03:28

Last Name	Username	First Name	Duration	Login Date	Login Time	Total Time Logged In
Jones	johns2	Jonathon	00:00:00		00:00:00	00:00:00

Last Name	Username	First Name	Duration	Login Date	Login Time	Total Time Logged In
Cobb	timadmin	Tim	00:06:20	09.12.2002	06:12:06 PM	00:06:20
Cobb	timadmin	Tim	00:10:37	09.12.2002	06:20:43 PM	00:16:57
Cobb	timadmin	Tim	00:00:17	10.12.2002	05:11:47 PM	00:17:14
Cobb	timadmin	Tim	00:14:17	10.12.2002	05:12:28 PM	00:31:31
Cobb	timadmin	Tim	00:00:26	10.12.2002	05:27:04 PM	00:31:57
Cobb	timadmin	Tim	00:15:21	10.12.2002	05:27:43 PM	00:47:18
Cobb	timadmin	Tim	00:00:10	10.12.2002	05:43:24 PM	00:47:28
Cobb	timadmin	Tim	00:13:29	10.12.2002	05:43:48 PM	01:00:57
Cobb	timadmin	Tim	01:07:47	10.12.2002	05:57:19 PM	02:08:44
Cobb	timadmin	Tim	00:07:22	10.12.2002	07:15:45 PM	02:16:06
Cobb	timadmin	Tim	00:00:45	10.12.2002	07:23:41 PM	02:16:51

Generated on 17.12.2002 at 18:42

(GMT-08:00/DST+00:00) Pacific Standard Time; PST

Figure 19-36 Login by User Report

To create a Login by User Report

1. Click **Reports** > **Agent Profile & Productivity** > **Login by User** > the **Add** button.

   The Login by User screen (Figure 19-37) opens to the Name tab.

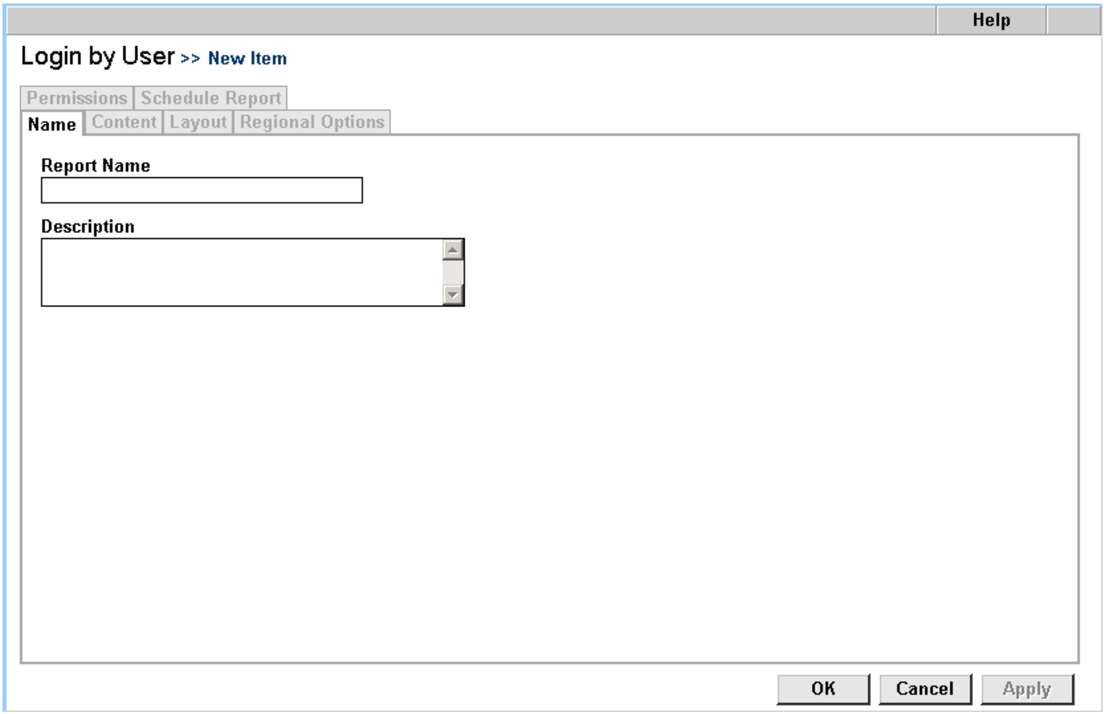


Figure 19-37 Add Report Definition: Name Tab

2. Using the information in Table 19-28, complete the fields.

Table 19-28. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a name for this report. The name appears on each page of the report and in the **Name** column of the list of Login by User Report definitions.

Table 19-28. Name Tab Fields and Descriptions

Field	Description
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Login by User Report definitions.

3. Click **Content**. The Content tab (Figure 19-38) appears.

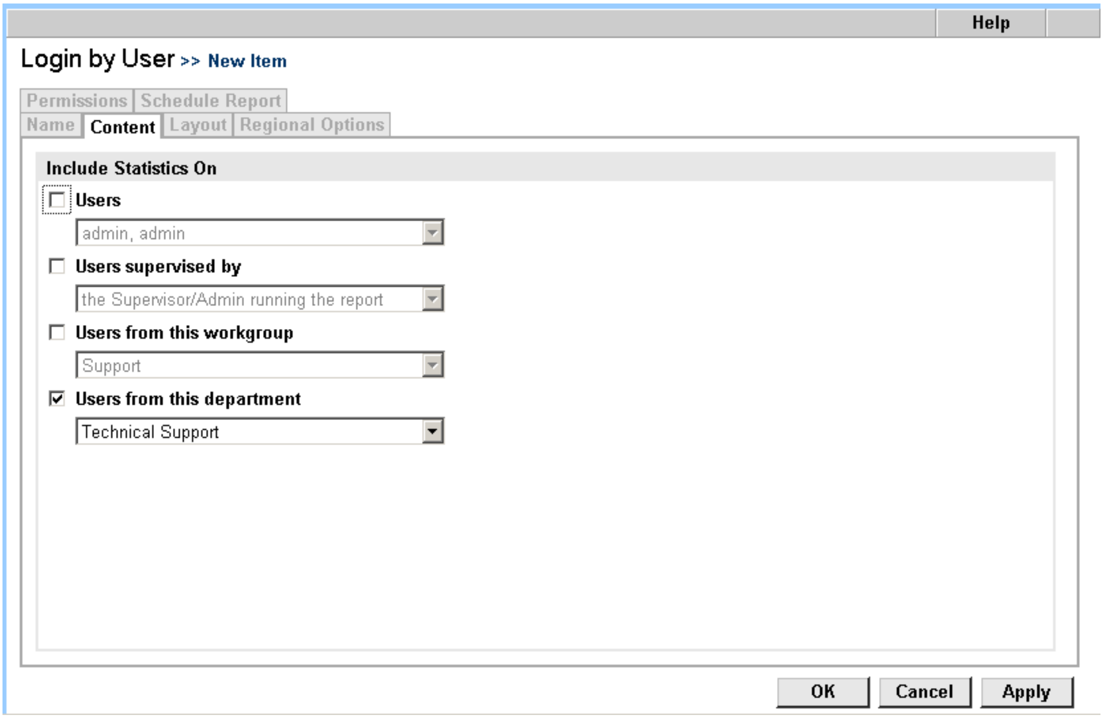


Figure 19-38 Login by User Report: Content Tab

4. Using the information in Table 19-29, complete the fields.

Table 19-29. Content Tab Fields and Descriptions

Field	Description
Using Data Source	Click the data group source to report: • **Users**: Choose selected agents, supervisors, and administrator accounts defined for the company. • **Users supervised by**: Report on agents who are supervised by selected supervisors or administrators. • **Users from this workgroup**: Report on users in a specific workgroup. • **Users from this department**: Report on selected departments.

5. Click **Layout**. The Layout tab (Figure 19-39) appears.

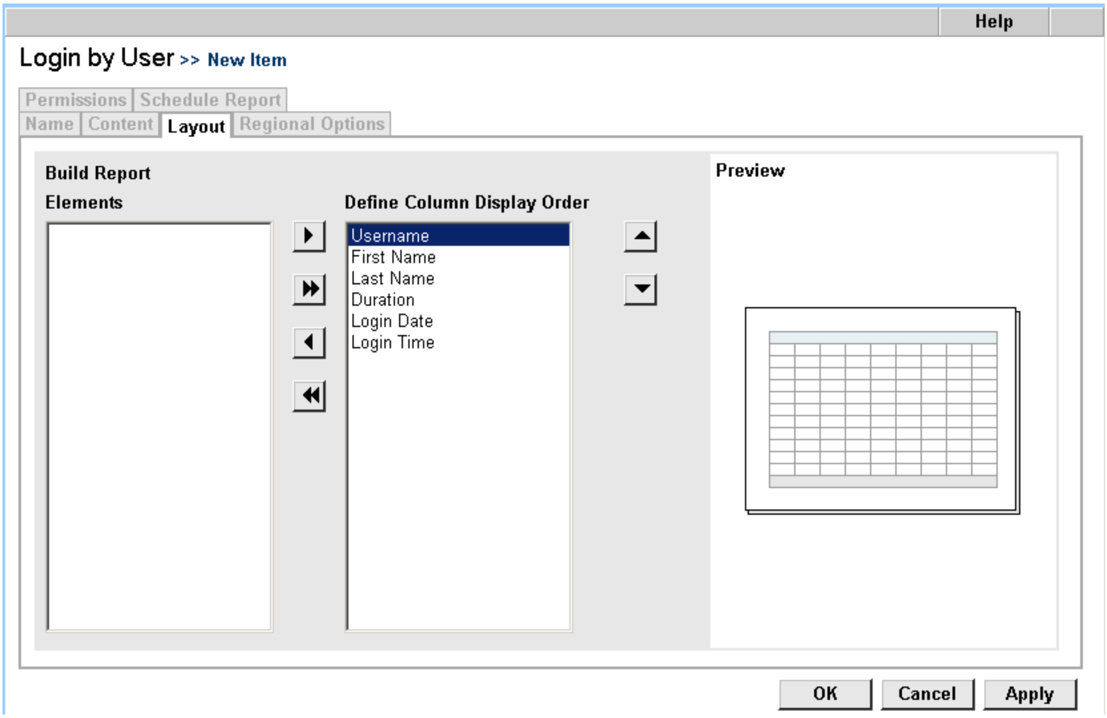


Figure 19-39 Login by User Report: Layout Tab

6. Using the information in Table 19-30, complete the fields.

Table 19-30. Layout Tab Fields and Descriptions

Field	Description
Build Report	In the **Elements** box, include elements in the report by clicking the item and then clicking the right arrow ( ) or clicking the double arrows ( ) to include all. Order the report columns by clicking an included element and then clicking the up arrow ( ) to move a column up or clicking the down arrow ( ) to move the column down.

