Powering connections

MiVoice Connect Contact Center Supervisor Guide

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Trademarks

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Before You Start

About This Book

ShoreTel is now part of Mitel. Together, we look forward to helping you power connections that are brilliantly simple.

This guide describes how to use the following Connect Contact Center supervisor applications:

- Agent Manager
- Contact Center Reports
- Interaction Center

This guide is intended for call center supervisors.

Organization

The document is divided into the following chapters:

- Chapter 1, Overview
- Chapter 2, Monitoring Activity
- Chapter 3, Analyzing Trends

Conventions

The following typographical marking conventions are used in this document.

Marking	Meaning
Bold	Names of interface objects, such as buttons and menus.
`Courier`	Code examples.

Marking	Meaning
Courier Italic	Variables in code examples.
Blue	Cross references with hyperlinks. Click the blue text to go to the indicated section. All chapters have a list of section links on the first page. **Note:** Table of Contents entries are also links, but they are not shown in blue.

CHAPTER 1

Overview

Connect Contact Center includes three applications: Agent Manager, Connect Contact Center Reports, and Interaction Center. Using these applications, you can monitor Automatic Call Distribution (ACD) activities, generate reports on call center performance, and monitor agents logged in to the Interaction Center. Multiple supervisor workstations can be activated simultaneously, allowing a number of supervisors and managers to work on various tasks at the same time.

Refer to the following sections for more information about Connect Contact Center supervisor applications:

Agent Manager

Agent Manager is used by managers and supervisors to obtain real-time statistical information concerning call center activities. The information can be displayed in tables, forms, and graphic formats, providing a clear picture of what is going on in your call center.

Agent Manager also enables supervisors to adjust their resources by adding and removing agents from groups.

Interaction Center

Interaction Center is a web client for all agent functions and supervisor coaching functions. Supervisors can easily monitor agent activity and queue/group activity, and when necessary, supervisors can interact with agents using monitor, whisper coaching, and barge-in. Supervisors also can review key performance indicators to assess contact center performance.

Connect Contact Center Reports

Connect Contact Center Reports generates historical statistical reports that you can use in evaluating past activities and planning future actions. The application contains a variety of predefined reports that can be quickly generated. In addition, you can create reports based on an extensive set of easily customizable templates.

Terminology

The following list includes basic terminology you must understand to successfully create Connect Contact Center reports:

- ACD — Automatic Call Distribution. The method used to distribute interactions - voice, email, and chat - in Connect Contact Center. ACD calls are routed and monitored by the Mitel Connect system.
- Agent — An operator who handles interactions in a call center.
- Agent Group — Agent groups form specialized units that receive and place interactions. A group is a destination of the service entity in Connect Contact Center. Interactions delivered to the group are presented to the most appropriate agent according to the specified routing policy.
- Agent Queue — Connect Contact Center provides each agent with a personal queue, allowing voice calls and email calls to be queued for that specific agent. This powerful and useful feature is very relevant for sales-oriented and direct-marketing organizations where individual agents are responsible for accounts. This functionality can also improve customer service in call centers with a small number of agents and fluctuating amounts of traffic, since agents can address higher priority voice calls and email calls while transferring their current interaction into their personal queue. Interactions can also be routed to an individual agent first, and then expanded to a larger set of agents if the primary agent is not available. In addition, agent queues can be used as a routing destination by a service, IRN, or call control script.
- ANI — Automatic Number Identification. The series of digits that is sent by the PSTN to the PBX containing the Dial Number of the caller.
- ANI Domain — A set of 1 or more Telephone number prefixes (part of which may be whole telephone numbers) grouped under a domain name for statistical purposes.

