

Contact Center Supervisor Manual

NEC Enterprise Communication Technologies, Inc. reserves the right to change the specifications, functions, or features at any time without notice.

NEC Enterprise Communication Technologies, Inc. has prepared this document for use by its employees and customers. The information contained herein is the property of **NEC Enterprise Communication Technologies, Inc.** and shall not be reproduced without prior written approval of **NEC Enterprise Communication Technologies, Inc.**

UNIVERGE is a registered trademark of NEC Corporation. Windows and Internet Explorer are registered trademarks of Microsoft Corporation. Microsoft Windows 7, Windows 8, Windows 8.1, Windows 10, .NET Framework and the Windows logo are trademarks, or registered trademarks of Microsoft Corporation in the United States and/or other countries.

Copyright 2020

NEC Enterprise Communication Technologies, Inc.
3929 W. John Carpenter Freeway
Irving, TX 75063-9406

Table of Contents

Chapter 1 Introduction to NEC Contact Center

Section 1	Overview	1-1
Section 2	Contact Center Components.....	1-2
2.1	Contact Center Server.....	1-2
2.2	Admin Utility	1-2
2.3	Dashboard.....	1-3
2.4	InControl Contact Center Reports	1-3

Chapter 2 Logging Into Contact Center Server

Section 1	Starting Contact Center Server for the First Time	2-1
1.1	Describing the Contact Center Server Main Screen	2-3

Chapter 3 Configuring Contact Center Server

Section 1	Touring the Main Contact Center Server Window.....	3-1
Section 2	File Menu	3-2
2.1	Exit	3-2
Section 3	Setup Menu.....	3-3
3.1	Serial Port Setup	3-4
3.2	Connectivity Test.....	3-5
3.3	Server Settings.....	3-6
3.4	Contact Center Service	3-7
3.5	Release License	3-7

Section 4 Tools Menu 3-8

Section 5 Help Menu 3-9

Chapter 4 Admin Utility

Section 1 Introduction 4-1

Section 2 Browser Requirements 4-1

Section 3 Application Startup 4-1

Section 4 Admin Structure 4-2

 4.1 Contact Center 4-3

 4.1.1 Agent Configuration Settings 4-4

 4.1.2 Queue Configuration Settings 4-6

 4.2 United Communications 4-7

 4.2.1 UC User Configuration Settings 4-7

 4.2.1.1 Add New User 4-8

 4.2.1.2 Edit Existing User 4-9

 4.2.1.3 Copy Existing User 4-9

 4.2.1.4 Delete Existing User 4-10

 4.2.1.5 Import Users 4-10

 4.3 Miscellaneous 4-10

 4.4 License Level Alert 4-12

 4.5 Additional Features 4-13

Chapter 5 Dashboard

Section 1 Introduction 5-1

Section 2 Browser Requirements 5-1

Section 3 Application Licensing 5-1

Section 4 Application Startup 5-2

Section 5 Dashboard Application Structure 5-3

5.1	Title Bar	5-5
5.2	Tab Control Area	5-5
5.3	Display Area	5-8
Section 6	Display Types.....	5-9
6.1	Agent Display Types	5-9
6.1.1	Agent State Display	5-9
6.1.2	Agent Summary Display	5-10
6.2	Queue Displays	5-11
6.2.1	Queue Monitor Display	5-11
6.2.2	Queue Summary Display	5-13
6.2.3	Queue Performance Display	5-15
6.2.4	Queue Summary by Hour	5-16
6.3	Call Center Displays	5-17
6.3.1	Call Center State Displays	5-18
6.3.2	Call Center Summary Display	5-19
Section 7	Display Definition	5-21
Section 8	Edit Thresholds	5-22

THIS PAGE INTENTIONALLY LEFT BLANK

List of Figures

Figure 2-1	Contact Center Server Main Menu	2-2
Figure 3-1	Contact Center Server File Menu	3-2
Figure 3-2	Contact Center Server Setup with Wallboard	3-3
Figure 3-3	Serial Port Setup	3-4
Figure 3-4	Connectivity Test	3-5
Figure 3-5	Contact Center Server Setup	3-6
Figure 3-6	Contact Center Tools Menu	3-8
Figure 3-7	Contact Center Server Help	3-9
Figure 4-1	Admin Login Screen	4-2
Figure 4-2	Admin Structure	4-3
Figure 4-3	Agent List	4-4
Figure 4-4	Agent Name	4-5
Figure 4-5	List of Queues	4-6
Figure 4-6	List of UC Users	4-7
Figure 4-7	Trunks Configuration Menu	4-11
Figure 4-8	License Level Alert	4-12
Figure 4-9	Alert Popup	4-12