7. Click **Regional Options**. The Regional Options tab (Figure 19-40) appears.

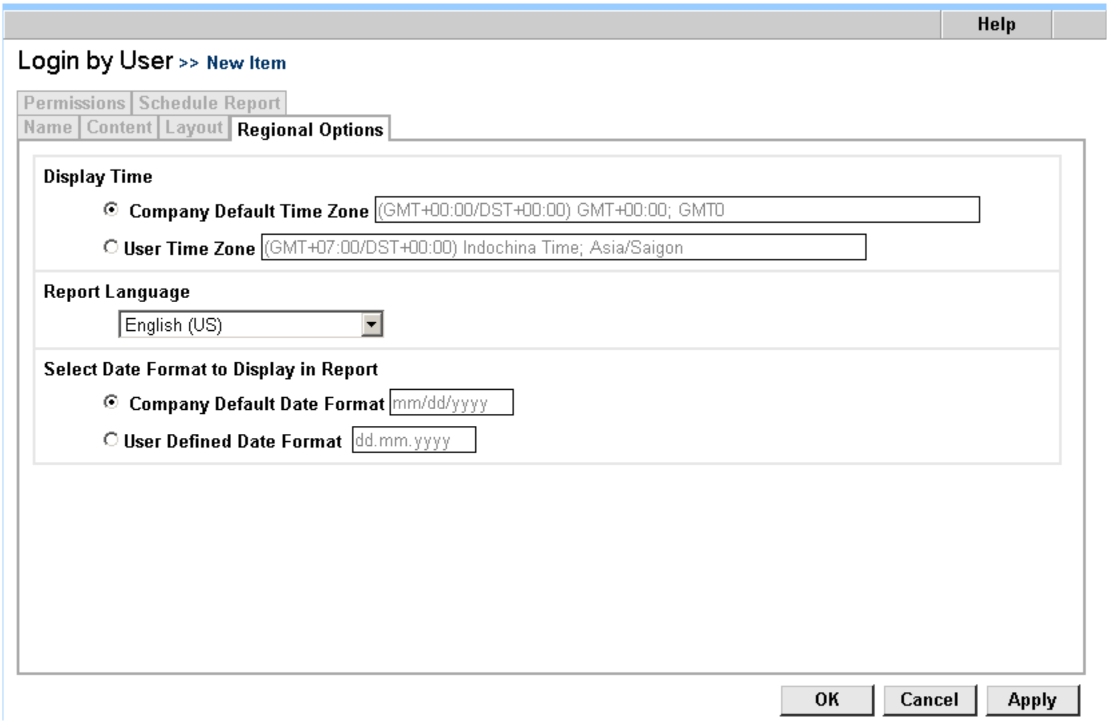


Figure 19-40 Add Report Definition: Regional Options Tab

8. Using the information in Table 19-31, complete the fields.

Table 19-31. Regional Options Tab Fields and Descriptions

Choose...	To Display...
Company Default Time Zone	All times using the indicated time zone set for the company.
User Time Zone	All times using the indicated time zone set for your workstation.
Report Language	All report contents in the language selected.
Company Default Date Format	All dates using the indicated format set for the company.
User Defined Date Format	All dates using the indicated format set for your workstation.

9. Click **Permissions**. The Permissions tab (Figure 19-41) appears.

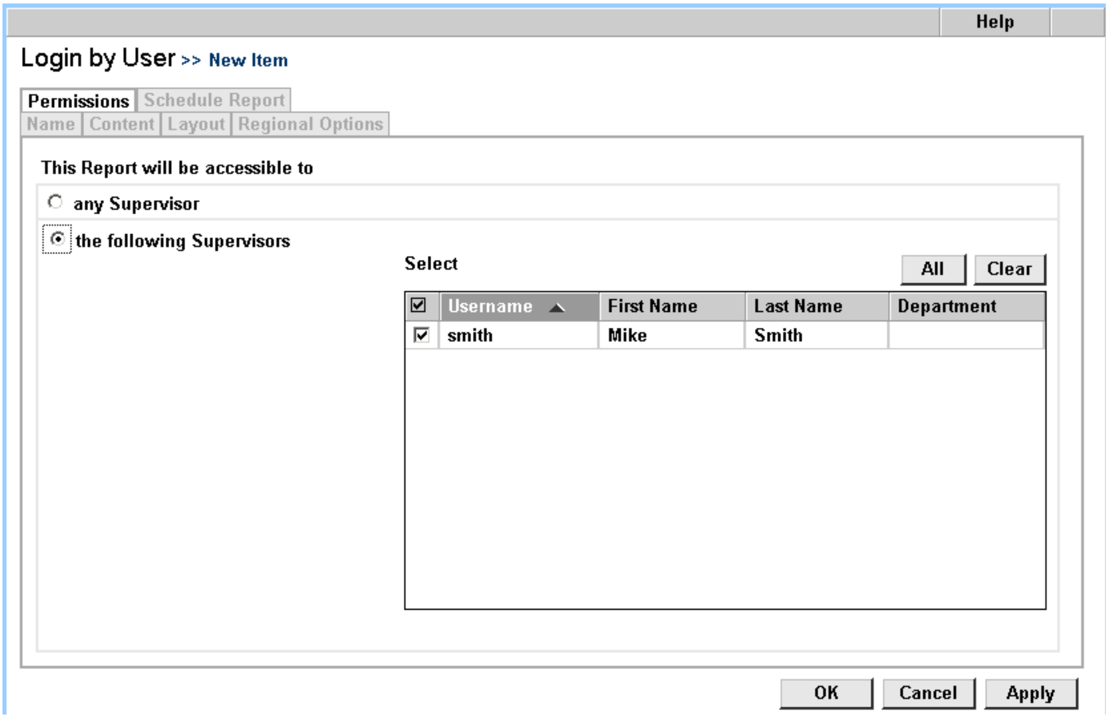


Figure 19-41 Add Report Definition: Permissions Tab

10. Check the supervisors to grant them permission to view and print the report.

    Unchecked supervisors cannot see the report definition in SM.

    Click **All** to include the entire list or click **Clear** to clear all selections.

11. Click **OK**.

    - For how to view and print a report, see "Viewing and Printing Standard Reports" on page 15-6.

    - For how to delete a report, see "To delete a report" on page 15-14.

20

The Project Reports

Project Segments Report (formerly Project Key Statistics Report)

The ***Project Segments Report*** (Figure 20-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Project Key Statistics >> Every Project

from 03/01/2003 at 00:00:00
to 04/05/2004 at 23:59:00

Report Includes All Projects

Interaction Summary	TOTAL
Total Interactions	63
Total Talk Time	06:15:49
Average Talk Time	00:06:22
Total Hold Time	00:31:20
Average Hold Time	00:04:28
Total Queue Time	00:28:03
Average Queue Time	00:00:27
Longest Queue Time	00:25:51
Shortest Queue Time	00:00:00
Total Wrap-up Time	00:00:00
Average Wrap Up Time	00:00:00

Interaction Type Summary	TOTAL	%
Inbound Calls	20	31.75 %
Outbound Calls	0	0.00 %
Chat	43	68.25 %
Workgroup Email	0	0.00 %
Web Callback	0	0.00 %
Predictive	0	0.00 %
Preview	0	0.00 %
Total	63	100 %

Generated on 04/05/2004 at 08:34:00 PM

(GMT+00:00/DST+00:00) Greenwich Mean Time; GMT

Figure 20-1 Sample Project Segments Report

Report Elements

Table 20-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 20-1. Project Segments Report Fields

Item	Description
Total Interactions	The total number of interactions that occurred for the report time range.
Total Talk Time	The total time that agents spent on interactions for the report time range.
Average Talk Time	The average time agents spent on interactions.
Total Hold Time	The total time all customers spent on hold for the report time range.
Average Hold Time	The average time customers spent on hold for the time report time range.
Total Queue Time	The total time all customers spent in a queue for the report time range.
Average Queue Time	The average time customers spent in a queue for the report time range.
Longest Queue Time	The longest time any customer spent in a queue for the report time range.
Shortest Queue Time	The shortest time any customer spent in a queue for the report time range
Total Wrap-up Time	The total time for all agents spent on wrapping-up a concluded interaction.
Average Wrap Up Time	The average time agents spent on wrapping-up a concluded interaction.
Direct Calls	The total number of calls made directly to an agent. **Note**: If a Direct Inward Dialing number (a DNIS) was set for an agent (see Options > Agents > Phone > Direct Inward Dialing), Direct Inbound calls are not included in reports unless a billing project is also set for the agent.

Table 20-1. Project Segments Report Fields

Item	Description
	Set billing projects for agents in two ways: • AM > Options > Agents > Controls and Restrictions tab > Project Billing check box. IM > Configuration dialog box > General tab > Project Billing check box.
Outbound Calls	The total number of calls agents made directly to outside numbers.
Chat	The total number of chat interactions occurring during the report time range.
Workgroup Email	The total number of workgroup emails made during the report time range.
Web Callback	The total number of Web callbacks made during the report time range.
Predictive	The total number of predictive calls made during the report time range.
Preview	The total number of preview calls made during the report time range.