- ASA — Average Speed of Answer. The average time it takes for an interaction to be answered, from the time it is received.
- DNIS — Dialed Number Identification Service. A series of digits that precede a phone call with the number the caller dialed.
- Entity — Administrative objects in the Mitel Connect system, upon which system operations are based. These are agents, groups, trunks, supervisors, services, IRN, domains, customers, DNIS, dial lists, IVR groups, IVR applications, email accounts, and system.
- Group — Several agents or trunks that function as one unit for call handling purposes.
- Interval, Historical Reports — Also known as an off-line interval. A system-wide parameter that defines the resolution for saving statistical data into the database. For historical reports, the interval may be 15, 30, or 60 minutes.
- Overflow — Overflow is a routing technique that can improve customer service and optimize valuable resources. Highly trained or cross-trained agents are reserved as backups for groups experiencing unusually heavy traffic. When the wait time exceeds the specified timeout, backup resources are automatically added to the pool and made available to handle customer interactions.

  The overflow timeout is the number of seconds a call is in queue, after the mandatory announcement. This value is specified in the **Services** > **Overflow** > **Overflow Timeout** option in Connect Contact Center Director.
- Parameter — Defines the reporting criteria, specifically a report's entities, date range, time range, and interval, where applicable.
- STI — Service Time Interval. The time period that serves as a starting point for Connect Contact Center statistical information. This parameter determines the time period within which interactions waiting in the queue are measured in historical reports. The STI is defined for each group in the system using Connect Contact Center Director.
- TSF — A measurement that indicates how well the entity, such as a group or DNIS number, is providing the Target ASA (Average Speed of Answer). The TSF may be calculated in one of the following three ways:
  - The percentage of interactions answered within the Target ASA, out of all the measured entity's interactions. Abandoned and overflowed calls are considered answered after the Target ASA;
  - The percentage of interactions answered within the Target ASA, out of interactions answered by the measured entity; and
  - The percentage of interactions answered within the Target ASA, out of interactions answered by the measured entity and interactions abandoned after the Target ASA.
- Wrap-Up Code — A code entered by an agent during the wrap-up time in order to provide additional information for evaluating the actions of the call center. In most cases, wrap-up codes provide information for evaluating interactions for reporting purposes, including the type of interaction — request or complaint; level of required action — urgent, regular, or low; status of the deal — closed, needs recall; and so on.

Starting the Supervisor Applications

Each Contact Center supervisor application is started separately. Use the credentials provided by your administrator to log in to Contact Center applications. When you access the Application Programming Interface (API), you must not be logged in as a web agent with the same credentials.

Supervisors can log in using their supervisor ID or the agent name associated with their Supervisor account in **Supervisors** > **Accounts** > **General** > **Agent Name**.

Supervisors also can start applications by right-clicking the login console icon that appears in the Windows task bar.

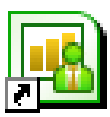
Note

Connect Contact Center supervisor applications should not be used with the following Windows Power Schemes: Turn off hard disks, System standby, and System hibernates. These options should be set to Never because the Connect Contact Center Server and the supervisor applications are synchronized every night at midnight. If your computer is set to one of these options, the synchronization fails.

Starting Agent Manager

1. From the Windows desktop, click **Start** > **All Programs** > **ShoreTel** > **ShoreWare Contact Center Supervisor** > **ShoreTel Connect Agent Manager**.

   If the Agent Manager icon is on your desktop, or in the Windows Start menu, you can click this icon to start Agent Manager.

2. In the Connect Contact Center Login Console window, specify **User** and **Password**, and then click **Login**.

Starting Contact Center Reports

1. From the Windows desktop, click **Start** > **All Programs** > **ShoreTel** > **ShoreWare Contact Center Supervisor** > **ShoreWare Contact Center Reports**.

   If the Connect Contact Center Reports icon is on your desktop or in the Windows Start menu, you can click this icon to start Connect Contact Center Reports.

2. In the Connect Contact Center Login Console window, specify **User** and **Password**, and then click **Login**.

CHAPTER

2

Monitoring Activity

Connect Contact Center Agent Manager provides tools and real-time statistical information to manage your agents and inform you about the current situation in your call center.

This chapter explains how to change agent group assignments, monitor agent interaction with customers, and work with real-time reports. Refer to the Agent Manager online help for details for specific real-time reports.