Figure 5-1	Dashboard Login Screen	5-2
Figure 5-2	Dashboard – Screen Layout	5-3
Figure 5-3	Example of Configured Dashboard	5-4
Figure 5-4	Example of Dashboard Title Bar	5-5
Figure 5-5	Example of Dashboard Single Tab	5-5
Figure 5-6	Dashboard Edit Mode	5-6
Figure 5-7	Tab Name in Edit Mode	5-6
Figure 5-8	Display Types	5-7
Figure 5-9	Display Window in Edit Mode	5-8
Figure 5-10	Dashboard Controls	5-8
Figure 5-11	Example of Agent State	5-10
Figure 5-12	Example of Agent Summary	5-11
Figure 5-13	Queue Monitor – Displayed as Table	5-12
Figure 5-14	Queue Monitor – Display Block	5-12
Figure 5-15	Queue Monitor – Displayed as Graph	5-13
Figure 5-16	Queue Summary – Displayed as Table	5-14
Figure 5-17	Queue Summary – Display Block	5-14
Figure 5-18	Queue Summary – Displayed as Graph	5-15
Figure 5-19	Queue Performance – Displayed as Graph	5-16
Figure 5-20	Queue Performance – Displayed by Hour	5-17
Figure 5-21	Call Center State – Displayed as Table	5-18

Figure 5-22 Call Center State – Display Block 5-19

Figure 5-23 Call Center Summary – Displayed as Table 5-20

Figure 5-24 Call Center Summary – Display Block 5-20

Figure 5-25 Queue Monitor – Display Definition 5-21

Figure 5-26 Queue Monitor – Edit Thresholds 5-22

THIS PAGE INTENTIONALLY LEFT BLANK

Introduction to NEC Contact Center

CHAPTER 1

SECTION 1 OVERVIEW

The NEC Contact Center is a Windows-based software program designed to enhance the Contact Center features of the NEC Telephone System. The software displays both real-time data and historical reports.

Contact Center has many beneficial features:

- ☐ Easy installation
- ☐ Cost-effective call and staff management tool
- ☐ Quick access to both real-time and historical data
- ☐ Easy to read reports and graphs
- ☐ User-friendly screens

Contact Center saves your company money by providing a cost-effective method of capturing, displaying, and reporting Contact Center group call traffic and staff activity. These reporting tools help your company evaluate its staffing requirements and agent performance.

In addition to providing an excellent means of monitoring call activity and agent performance, Contact Center ensures quick access to call traffic reports, wait time reports, and agent time logs. You receive valuable information when you need it in a clear format.

The Contact Center applications can be started from the Links Menu of the NEC Applications.

Due to updates in software after the publication of this document, some of the screen displays shown in this manual and listed features may differ slightly from your version of Contact Center.

SECTION 2 CONTACT CENTER COMPONENTS

Contact Center has four main system components:

- ☐ Contact Center Server
- ☐ Admin Utility
- ☐ Dashboard
- ☐ InControl Contact Center Reports

2.1 CONTACT CENTER Server

The Contact Center Server program is responsible for setting up communication with the NEC Chassis and recording call activity to an external database. There is a SV9100 Contact Center Service that is running at all times so that call records can be properly stored.

NEC recommends that the Server PC be a dedicated system reserved exclusively for Contact Center programs.

Refer to Contact Center, InControl and UC Suite Installation Manual for installation instructions.

2.2 Admin Utility

The Admin Utility is a browser-based application used to associate names with Contact Center queues and Agent IDs. Agent and Queue names defined within the Admin Utility are used in the Dashboard and InControl ACD Reports.

2.3 Dashboard

The Dashboard is a browser-based application that allows the supervisor to monitor the performance of the Call Center in real-time. With the Dashboard, the supervisor can track the activities of individual agents, as well as monitor the efficiency of each queue or the entire call center.

2.4 InControl Contact Center Reports

InControl is a browser-based reporting tool that allows the call center supervisors to generate detailed reports of historical Call Center data. With this utility, the supervisor can analyze the activities of individual agents, as well as survey the efficiency of each queue or the entire call center.

Refer to the SV9100 InControl Call Reporting Manual for more information.

THIS PAGE INTENTIONALLY LEFT BLANK

Logging Into Contact Center Server

CHAPTER 2

SECTION 1 **STARTING CONTACT CENTER SERVER FOR THE FIRST TIME**

To start the Contact Center Server for the first time:

1. From the Windows Start menu, choose **Programs**.
2. Select **NEC, SV9100 Contact Center Suite, Contact Center Service View** from the Contact Center menu.

The following Welcome display appears:

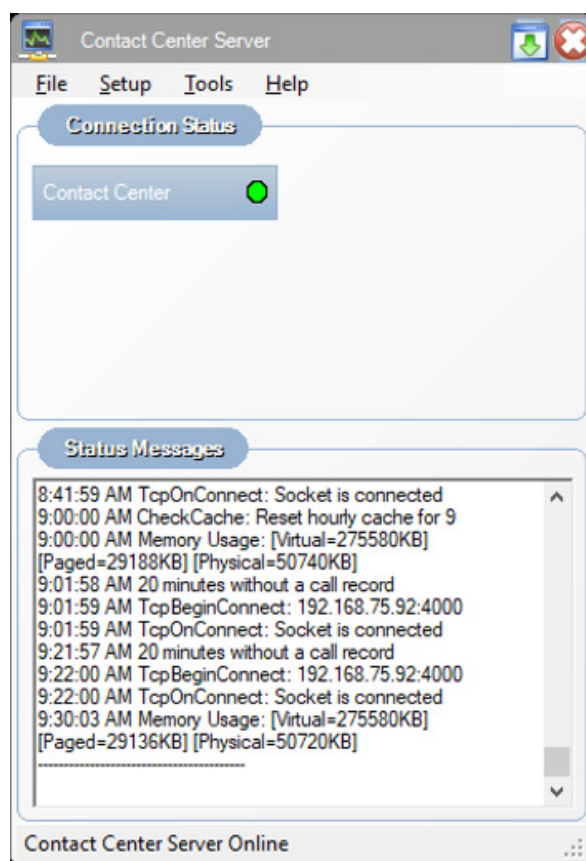


Figure 2-1 Contact Center Server Main Menu

1.1 Describing the Contact Center Server Main Screen

The Main window contains the following information:

Connection Status Box

The Connection Status area of the main window displays information about the resources and utilities that are currently communicating with the Contact Center Server. The different cells in the Connection Status area are defined in the following table.

Label	Description
Contact Center	The indicator is green when the Contact Center Server is connected to the SV9100. The indicator turns yellow if the Contact Center Server fails to receive any data from the CPU for fifteen minutes. If the Contact Center Server loses communication with the SV9100, the indicator is red.

Status Message Box

The Status Messages area displays informational messages about the current Contact Center server activity. Messages include starting/exiting Contact Center utilities, communications errors, etc.

THIS PAGE INTENTIONALLY LEFT BLANK

Configuring Contact Center Server

CHAPTER 3

SECTION 1 TOURING THE MAIN CONTACT CENTER SERVER WINDOW

The Contact Center Server Window contains four menus (File, Setup, Tools and Help) and connection and messages status boxes.

The Contact Center Server program is responsible for setting up communication with the NEC chassis and recording call activity to an external database. Statistics are stored in the database for historical reference. The server should be left running at all times so that call records can be properly stored. The server can run in a foreground or background window.

NEC recommends that the Server PC be a dedicated system reserved exclusively for Contact Center Server program.

SECTION 2 FILE MENU

The File Menu selections are listed in [Figure 3-1 Contact Center Server File Menu](#).

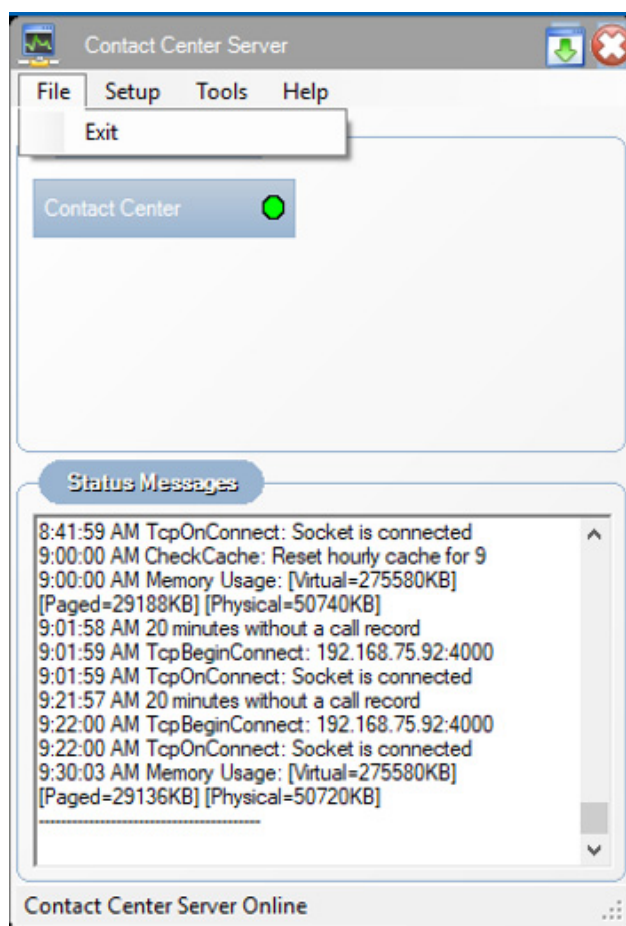


Figure 3-1 Contact Center Server File Menu

2.1 Exit

This function closes the Server application.

SECTION 3 SETUP MENU

The Setup Menu includes five options: Wallboard Serial Port Connectivity Test when a wall display is used, Server Settings, Contact Center Service and License (Retrieve/Cancel request).