To create a Project Segments Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.
2. The Add Report Definition screen (Figure 20-2) opens to the Name tab.

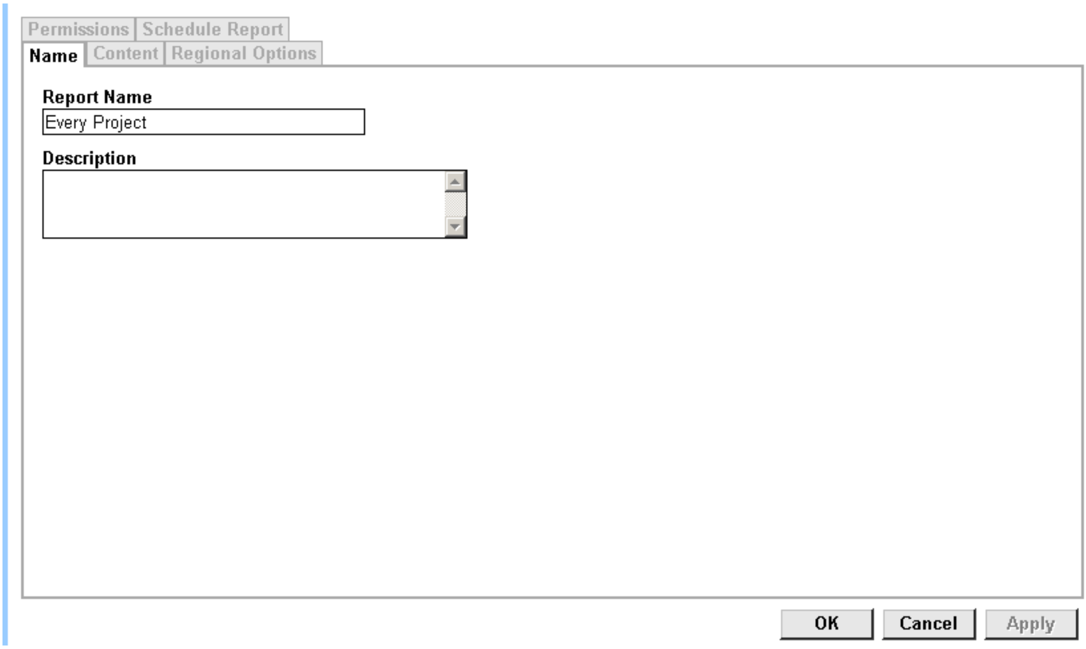


Figure 20-2 Add Report Definition: Name Tab

3. Using the information in Table 20-2, complete the fields.

Table 20-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 20-3) appears.

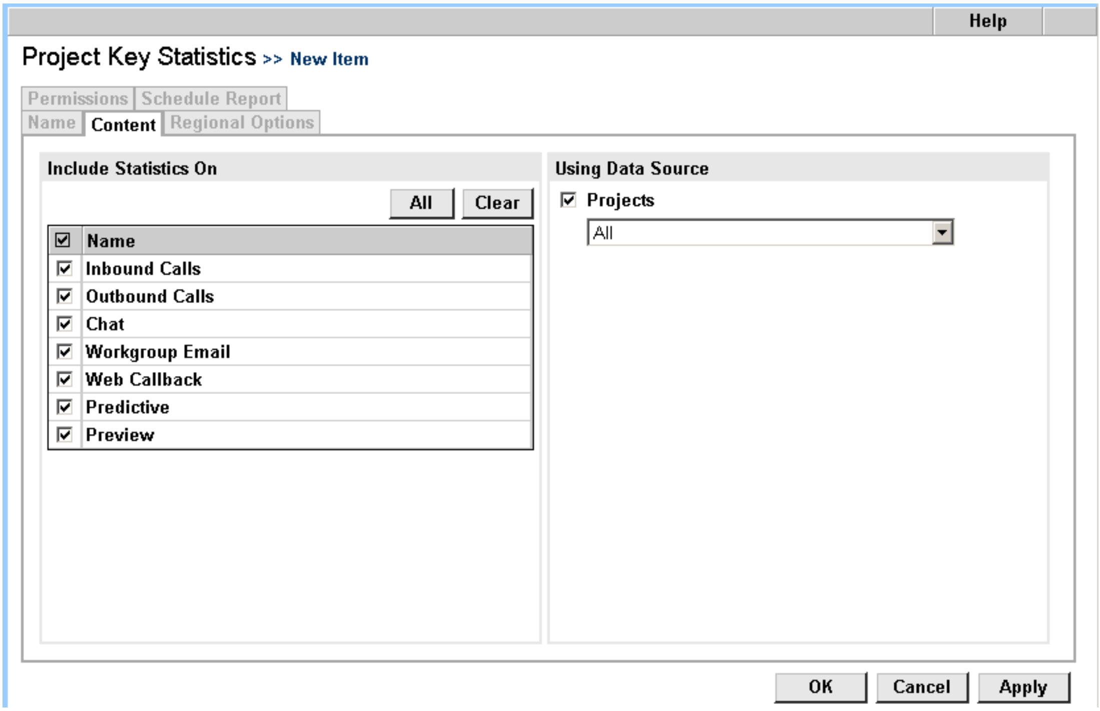


Figure 20-3 Project Segments Report: Content Tab

5. Using the information in Table 20-3, complete the fields.

Table 20-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 20-4) appears.

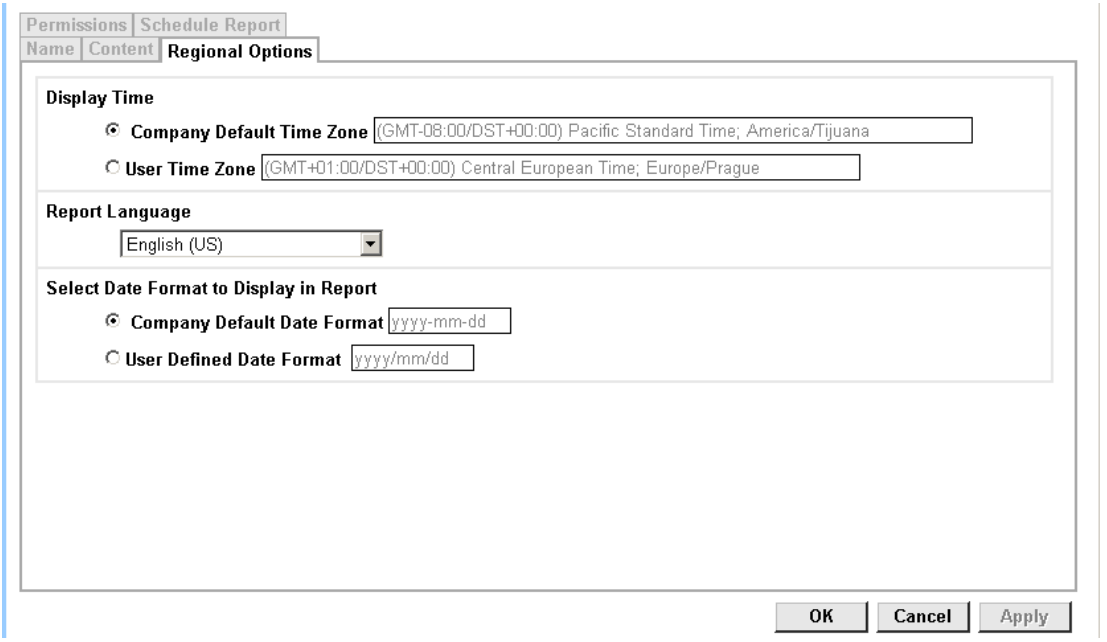


Figure 20-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 20-4, complete the fields.

Table 20-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 20-5) appears.

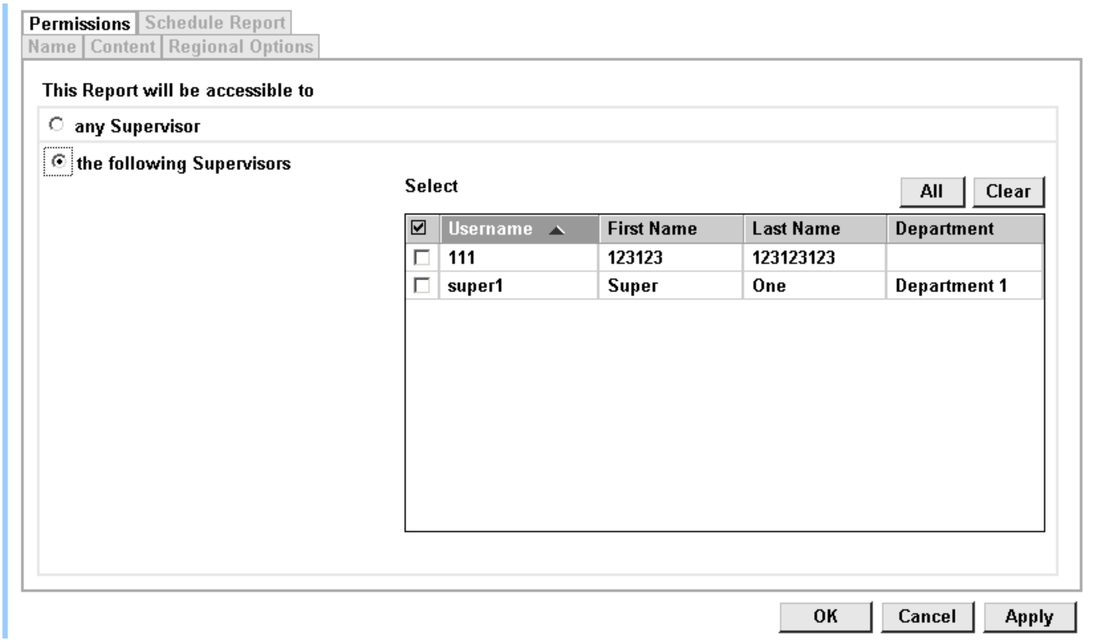


Figure 20-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Customizing Application Interfaces (Service Provider Edition only)

CCA allows you to customize almost any text that appears on Interaction Manager, Supervision Manager, or Administration Manager screens.