Refer to the following sections for more information about monitoring Connect Contact Center activity:

Changing Agent Group Assignments

Agent Manager’s Login Manager enables you to temporarily change the group and agent queue assignment of agents currently working in the call center. These changes are in effect until the agent logs in to or out of his/her groups or queues.

The Login Manager has two optional views: Agents Login Status and Groups Login Status. In the Agents Login Status view, you can see an agent's current group and agent queue assignments. You can then add or remove groups to and from the agent. The Groups Login Status view allows you to see the agents currently logged into a specific group and agent queue. You can then add or remove agents to and from the group.

Note that agents can enter a wrap-up code for an ACD interaction even if they are logged out of a group.

Complete one of the following steps to open the Login Manager:

1. Click the Login Manager icon on the Toolbar.
2. Right-click a report based on the Group Agents Report or Brief Agent Report templates, and then select **Login Manager** from the popup menu.

   The **Agents Login Status** tab includes the following items:

   - **Agents** — Lists all agents currently logged into the system.
     - **Name** — The name of the agent
     - **Number** — The ID number of the agent
   - **Logged-in Groups** — Lists the groups and agent queues that the selected agent is currently logged into.
   - **Available Groups** — Lists the groups and agent queues that the agent is currently not logged into.

   The **Groups Login Status** tab includes the following items:

   - **Groups** — Lists all groups and agent queues defined in the system.
   - **Logged-in Agents** — Lists the agents currently logged into the selected group or agent queue.
   - **Available Agents** — Lists the agents currently not logged into the selected group or agent queue, but logged into at least one other group or agent queue.

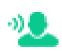
Monitoring Agent Interaction with Customers

Connect Contact Center provides various ways to monitor agent interaction on customer calls and chat sessions.

Viewing Agent Activity and Monitoring Interactions

Supervisors can monitor and join agent's interactions in the following three ways:

Table 1: Monitoring Interactions

Icon	Feature	Description
	**Barge**	Use this feature to actively participate in the interaction. The agent and the other participant will both be able to see or hear your participation in the interaction.
	**Whisper**	Use this feature to silently coach the agent. The other interaction participant will not hear or see your interaction with the agent.
	**Silent Monitor**	Use this feature to silently monitor the agent's interaction. The agent will know that you are observing the interaction, but you will not be able to interact with the agent or the other participant in the interaction.

Tip

When you click **Silent Monitor**, the **Barge** and **Whisper** options are unavailable.

Note

While monitoring agent chat interactions, a supervisor's status is idle, and s/he can continue to receive interactions.

Complete the following steps to view activity by agent:

1. Log in to Interaction Center.
2. Search for specific agents by typing all or part of the agent name, agent number, or queue name in the search dialog at the top of the page.
3. You can sort the agent information alphabetically by clicking the **All** column, or you can sort it by the most recent help request by clicking the **Help Request** column.

The **Help Request** column shows which agents have contacted a supervisor for help with an interaction.

4. Use the **Barge In**, **Silent Monitor**, or **Whisper** features to participate in the agent's interactions.

About Real-Time Reports

The reports generated through Agent Manager provide data on call center activity in real time. These reports can be used in the management of agents and to watch the changing conditions in the call center. Alerts indicate when a specific threshold is reached or exceeded.

Real-time reports have a template that you use to specify the criteria for the data in the report. Three types of real-time report templates exist: real-time, hourly summary, and daily summary.

Information in real-time reports is displayed in tabular or graphical formats, or as a form. You can save an arrangement of reports on your workspace (desktop); the display remains consistent each time you start Agent Manager.

Using Thresholds

By default, Agent Manager specifies thresholds for real-time group activity. Information on this activity is displayed by running specific reports. When the activity, such as number of calls in queue, reaches or exceeds a threshold, you receive an alert. The data in the report is usually highlighted in yellow when the threshold is reached, and in red when the threshold is exceeded.

Thresholds are defined in the following places:

- Group Thresholds — Defined in Connect Contact Center Director on the **Groupings** > **Groups** > **Thresholds** page.
- Agent Queue Thresholds — Defined in Connect Contact Center Director on the **Routing** > **Agent Queue Profiles** > **Thresholds** page.
- Email Agent Queue Thresholds — Defined in Connect Contact Center Director on the **Email** > **Email Agent Queue Profiles** > **Thresholds** page.