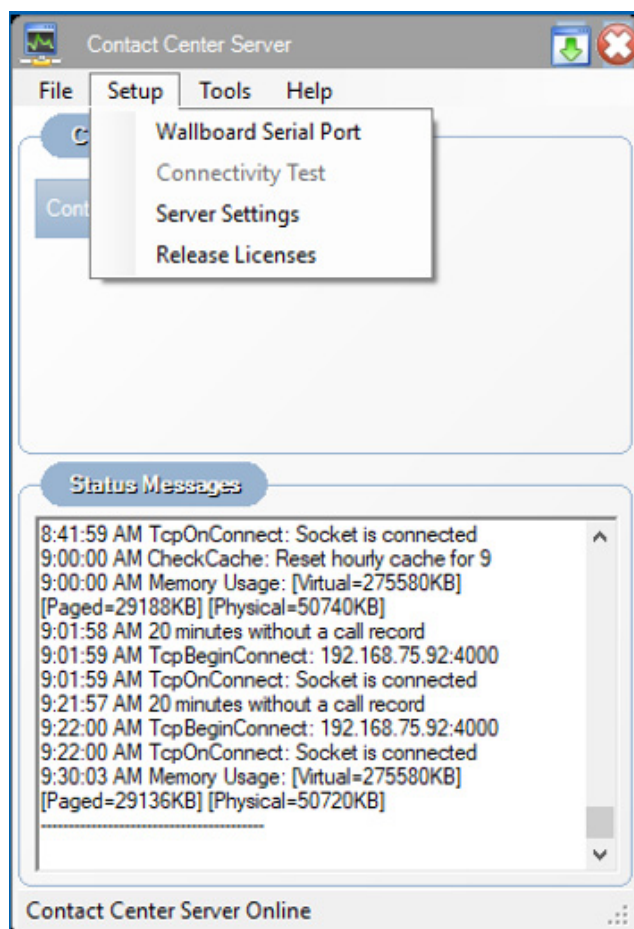


Figure 3-2 Contact Center Server Setup with Wallboard

3.1 Serial Port Setup

When the Serial Port function is selected the following dialog is displayed.

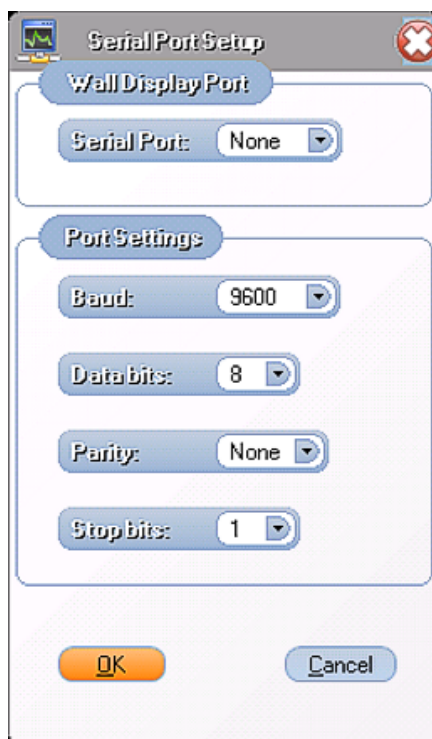


Figure 3-3 Serial Port Setup

This dialog allows the user to select the serial port that is being used to communicate with the wall displays. The default value is None. The user also specifies the Baud rate, Parity, Stop bits and Data bits for the connection with the wall display. The default values for these settings are 9600, N, 8, 1.

When the user updates the serial port settings and exits the menu, the application attempts to initialize the serial port.

3.2 Connectivity Test

The Connectivity Test option allows the user or technician to check the connection between the Contact Center Server PC and the wall displays. When this option is selected, the user selects the wall display that is to be tested and is then presented with the following menu.

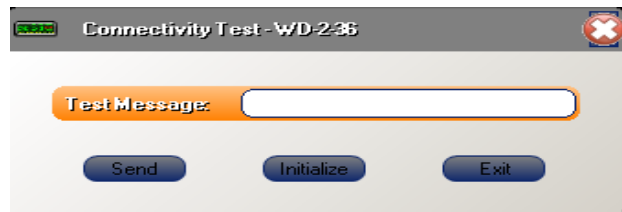


Figure 3-4 Connectivity Test

Selecting the Initialize button sends an initialization string to the wall display. Entering a character string in the Test Message field and then pressing **Send** sends the designated characters to the wall display.

This option is displayed only when a Wall Display is assigned.

3.3 Server Settings

The Server Settings option is used to enter the following:

- TCP/IP port for the HTTP Server
- IP Address and TCP/IP port to communicate with the SV9100

When this option is selected, the following menu is displayed.

The screenshot displays a configuration window titled "Contact Center Server Setup". It is divided into four main sections, each with a header in a dark grey rounded rectangle:

- Telephone System**: Contains an "IP Address" field with the value "192.168.75.92" and a "Prg 10-20-02" field with the value "4000".
- XML Web Access**: Contains a "Prg 90-54-01" field with the value "80", a "Get Names" button, and a status bar at the bottom that reads "Status: Last retrieval 3/5/2020 7:24 AM".
- PBX License Port**: Contains a "Prg 10-47-01" field with the value "6080".
- Contact Center Server**: Contains a "TCP/IP Port" field with the value "9090".

At the bottom of the window are two buttons: an orange "OK" button and a grey "Cancel" button.

Figure 3-5 Contact Center Server Setup

License:

Update the License port used in the SV9100.

Contact Center Server:

TCP/IP port number for the Contact Center Server to communicate with the Contact Center Service.

3.4 Contact Center Service

The Contact Center Service provides Contact Center Server port to communicate with the Contact Center service using .Net remoting. Default port value is set to 9090.