While you cannot change the function of the controls and fields in CCA (with the exception of the customizable Interaction Manager screen, see Appendix B, “Extending the Interaction Manager”), you can replace the titles, messages, and labels on the CCA user interfaces so that they make the most sense to your Agents, Supervisors, and Administrators.

Changes to the CCA workstation interfaces are system-wide. This means, your changes affect ***all*** companies in the system.

Interface Object Keys and Resource Bundles

Interface Object Keys contain the text that CCA displays to users in the Interaction Manager, Supervision Manager, and Administration Manager programs:

- Menu names
- Menu items
- Labels for check boxes, radio buttons, list boxes, and so on

A ***Resource Bundle*** is a file where CCA stores groups of related Interface Object Keys. For example, CCA stores most of the configurable text for Interaction Manager screens in a Resource Bundle called “Interaction Manager.”

Customizing Interface Text

There are three general steps to customizing interface text:

1. Find the text that to change in the resource bundle file where CCA stores the text.

2. Make any changes.

3. Generate new resource bundle files.

Remember that any text change you make applies to every company.

Finding and Changing Text

In the Chat screen of the Interaction Manager program there is a “Collaborate” button. To change the name of this button to “View Customer’s Browser,” find out which resource bundle file contains the text “Collaborate.”

1. Log into AM with the ***netadmin*** account (see “Starting and Logging In” on page 3-3) and view the list of companies.

   In the top right corner of the screen is a menu called “**Go To...**” (Figure A-1).

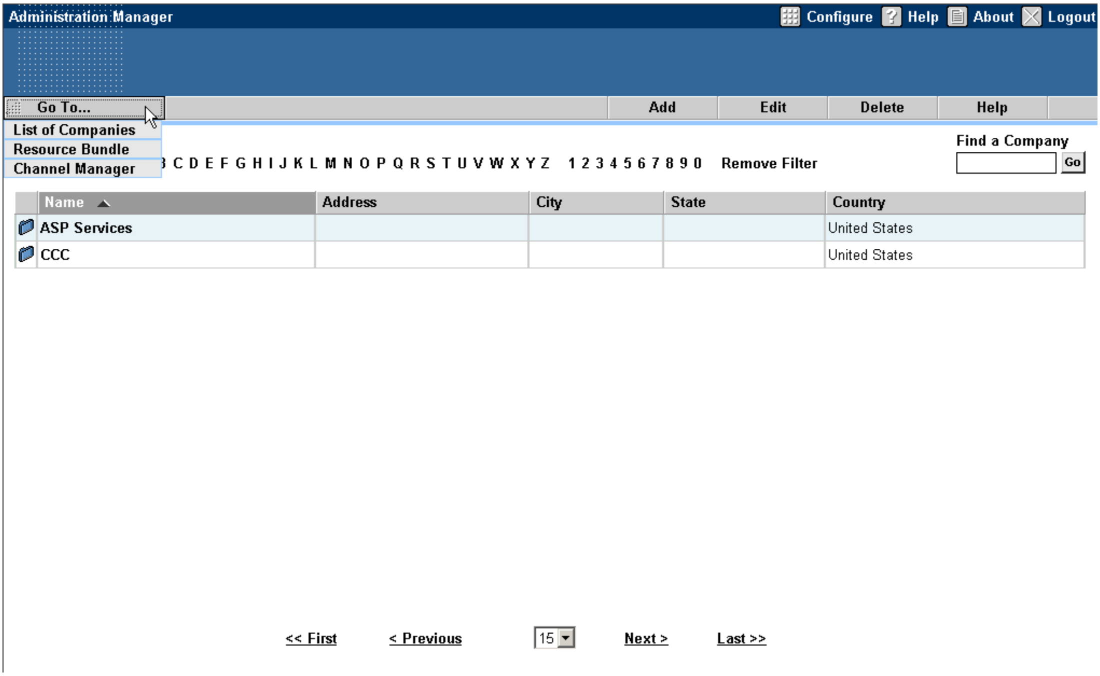


Figure A-1. “Go To...” Menu

2. Click the Go To menu and choose **Resource Bundle**.

   The Resource Bundle dialog box (Figure A-2) opens.

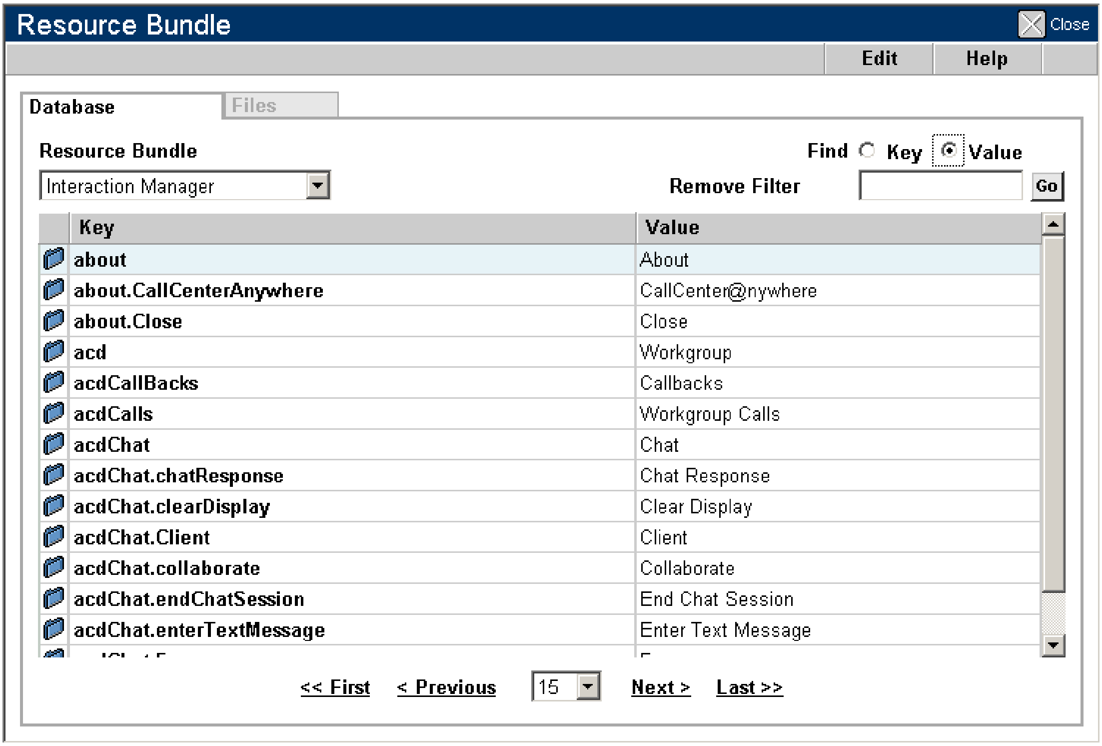


Figure A-2. Resource Bundle Dialog Box - Database Tab

3. To modify a button name in IM, click the Resource Bundle list box, scroll down the list and choose **Interaction Manager**. (This is the resource file where CCA stores “general” text for IM.)

   Most of the resource files have obvious names. For example, a resource bundle called “Agent Status” contains agent status. However, not all of the customizable text for an application is in the same resource bundle. CCA might distribute customizable text for IM in approximately 10 different files.

4. At the top right of the Resource Bundle dialog box, click the **Value** button.

5. In the text box under the Key and Value buttons, type the word **Collaborate**, then click the **Go** button or press return.

The search field also does a default substring search, so:
- Col matches Collaborate and Color in Graph.
- You can also use the “%” as a wildcard, so %uba matches Cuba and Aruba.

In this example, the search for **Collaborate** had two results. The first string is the name of the button. The second string is the mouse over text for the button.

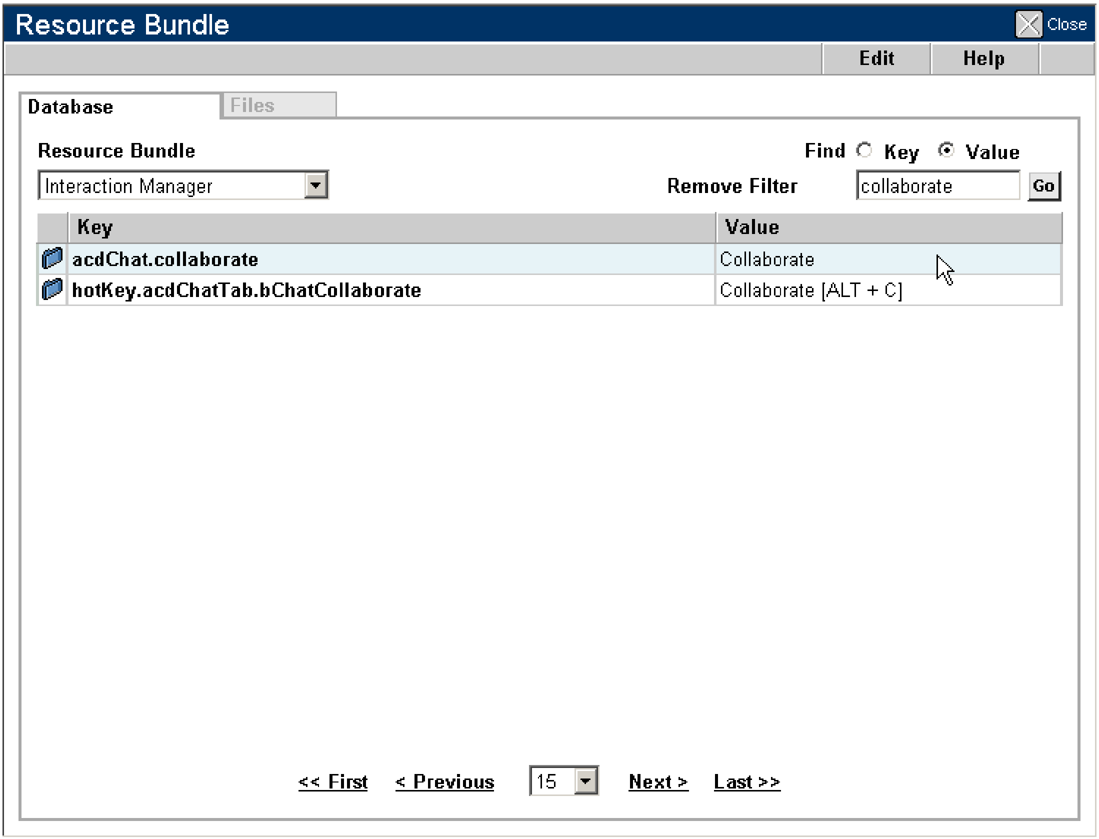


Figure A-3. Resource Bundle Dialog Box - Display Search Results

6. Double-click on the first row of the search results (acdChat.collaborate). The Key page appears.

   Click the Value column and enter the new text for the button. (You can enter new text for any of the languages CCA supports.)