In addition to a color indicator, an audible alert is available. This alert can either be a system beep or a sound from a WAV file, and the alert can play once or continuously for a specified period of time. Alerts are configured using **Supervisors** > **Alerts** in Connect Contact Center Director.

Agent Manager provides two default files used as the audible alerts, `warning.wav` and `alarm.wav`. When data meets or exceeds the yellow threshold level, the sound in the `warning.wav` file is used. The `alarm.wav` file sounds when the data meets or exceeds the red threshold level. You can use custom alerts by recording or using an existing WAV file. Save your custom sounds in the `Supervisor\Bin` folder of your Connect Contact Center directory with the filename `custom_warning.wav` and `custom_alarm.wav`.

Contact your system administrator to implement or change threshold levels for specific group activities. In order to use audible alerts, your system must be configured for this feature. Check with your system administrator if you have questions about using or implementing audible alerts.

- White — Value is in the normal zone.
- Yellow — Value is in the warning zone.
- Red — Value is unacceptably high or low.

The Threshold tab contains the following information:

- Name of the event that the threshold is specified for.
- Yellow — Threshold has been exceeded.
- Red — Threshold has been exceeded to an unacceptable level.

Real-Time Report Templates

Real-time reports are based on three types of templates: real-time, hourly summary, and daily summary.

Real-time templates show statistical and summary data on agents for the recent time interval. The real-time interval is specified using **Groupings** > **Groups** > **General** in Connect Contact Center Director. Using reports generated from a real-time template, you can watch the data change as events occur in your call center.

Hourly summary templates are used to generate reports that display hourly statistics and summary data for selected groups. Each row in the report shows data for the interval starting from the time shown until the start time of the next interval. Data is not displayed until the time interval has completed. For example, data on the 16:15 interval would not be displayed until the time was 16:30.

Daily summary templates shows statistical and summary data for a group of agents. Data is calculated over the entire day starting at midnight and ending at the following midnight.

Template Subjects

The subject of a template can be one of the following entities:

- **Agents** — An operator who handles calls in a call center.
- **Groups** — A group of agents. There are different group templates for voice call flows and email flows.

Tip

Connect Contact Center puts calls into queue(s) associated with a group of agents. To view queue statistics, use a group template.

- **Agent Queues** — Allow voice and email calls to be queued for a specific agent.
- **IVR Applications** — Sections of logic defined in call control scripts.
- **IVR Ports** — A grouping of IVR applications.

- **Dial Lists** — Used for outbound calling campaigns and are sets of telephone numbers that are automatically dialed and routed to agents. From this report, you can end the activity of a currently running dial list by clicking Terminate.
- **DNIS** — Associated with a specific IRN, which is the first point of entry into Connect Contact Center. There are different DNIS reports for voice call flows and email flows.

Daily Summary Templates

The following daily summary templates are available for generating real-time reports:

- Daily Brief Agent Queue Report
- Daily Brief Email Agent Queue Report
- Daily Brief Email Group Report
- Daily Brief Group Report
- Daily Detailed Email Group Report
- Daily Detailed Group Report

Hourly Summary Template

Connect Contact Center provides the following hourly summary template for generating real-time reports:

- Group Hourly Report

Real-Time Templates

Use one of the following real-time templates to generate a report on the recent time interval:

- Agents Distribution Graph
- Agents Needing Help
- Brief Agents Report
- Brief Agent Queue Report
- Brief Dial List Report
- Brief DNIS Report
- Brief Email Agent Queue Report
- Brief Email DNIS Report
- Brief Email Group Report
- Brief Group Report