3.5 Release License

The license could manually be released and retrieved from the SV9100. The Contact Center Server automatically gets the licenses during start up and checks with the SV9100 in frequent intervals.

SECTION 4 TOOLS MENU

The Tools menu has three options: Purge, System Backup and System Restore.

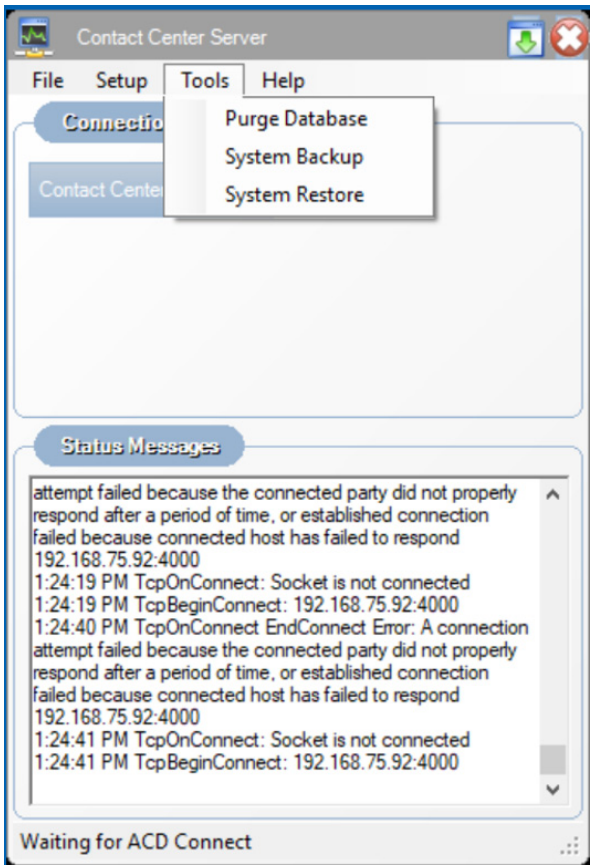



Figure 3-6 Contact Center Tools Menu

- ☐ **Purge**
The Purge option is used to delete records in the database created before a certain date the user can define.
 Once records are purged, they are not recoverable.

- ☐ System Backup

The System Backup option is used to create a backup of the Contact Center database. The default location the System Backup is saved to is

C:\ProgramData\NEC\SV9100 Contact Center Suite.

Backup files will have a file name similar to MIS_3-25-2020.zip.

- ☐ System Restore

The System Restore option is used to restore a previously saved System Backup file. The user can browse to the location of the System Backup file they want to restore.

SECTION 5 HELP MENU

The Help Menu includes two options: Contents and Index and About.

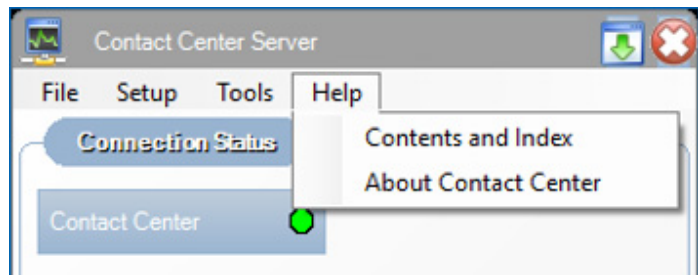


Figure 3-7 Contact Center Server Help

Contents and Index

The Content and Index function is used to open the Windows HTML Help viewer to view the applications Help file. The help file includes information about all features and functions of the application. The help file includes a Table of Contents and Index to help easily locate the desired information.

About

The About function displays a form that shows the product name, current version number, copyright notice, and the license information of activated license(s).

SECTION 1 INTRODUCTION

With Contact Center 2.0 or higher, a new administration utility is used to easily configure settings for both UC Suite and the Contact Center software. This Admin utility is a browser-based application that is installed with the standard UC Suite installation. Contact Center 2.0 requires the UC Suite Services to be installed on the Contact Center server. This Admin Utility replaces the previous Contact Center Admin application.

SECTION 2 BROWSER REQUIREMENTS

The Admin Utility is supported on the following browsers:

- ☐ Mozilla Firefox 50
- ☐ Google Chrome 55
- ☐ Microsoft Edge 38
- ☐ Safari 10 (Mac)

SECTION 3 APPLICATION STARTUP

The user accesses the Admin utility by opening a browser and entering the URL for the UC and Contact Center Web Server followed by “Admin”. The following is an example URL:

<https://192.168.75.104/Admin>

The application will initially display the login page, as shown in the following example.