When you finish entering the new text for the button, click the **OK** button.

Use the steps shown above to make any other text changes:

- Use the Resource Bundle list box in the Database tab to select the resource bundle file containing your text. You might have to search in a few different files to find the text to change, but most of the resource bundle files have fairly obvious names.
- Change the text in the Key page and save your changes.

Customizing Text in Administration Manager

There is a shortcut for finding customizable text, but it is only supported in the AM program.

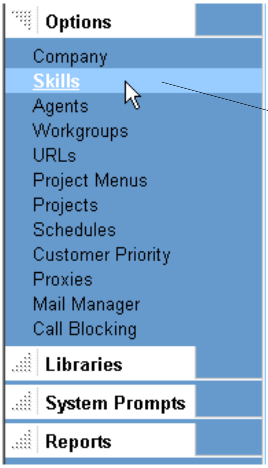
To customize text in AM

1. Find the text to change. For example, in the AM Navbar, change the hyperlink “Skills” to “Talent”:

2. Click and hold the left mouse button on the word “Skills,” and while holding the mouse button down, press the “Control + shift + R” keys.

   The Resource Bundle dialog box opens, and the resource bundle file containing the text “Skills” is selected by default.

This shortcut makes it easy to find which of the AM resource bundle files contains the text to edit. Follow the steps in the previous section to find the “Skills” key/value row and make your text changes.



Click on the text to change.
- Hold down the left mouse button, while you press “Control+Shift+R.”

You can use this technique to find any customizable text in the Administration Manager program

Figure A-4. Using the “Control-Shift-R” Method

Generating New Resource Bundle Files

After making all text file changes, generate new resource bundle files containing the changes:

1. Open the Resource Bundle dialog box and select the **Files** tab.

2. In the Resource Bundle list box, select the resource bundle file that you modified.

   If you modified text in several different resource bundle files, you could select **All** in the Resource Bundle list box. However, depending on your network speed, Web server configuration, database resources, and so on, it could take a long time to generate all of the resource bundle files. In general it is faster to regenerate only the files you modified.

3. In the Language list box, select the language for which you created new text, or select **All**.

4. Click the **Generate** button.

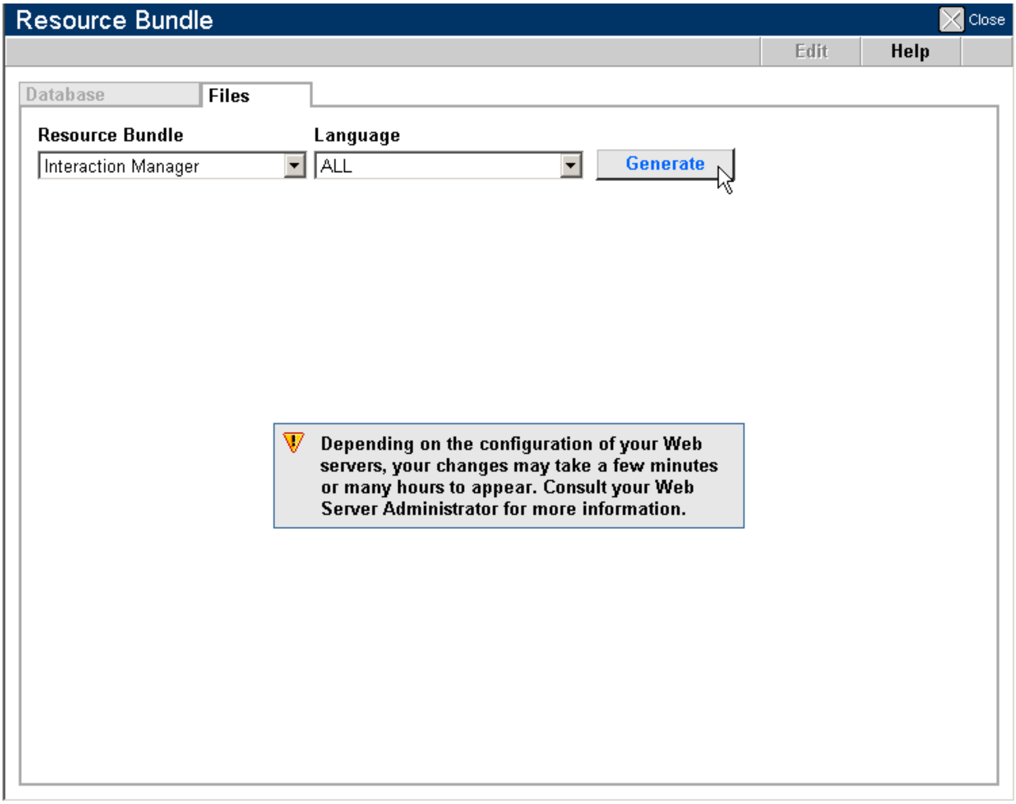


Figure A-5. Resource Bundle Dialog Box - Files Tab

CCA generates new resource bundle files containing your changes.

The next time users login, they will see your changes.

Extending the Interaction Manager

You can customize the Interaction Manager so that it integrates with other applications, such as a CRM or Help Desk. This appendix describes how to perform the following tasks:

- Adding a Button and a Screen to the Interaction Manager
- Launching an External Application
- Capturing Contact Information from Predictive and Preview Interactions

Adding a Button and a Screen to the Interaction Manager

Add a control button to the IM interface to give agents access to a custom screen. Then, access and display interaction information to agents in that custom screen.

In IM, you can:

- Display an additional control button with a unique label
- Display an HTML file
- Access and use eight parameters describing interaction properties

To add a button to the Interaction Manager

1. Click **Company Profile** > **Add** button. The Add Company screen appears.

2. Click **CRM Integration**. The CRM tab (Figure B-1) appears.

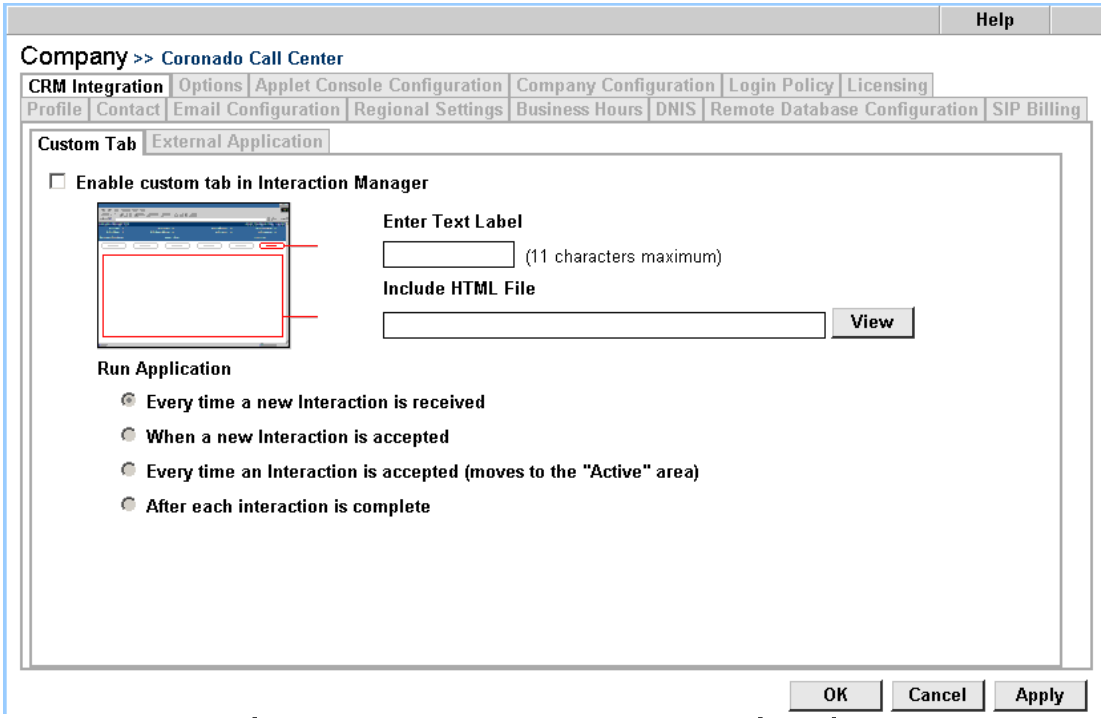


Figure B-1. Company Screen: CRM Integration Tab

3. Check **Enable custom tab in Interaction Manager**.

4. In the Enter Text Label text box, type the text for the button.

5. In the Include HTML File text box, type the name of the HTML or JSP file to display when the agent clicks the custom button.

6. Click **OK**.

When the agent clicks the custom button, IM displays the HTML or JSP file specified. When IM receives a new interaction, Interaction Manager passes parameters describing the interaction to your custom code.