- Brief IVR Applications Report
- Calls Distribution Graph
- Detailed Email Group Report
- Detailed Group Report
- Detailed IVR Applications Report
- Email Contacts Distribution Graph
- Email Group Overflow\Interflow Report
- Email Group Queue Contacts Graph
- Email Group STI Graph
- Graphical Agents Report
- Group Agents Report (1)
- Group Agents Report (2)
- Group OACD STI Graph
- Group Overflow\Interflow Report
- Group Queued Calls Graph
- Group Queued OACD Calls Graph
- Group STI Graph
- IVR Applications ACD Distribution Graph
- IVR Applications Active ACD Graph
- IVR Applications Active OACD Graph
- IVR Applications OACD Distribution Graph
- IVR Group IVR Ports Report
- IVR Ports Distribution Graph
- IVR Ports Report
- Staffing Graph
- Staffing Percent Graph
- Staffing Percent Report
- Staffing Report

Creating Real-Time Reports

You can create a new real-time report for current information on your call center.

If you want to generate reports on call activity in an IVR Application, you first need to specify the associated DNIS.

Complete the following steps to create a real-time report:

1. In Agent Manager, click **File** > **New**, or click the **New** icon on the Toolbar.
2. Select a **Report Type**.
3. Select a **Template Name**, and click **OK**.
4. You can change the sort order of the entities in the list by clicking the entity title.

   Entities listed alphabetically are displayed in reverse alphabetical order; entities listed by number are displayed in reverse numerical order.
5. Select the required entity, and click **OK**.

   The window title bar indicates that the report is untitled, and displays the name of the template on which the report is based.

   Any current activity in the ACD is immediately reflected in the report.

   For information about the data displayed in these reports, refer to the *Report Data Fields Reference Guide*.

Opening Existing Real-Time Reports

Complete the following steps to open an existing real-time report:

1. In Agent Manager, click **File** > **Open** or click the **Open** icon on the Toolbar.
2. To narrow the list of reports displayed, select **Public** and/or **Private**, and select the **Report Type**.
3. Select the report to open, and click **OK**.

Working with Graphical Reports

The Graphic Toolbar is displayed at the top of graphical report windows.

You can use the following Toolbar features to change the way a graphical report is displayed:

- **Palette Selector (1)** — Change the color scheme based on predefined palettes.

- **Points Labels (2)** — Show or hide the labels for the points of the graph.
- **Legend Box (3)** — Show or hide the legend.

Not all the features available from the Toolbar are applicable to all graphical reports. Those not available for a specific report are grayed out.

Saving Real-Time Reports

A report can be saved in both the public and private report lists. All authorized supervisors can view public reports, but only you who created them can view private reports.

Complete the following steps to save a real-time report:

1. Log in to Agent Manager.
2. To save a report with its current properties, click **File** > **Save** or click the **Save** icon on the Toolbar.

   To save a report for the first time, you must click **File** > **Save**; the **Save** icon is disabled.
3. To save a report with a new file name, or to save a private report as public (or the reverse), click **File** > **Save As** or click the **Save As** icon on the Toolbar.
4. Use the Save As dialog box to specify the name and location of the report.

Modifying Real-Time Reports

After you create a real-time report, you can modify the report to reflect the data you want to see:

- Change the entity a report is based on.
- Add entities to a report.
- Remove entities from a report.
- Reorder items in a tabular report.
- Change the order of fields in a tabular report.
- Add and remove fields in a tabular report.

Changing the Report Entity

For reports based on only one entity, you can change the entity without having to create a new report.

Complete the following steps to change the report entity:

1. In an open report, click **Contents** > **Change** or click the **Change** icon on the Toolbar.

2. If you want to change the sort order of the entities, click the entity title.

   Entities listed alphabetically are displayed in reverse alphabetical order; entities listed by number are displayed in reverse numerical order.

3. Select the entity that you want the report to now be based on.

4. Click **OK**.

Adding Entities to Reports

You can add entities to an existing report to change the content and create a different report without having to create a new report.

Complete the following steps to add an entity to a report:

1. In an open report, click **Contents** > **Add** or click the **Add** icon.

2. If you want to change the sort order of the entities, click the entity title.

   Entities listed alphabetically are displayed in reverse alphabetical order; entities listed by number are displayed in reverse numerical order.