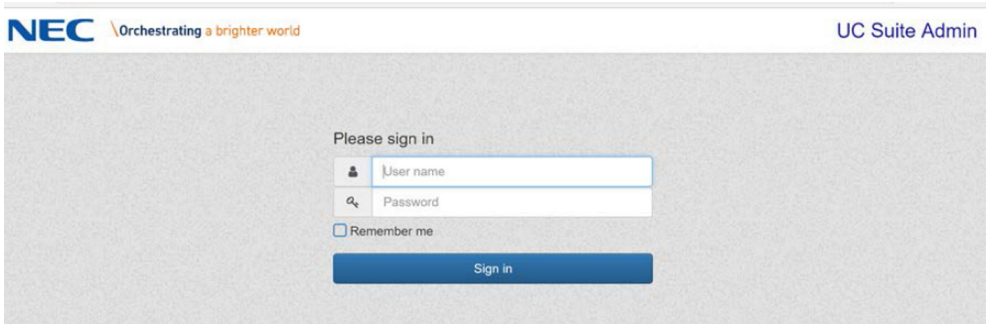


Figure 4-1 Admin Login Screen

To login to Admin, enter a User Name and Password as defined in PRG 90-02. The Account must be setup as either Installer Level, System Administrator A or System Administrator B.

To maintain consistency in the configuration database, only one user can be logged into the Admin utility at any one time.

After successful login, the user will be able to access the configuration settings as described in the following sections.

SECTION 4 ADMIN STRUCTURE

The Admin configuration settings are divided into the following categories:

- ☐ Contact Center
- ☐ Unified Communication
- ☐ Miscellaneous

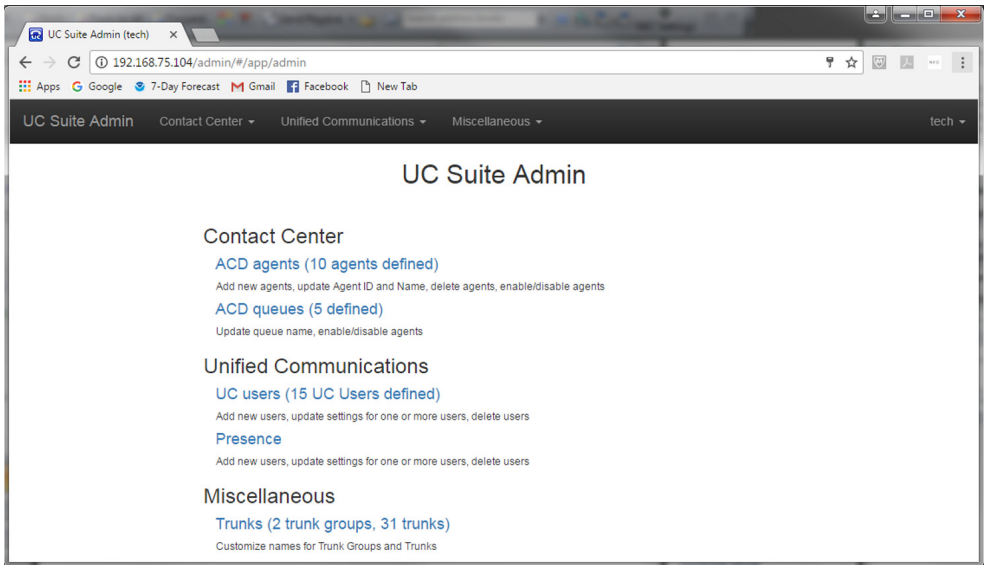


Figure 4-2 Admin Structure

The Contact Center configuration category is described below.

4.1 Contact Center

The Contact Center configuration settings is divided into the following two categories:

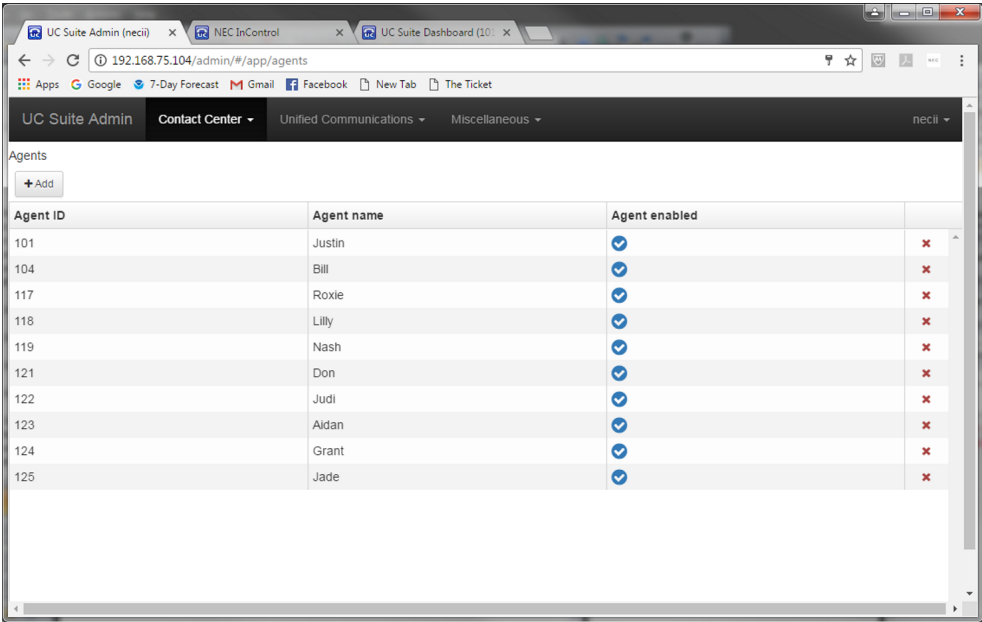
- Agent configuration
- Queue configuration

Each category is further described in the following sections.