For information about the parameters code can access and use, see “Interaction Parameters” on page B-3.

Interaction Parameters

Each time CCA receives a new interaction, IM passes seven parameters (Table B-1) containing information about the incoming interaction to the HTML or JSP file.

- If you use Java Server Pages for script content, access the values for these parameters using standard methods.
- If you use HTML for script content, you must create your own methods to access the values for the parameters.

Table B-1 Interaction Parameters

Parameter	Description
intid	Interaction ID
projectId	Project ID
From	Interaction ANI information
To	Interaction DNIS information
urlscriptId	Script ID
urlfaqId	FAQ ID
type	Interaction Type. Can be the following: 2001 = New inbound call 2002 = New outbound call 2003 = New predictive call 2004 = End call 2005 = New inbound extension 2006 = New outbound extension 2007 = New ACD call 2008 = New ACD web callback 2009 = New ACD callback 2010 = New ACD web phone 2011 = New ACD chat 2012 = New ACD email 2013 = New ACD voicemail 2014 = New ACD fax

Launching an External Application

Configure IM workstations so that they launch an external application when the following actions occur:

- IM receives a new interaction
- IM accepts an interaction
- An interaction in IM becomes the *active* interaction

To run an executable from the Interaction Manager

1. Click **Company** > **Add** button. The Add Company screen appears.

2. Click **CRM Integration**. The CRM Integration tab (Figure B-2) appears.

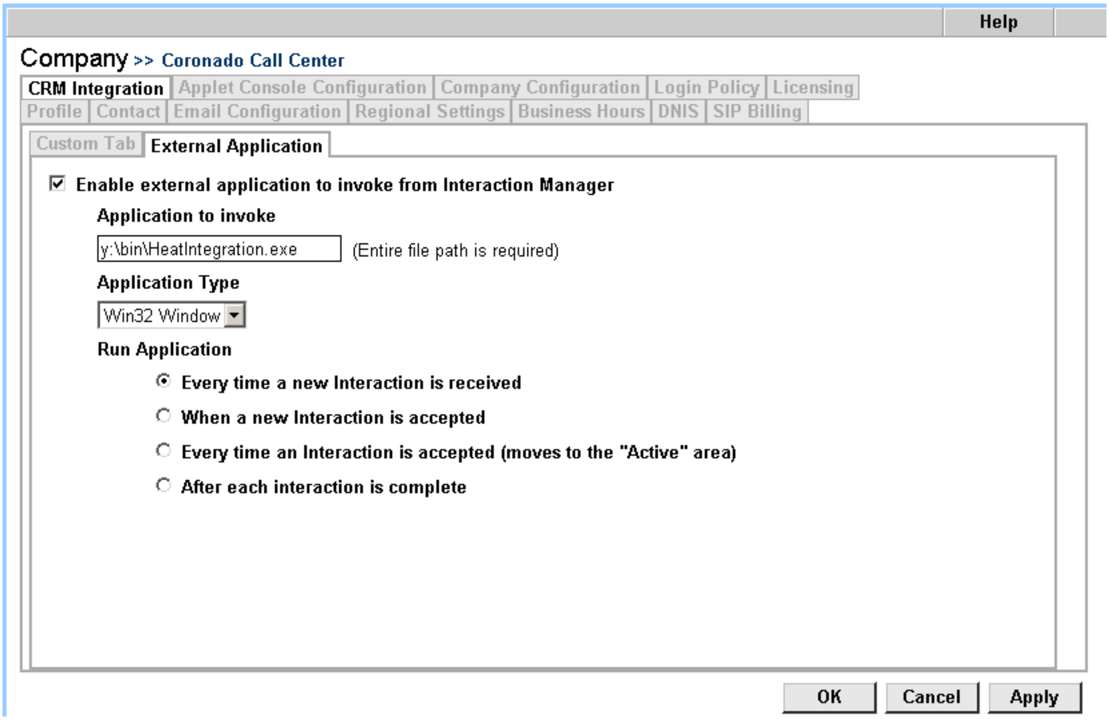


Figure B-2. Company Screen: CRM Integration Tab

3. To invoke an application within the custom tab inside IM:

a. Check **Enable custom tab in Interaction Manager**

b. In the Enter Text Label text box, type a name for the application.

c. In the Include HTML File text box, type the URL to the file to load in the custom tab.

d. Indicate when IM is to launch the application by choosing:

i. **Every time a new Interaction is received**: Launches the application every time IM receives a new interaction.

ii. **When a new Interaction is accepted**: Launches the application the first time the agent accepts the new interaction.

iii. **Each time Interaction is accepted**: Launches the application every time the agent makes the interaction the “Active” interaction.

iv. **After each Interaction is complete**: Launches the application ever time the agent completes an interaction

4. To invoke an external application without using the custom tab inside IM:

a. Click the **External Application** tab

b. Check **Enable external application to invoke from Interaction Manager**.

c. In the Application to invoke text box, type the full path to the location of the executable.

d. From the Application Type drop-down menu, select the window behavior:

i. **HTML Modal**: Opens a new Web browser window with the URL from the “Application to Invoke” text box. (Use this option when you do not want the user return to another application until this window is closed.)

ii. **HTML Window**: Opens a new Web browser window with the URL from the “Application to Invoke” text box. (Use this option when you want the user to minimize or close the window without selecting an option in the new window. The behavior is similar to standard Windows behavior.)

iii. **Win32 Window**: Launches a Windows32 executable.

iv. Check **Enable external application to invoke from Interaction Manager**.

You must install the application to launch on all Interaction Manager workstations.

---

5. Identify when IM is to launch the application by choosing:

   - **Every time a new Interaction is received**: Launches the application every time IM receives a new interaction.
   - **When a new Interaction is accepted**: Launches the application the first time the agent accepts the new interaction.
   - **Every time Interaction is accepted**: Launches the application every time the agent makes the interaction the “Active” interaction.
   - **After each Interaction is complete**: Launches the application every time the agent completes an interaction

6. When IM launches your application, CCA passes an array containing the following strings (Table B-2) to the application:

Table B-2 Array Elements

String
Interaction ANI information
Interaction DNIS information
Project ID
Script ID
QA ID
Interaction ID
Interaction Type

Enabling Predictive Call Handling

For agents to log in to predictive projects and to handle predictive interactions, you must enable Predictive Call Handling to display the necessary IM screen controls.

CCA does not begin placing predictive calls until you start a Predictive Project (see “Starting and Stopping a Predictive Project” on page 10-25).

Enabling Predictive Call Handling simply adds the **Predictive** button and login screen to the agent’s IM console so agent’s can handle predictive interactions.

To enable predictive call handling

1. Click **Company** > **Add** button. The Add Company screen appears.
2. Click the **Company Configuration** tab.

   The Company Configuration tab (Figure B-3) appears.

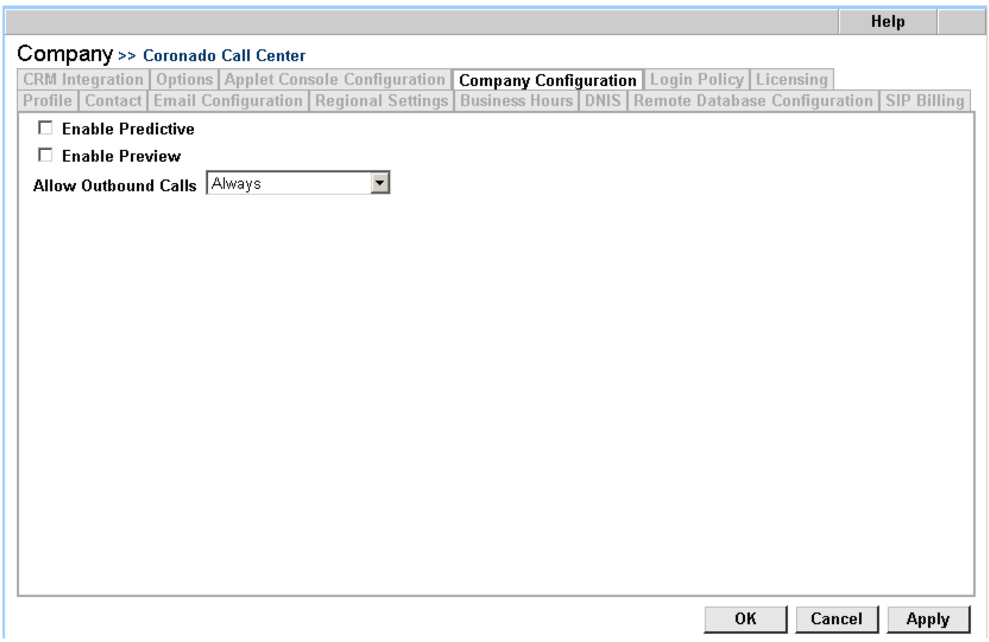


Figure B-3. Company Screen: Company Configuration Tab

3. Check **Enable Predictive.**

4. Click **OK**.

CCA dynamically updates IM so that it displays the predictive button. Agents do not need to log out and log back into IM to see the button.

Capturing Contact Information from Predictive and Preview Interactions

IM Predictive and Preview screens contain a script frame to display HTML or JSP content for the agent to use when handling a contact. You specify the URL containing the script content in the Predictive and Preview tabs of the projects screen (see “Adding Predictive Calling to a Project” on page 10-15 and “Adding Chat Interactions to a Project” on page 10-56).

When the agent is handling a predictive or preview interaction, IM passes the following parameters (Table B-3) describing the contact to the code you supply to populate the script frame:

Table B-3 Predictive and Preview Contact Parameters

Parameter	Contains
title	The contact’s title.
firstname	The contact’s first name
lastname	The contact’s last name
companyname	The contact’s company name
contactid	The contact’s CCA identifier
dnis	The contact’s telephone number
countrycode	The contact’s telephone country code

- If you use Java Server Pages for script content, access the values for these parameters using standard methods.
- If you use HTML for script content, you must create your own methods to access the values for the parameters.