3. Select the entity to add to the report, and then click **OK**.

Removing Entities from Reports

You can remove entities from an existing report to change the content and create a different report without having to create a new report.

Complete the following steps to remove an entity from a report:

1. In an open report, click **Contents** > **Remove** or click the **Remove** icon on the Toolbar.

2. If you want to change the sort order of the entities, click the entity title.

   Entities listed alphabetically are displayed in reverse alphabetical order; entities listed by number are displayed in reverse numerical order.

3. Select the entity to remove from the report, and then click **OK**.

Reordering the Items in a Report

For tabular reports, you can change the order of the items in the report to be sorted by name, number, or extension number (if applicable).

Complete the following steps to reorder the items in a report:

1. In an open report, click **Contents** > **Reorder** or click the Reorder icon on the Toolbar.

2. Select the sort criteria, and then click **OK**.

Changing the Order of Fields in a Report

To change the field order, click the header of the field you want move, and then drag the field to its new location in the report.

Adding and Removing Fields in a Report

Complete the following steps to add or remove fields in a report:

1. In an open report, click the **Add/Remove Columns** icon on the Toolbar.
2. To add a field, select the field(s) in the **Available Columns** list, and click **Add**.
3. To remove a field, select the field(s) in the **Visible Columns** list, and click **Remove**.
4. Click **OK**.

Setting the Refresh Rate

The refresh rate defines how often Agent Manager requests an update from the server. By default, the refresh rate is one second. You can instead set a refresh rate that is automatically determined based on the network load, or set a specific rate.

Note

If an activity begins and ends before the next update of information, this activity is not reported in the report. For example, if the refresh rate is 5 seconds and an agent speaks on a call for 3 seconds, this call is counted as a call but there will be no change in the agent state.

Complete the following steps to set the refresh rate:

1. If you want the system to automatically set the refresh rate depending on the load of the network, click **Tools** > **Refresh Rate** > **Automode**.
2. If you want to set a specific refresh rate, click **Tools** > **Refresh Rate** > **Manual Mode**.
3. Select the refresh rate, in seconds, and then click **OK**.

   If the manually set refresh rate is determined by the system to be insufficient for the current network load, the system automatically increases the rate to a more efficient number.

Saving a Workspace

You can save a personal workspace such that, each time you start Agent Manager, the reports you are most interested in are automatically displayed and updated.

Complete the following steps to save a workspace:

1. Open, create, modify, and place the reports you want to automatically see each time you start Agent Manager.

   Use the commands from the **Windows** menu to place and order the reports in a layout you want.

2. Click **File** > **Workspace** > **Save As Default**.

3. You can revert to your default workspace by choosing **File** > **Workspace** > **Restore Default**.

CHAPTER

3

Analyzing Trends

Historical reports are used to obtain information about past call center activity. The powerful, yet easy to use, Connect Contact Center Historical Reports application provides activity summaries and statistical data that can help you analyze system behavior and aid in the assessment of resources required to meet target service levels.

Additional powerful tools (including sorting by fields, filtering of data by user-defined criteria, and defining of noncontinuous periods) are provided to support a comprehensive and flexible environment for generating sophisticated reports without requiring you to know about database tables, SQL queries, or programming languages.

An integrated scheduler enables automated reports to be printed, emailed, or exported to a variety of external format (such as Excel, HTML, and PDF) at required times.

Historical data on your call center can be retained for 12 or 24 months. This allows you to run historical reports on trends for the current year vs. the previous year. The default retention period is 12 months. Refer to the *Connect Contact Center Administrator Guide* for information on changing the length of time to retain historical data to 24 months.

Note

Generating a report may take several minutes. While the report is generating, do not use the Connect Contact Center Reports application. Doing so results in the error message “Error retrieving rows,” and the report generation is halted.

- page 35Enhanced Metafile Format (.EMF)
- SQL Syntax (.SQL)
- Text with HTML Formatting (.HTM)

To view more information about historical reports, refer to the Mitel MiVoice Connect Contact Center Reports Help article on the Mitel support site.