Integrating HEAT Call Logging

CCA has built-in support for the HEAT Call Logging program. You can configure Administration Manager so that Supervision Manager or Interaction Manager automatically passes the customer ANI to the HEAT Call Logging application.

- A simple configuration process exists for both AM and the HEAT Administrator program.
- Decide when to pass the customer ANI to the Call Logging program:
    - Every time a new interaction is received.
    - When a new interaction is accepted.
    - When an interaction is made active.
    - When an interaction is completed.

Configuring Administration Manager

Follow these steps to enable AM support for the HEAT Call Logging program:

1. Start AM.

If you have the S***ervice Provider Edition*** of AM, select the company that will be using HEAT Call Logging.

2. Select **Options** > **Company** > **CRM Integration** tab.

3. Click the **External Application** subtab. The External Application tab (Figure C-1) appears.

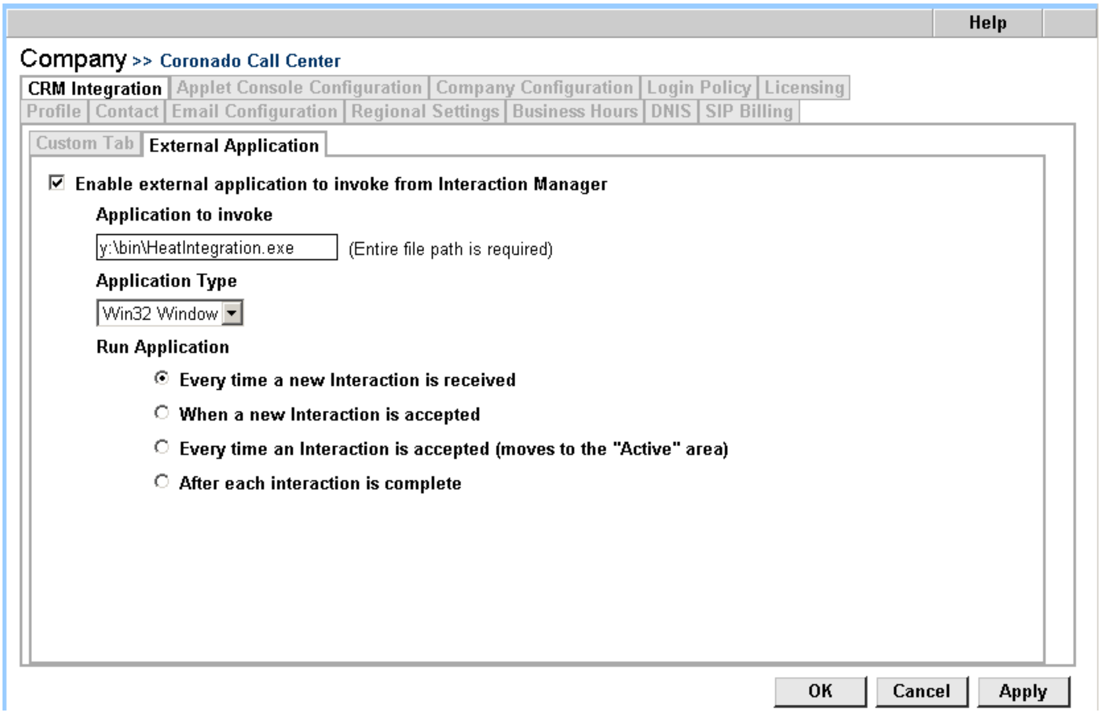


Figure C-1. Internal Application Tab

4. Click the **Enable external application to invoke from Interaction Manager** check box.

5. Using the information in Table C-1, complete the rest of the fields.

Table C-1 External Application Tab Fields and Descriptions

Field	Description
Application to Invoke	If you are using the HEAT Call Logging program, your CCA installation includes a special executable called **HeatIntegration.exe**.

Table C-1 External Application Tab Fields and Descriptions

Field	Description
	CCA uses this executable to pass customer ANI information to the Call Logging program. Every user (agent and supervisor) must have access to this program. Although you could install HeatIntegration.exe on every user's machine, it is usually more efficient to install the program on a network server, and then map a network drive to that server on each user's machine. In the **Application to Invoke** text box, type the full path to the HeatIntegration.exe file (for example: y:\HeatIntegration.exe)
Application Type	You must select **Win32 Window**.
Run Application	Select when to pass the customer ANI to the Call Logging program. For example, choose "After Each Interaction is Complete" so that the customer ANI will not be passed to the Call Logging program until the current interaction ends.

6. Click **OK** (or **Apply**) to save the changes.

Configuring HEAT Administrator

Follow these steps to enable support for CCA in the HEAT Administrator program:

1. Start the HEAT Administrator program.
2. In the HEAT Service and Support Data Source dialog box:
   a. Select a data source
   b. Click **OK**.
3. In the HEAT Administrator login page:

a. Type your User ID and Password.

b. Click **OK**.

4. When the HEAT Administrator module opens, select:

   Defaults menu > **DDE/Telephony** > **Telephony Setup**

5. In the Telephony Settings dialog box, select the **Enable Telephony** tab (Figure C-2).

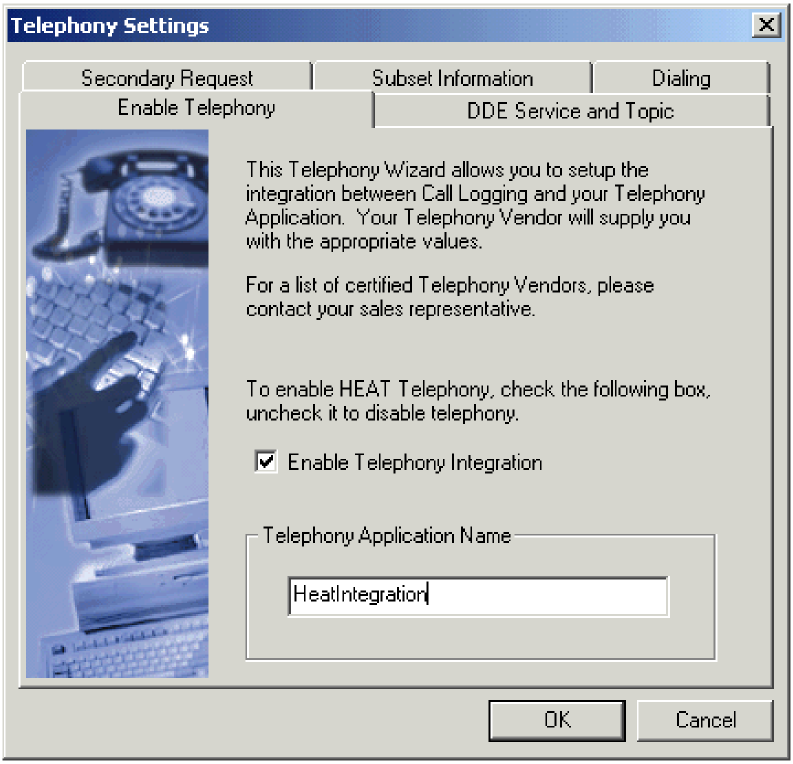


Figure C-2. Enable Telephony Tab

a. Click the **Enable Telephony Integration** check box.

b. In the Telephony Application Name text box, type **HeatIntegration**.

c. Click **OK**.

6. Select the **DDE Service and Topic** tab (Figure C-3).

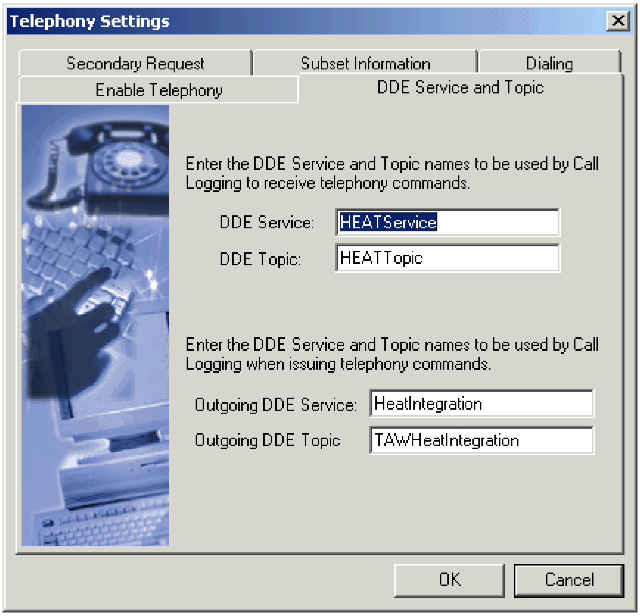


Figure C-3. DDE Service and Topic Tab

7. Using the information in Table C-2, complete the screen.

Table C-2 DDE Service and Topic Tab Fields and Descriptions

In this field . . .	Enter this value . . .
DDE Service	HEATService
DDETopic	HEATTopic
Outgoing DDE Service	HeatIntegration
Outgoing DDE Topic	TAWHEATIntegration

8. Click **OK** to save the changes.

9. In the HEAT Administrator module, select:

   Defaults menu > **DDE/Telephony** > **Customer Search**

10. In the **DDE/Telephony Customer Search Defaults** dialog box (Figure C-4):

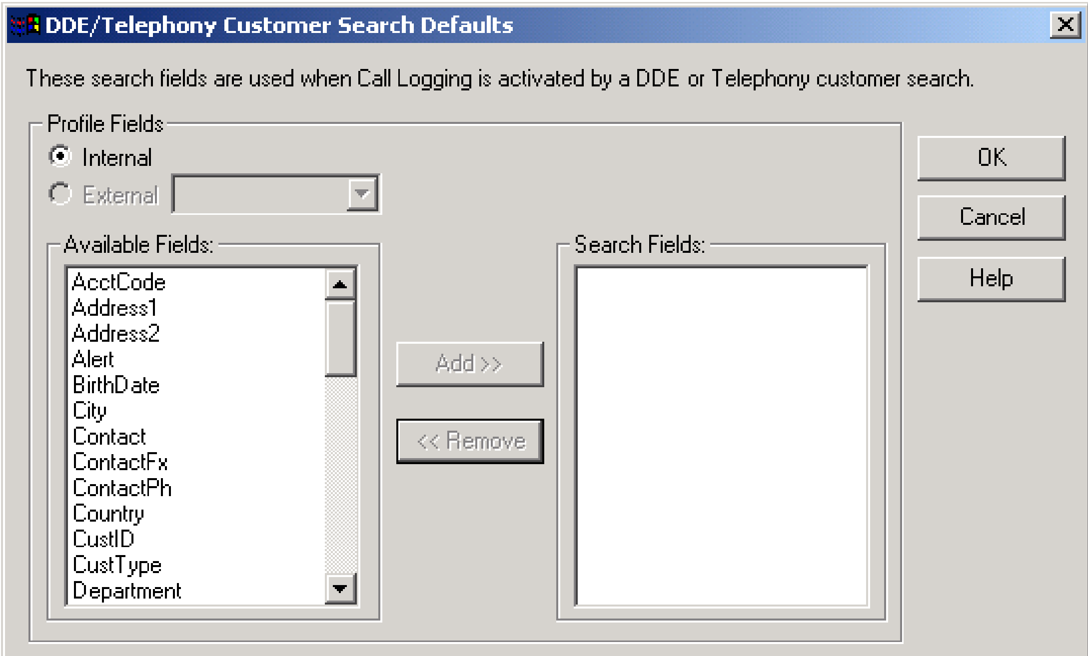


Figure C-4. Search Defaults

a. Select the field(s) to use when searching for the customer's ANI.

b. Then, click the **Add** button.

11. Click **OK** to save the changes.

The configuration for CCA Call Logging support is now complete.

For CCA to Pass the Customer ANI to the Call Logging Program:

- The user (agent or supervisor) must have the CCA application (SM or IM) and the Call Logging program running on their machine.
- If any user was running the Call Logging program while you were performing this configuration, ask the user to close the Call Logging program and re-start it.

Technical Notes

Parameters Passed to External Applications

You can configure AM so that an existing Web page (or Win32 application) launches from IM. For how to do this, see “CRM Integration” on page 3-27.

When the Web page (or Win32 application) launches on the agent’s machine, CCA passes it a set of parameters containing information about the current interaction.

- For a Web page, CCA passes the parameters in the URL string.
- For a Win32 application, CCA passes the parameters as command line arguments.

  The Web page (or Win32 application) can contain code to parse the parameters and make some use of the information.

Parameters Passed to Win32 Applications

Table 4-1 provides a list of parameters that CCA passes to Win32 applications.

Table 4-2 shows interaction states.

Table 4-3 shows interaction types.

Table 4-1. Parameters Passed to Win32 Applications

Parameter	Description
-a	This parameter contains the ID of the agent making the call (for these calls only): • Inbound calls • Outbound calls to company extensions. • Direct outbound calls to external numbers. • Predictive and Preview calls This parameter contains the customer's phone number (for these calls only): • ACD • Direct Inbound
-d	This parameter contains the ID of the agent making the call (for these calls only): • Inbound calls • Outbound calls to company extensions. This parameter contains the number that the agent called (for these calls only): • Direct outbound calls to external numbers. • Predictive and Preview calls This parameter contains the project phone number (for these calls only): • ACD calls This parameter contains the number that the customer called (for these calls only): • Direct Inbound
-p	The ProjectId. The application finds the project name from the Projects Table.
-s	The ScriptId. The application finds the script name from the LibraryURL Table.
-q	The FAQId. The application finds the FAQ name from the LibraryURL Table.
-i	The interaction ID.
-t	An integer representing the interaction type ID. See Table 4-3.
-b	The session ID on the Web server.

Table 4-1. Parameters Passed to Win32 Applications

Parameter	Description
-u	The agent’s user ID. The application finds the script name in the Users Table.

Interaction States

Table 4-2. Interaction States

Interaction State ID	Description
2209	INTERACTION_INCOMING
2210	INTERACTION_HOLD
2211	INTERACTION_VOICEMAIL
2212	INTERACTION_ACTIVE
2213	INTERACTION_CREATE_CONFERENCE
2214	INTERACTION_CHAT

Interaction Types

Table 4-3. Interaction Types

Interaction Type ID	Description
2001	NEW_INBOUND_CALL
2002	NEW_OUTBOUND_CALL
2003	NEW_PREDICTIVE_CALL
2005	NEW_INBOUND_EXTENSION
2006	NEW_OUTBOUND_EXTENSION
2007	NEW_ACD_CALL
2008	NEW_ACD_WEB_CALLBACK
2009	NEW_ACD_CALLBACK
2011	NEW_ACD_CHAT
2012	NEW_ACD_EMAIL
2013	NEW_ACD_VOICEMAIL
2014	NEW_ACD_FAX

Table 4-3. Interaction Types

Interaction Type ID	Description
2024	NEW_OUTBOUND_EMAIL
2033	NOTE
3007	NEW_PREVIEW_CALL
3340	NEW_DIRECT_CHAT
3341	DIRECT_CHAT_SEND_MESSAGE

Parameters Passed to Web Pages

Table 4-4 provides a list of parameters CCA passes to Web pages.

Table 4-5 provides a list of parameters CCA passes for chat and Web callback.

Table 4-4. Parameters Passed to Web Pages

Parameter	Description
interactionId	A unique ID for each installation. (Even for Service Provider customers, we never repeat this number, no matter how many companies they provide service to.) The number could, however, be repeated at a separate CCA installation.
projectId	A unique ID for each project.
to	The number the customer dialed.
from	The customer's ANI.
scriptId	The ID of the script the project uses.
faqId	The ID of the FAQ the project uses.
interactionType	The interaction type ID. See Table 4-3 for a list of interaction types.
state	The State ID of the interaction. See Table 4-2 for a list of states.
display	A string describing the interaction. The description appears in active interaction area.
agentFirstName	The agent's first name.

Table 4-4. Parameters Passed to Web Pages

Parameter	Description
agentLastName	The agent's last name.
agentCompanyName	The company to which the agent is associated.
companyId	The customer's company.
agentId	A unique agent ID number.
imFirstName	The contact's first name. CCA always passes, but doesn't populate unless a contact is assigned.
imLastName	The contact's last name. CCA always passes, but doesn't populate unless a contact is assigned.
imCompanyName	The contact's company name. CCA always passes, but doesn't populate unless a contact is assigned.
imContactId	The contact's ID. CCA always passes, but doesn't populate unless a contact is assigned.

Web Parameters Passed for Chat and Web Callback

These parameters are passed to all Web pages, but they may be empty unless the interaction is a chat callback or a Web callback.

Table 4-5. Parameters Passed for Chat and Web Callbacks

Parameter	Description
requestTime	Time when the customer wants a call back. (Integer in number of seconds GMT since 1970.)
contactId	preview/predictive id.
offset	The time zone. Sent as an offset from GMT in seconds.
queueTime	Time the customer has been in the queue.
countryCode	The country code the customer selected in the Web Callback screen.
timezone	The timezone of the person who requested the Web callback.
rescheduleTime	A callback has been rescheduled at this time.

Table 4-5. Parameters Passed for Chat and Web Callbacks

Parameter	Description
email	The email address the customer entered in the Request a Chat page.
priority	The priority of the current interaction, taken from the project.
title	No longer used.
extension	The extension the customer entered in the Web Callback page or Chat Request page.
firstName	The first name the customer entered in the Web Callback page or the Chat Request page.
lastName	The last name the customer entered in the Web Callback page or the Chat Request page.
companyName	The company name the customer entered in the Web Callback page or the Chat Request page.
phoneNumber	Phone number the customer entered in the Web Callback page or Chat Request page.
countryCode	If the current interaction is predictive or preview, this parameter has the value from the country code column in the dialer list.

Wallboard

A standalone product (***WallboardServer*** or ***WallboardServerW.exe***) streams CCA data to the customer's wallboard. The difference is the first one will run in a command prompt and the other will not.

To start the application you must pass the parameter of the property file. (This file contains the setting allowing the application to connect to the Web server through the Web Service and to determine the port on which the server will listen.)

1. File

    a. WallboardServerW.exe - Application not running in a console.

    b. WallboardServer.exe - Application running in a console.

c. statistic.properties - Configuration file.

d. StatClient.exe - Application client for test purpose. Need to pass the following parameters:

   i. StatClient.exe -h<Wallboard Server hostname> -p<Wallboard Server port>

For example:

```
StatClient.exe -hpierre -p8001
```

2. Configuration file

   a. statistic.properties

   b. debugTracelevel=<Level of log file> DEBUG, ERROR, WARNING or INFO

   c. debugLogFile=<Full file name>

   d. debugMaxLogFileSize=<Size of the log file>

   e. debugMaxNumberLogFiles=<Number of log file>

   f. debugLogPattern=<Pattern of the logging information>

   g. port=<Port on which the server will listening to accept connection>

   h. pingDelay=<Delay to get the information from the Web Server>

   i. url=<UR of the Web Server>

   j. alias=<Alias of the company>

   k. username=<Username - Must be a supervisor>

   l. password=<Password of the user>

For Example:

```
debugTracelevel=DEBUG
debugLogFile=./Statistics.log
debugMaxLogFileSize=1024000000
debugMaxNumberLogFiles=5
debugLogPattern=%d{DATE} [%t] %-5p %c.%M(%F:%L) %x
- %m
```

```
port=8001
pingDelay=1000
url=http://pierre/
alias=Pete
username=super1
password=1234
```

Index

Symbols

A

B

C

D

E

F

G

H

I

L

M

N

O

P

Q

R

S

T

U

V

W