4.1.1 Agent Configuration Settings

Agent Configuration allows the user to associate names to agent ID's. The associated names will be used within InControl Reports and Dashboard displays to identify agents.

The Agent Configuration screen will present the agent list in a table, as shown be the following example.



The screenshot shows a web browser window with the URL 192.168.75.104/admin/#/app/agents. The page has a navigation bar with 'UC Suite Admin', 'Contact Center', 'Unified Communications', and 'Miscellaneous'. Below the navigation bar, there is a section titled 'Agents' with an '+ Add' button. The main content is a table with the following data:

Agent ID	Agent name	Agent enabled	
101	Justin	✓	✗
104	Bill	✓	✗
117	Roxie	✓	✗
118	Lilly	✓	✗
119	Nash	✓	✗
121	Don	✓	✗
122	Judi	✓	✗
123	Aidan	✓	✗
124	Grant	✓	✗
125	Jade	✓	✗

Figure 4-3 Agent List

Clicking on an entry in the Agent Name column switches the selected entry to Edit mode. The user can then update the name associated with that User ID. The red “X” on the right end of the table can be used to remove an entry from the table. When changes are made, Save and Cancel buttons will be displayed. The Save button will apply the changes, while the Cancel button will discard any changes to the Agent names.

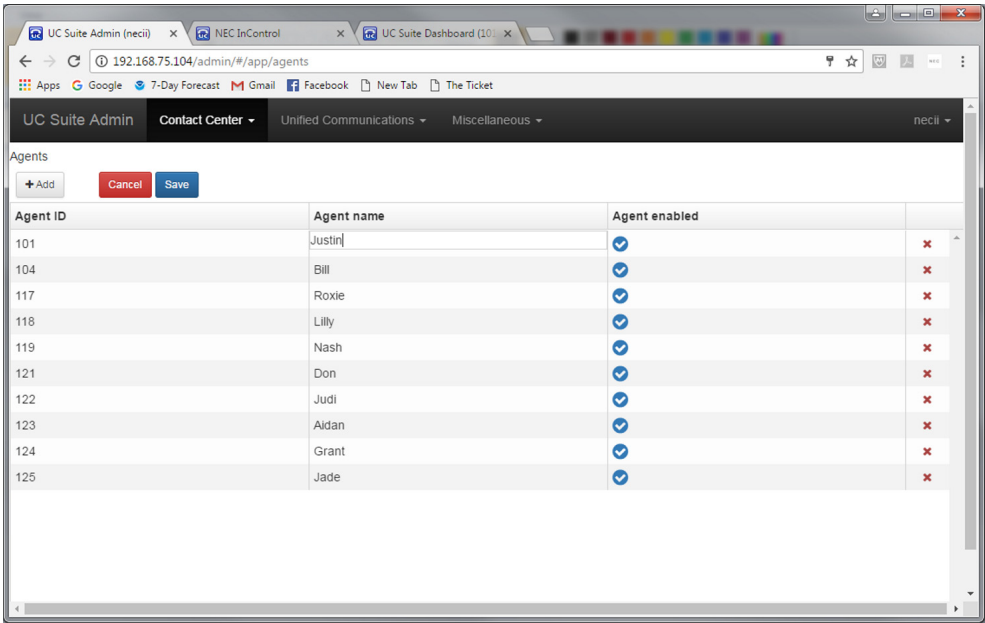


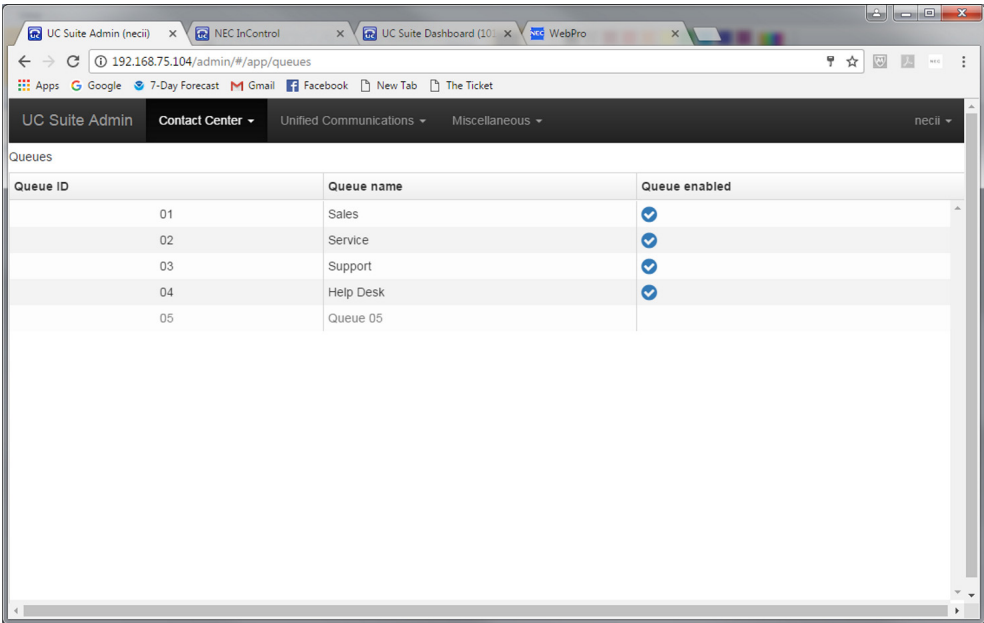
Figure 4-4 Agent Name

The ability to add a user to the list will only be presented if the Contact Center configuration supports the use of general Agent ID's as determined by PRG 41-01-06. If this setting is enabled, then only the Agent ID's set in PRG 41-21 is displayed.

4.1.2 Queue Configuration Settings

This section of the Admin utility allows the user to associate names to each Contact Center queue. The queue names are used within the InControl Contact Center reports and within the Dashboard displays.

The list of queues are displayed in a table, as shown in the following example.



The screenshot shows a web browser window with multiple tabs. The active tab is 'UC Suite Admin (neci)'. The address bar shows '192.168.75.104/admin/#/app/queues'. The navigation bar has 'UC Suite Admin' selected, with other options like 'Contact Center', 'Unified Communications', and 'Miscellaneous'. Below the navigation bar, the 'Queues' section is displayed. It contains a table with three columns: 'Queue ID', 'Queue name', and 'Queue enabled'. The table lists five queues: 01 (Sales), 02 (Service), 03 (Support), 04 (Help Desk), and 05 (Queue 05). Each queue has a blue checkmark in the 'Queue enabled' column.

Queue ID	Queue name	Queue enabled
01	Sales	<input checked="" type="checkbox"/>
02	Service	<input checked="" type="checkbox"/>
03	Support	<input checked="" type="checkbox"/>
04	Help Desk	<input checked="" type="checkbox"/>
05	Queue 05	<input type="checkbox"/>

Figure 4-5 List of Queues

Clicking on an entry in the Queue Name column switches the selected entry to Edit mode. The user can then update the name associated with that queue. When changes are made, Save and Cancel buttons will be displayed. The Save button will apply the changes, while the Cancel button will discard any changes to the Queue names.

4.2 United Communications

The Unified Communications configuration settings is divided into the following two categories:

- UC User configuration
- Presence configuration

The Contact Center related settings are described in the following section. Refer to the UC Suite Manual for more information on other UC User settings and Presence Configuration settings.

4.2.1 UC User Configuration Settings

The UC User Configuration section determines if a user has access to the Contact Center Dashboard and InControl reports. Shown below is an example of the UC Users screen.



























	User name	Extension	Softphone ext.	License level	Access InControl	Access Dashboard	Agent?	
✓	Ross	2930		Premium				  
✓	Tim	2931		Premium				  
✓	2932	2932		Advanced				  
✓	Ryan	2933		Premium				  
✓	Dave	2935						  

Figure 4-6 List of UC Users

By default, the main table displays the following settings for each UC user:

- ☐ User name (PRG 20-59-01)
- ☐ Extension (PRG 20-59-05)
- ☐ License level (Premium, Advanced, Blank/Standard)
- ☐ Access InControl (Enabled will display graph icon, disabled will be blank)

- ☐ Access Dashboard (Enabled will display speedometer icon, disabled will be blank)
- ☐ Agent? Enabled to give users Contact Center Agent functionality in the UC Suite clients. (Enabled will display headset icon, disabled will be blank)

A configuration icon is shown on the right side of the headers allowing the user to enable/disable the display of individual columns.

The table is populated with all of the UC users currently defined within PRG 20-59.

Operations available for the UC User list include the following:

- ☐ Add New User
- ☐ Edit Existing User
- ☐ Copy Existing User
- ☐ Delete Existing User
- ☐ Import Users

Each of these operations is further defined in the following sections.

4.2.1.1 Add New User

Selecting the Add feature opens a form allowing the administrator to define a new UC user. When the new user entry is saved, the SV9100 programming settings are written to a free entry within PRG 20-59.

The new user menu provides a Save button to add the new user and a Cancel button to close the menu without saving the new user.

4.2.1.2 Edit Existing User

Selecting the Edit function opens the user definition menu with the fields pre-filled with the current settings for the selected user. The administrator is able to update any of the fields on the menu. Selecting the Save button applies the changes, while pressing the Cancel button closes the menu without saving the changes.

4.2.1.3 Copy Existing User

The Copy feature allows the user to create a new user entry based upon the settings setup for an existing user. Selecting the Copy function opens the user definition menu with fields pre-filled with the current settings for the selected user, except for the User name field. The administrator can then create a new user with the same settings by entering a new User name, password and extension. The Save function will create the new user, while the Cancel function closes the menu without saving the new user.

4.2.1.4 Delete Existing User

Selecting the Delete function will pop a confirmation dialog to verify that the selected user can be removed from the database. Selecting Yes clears the user definition from the SV9100 system programming. Selecting No closes the confirmation dialog without removing the user.

4.2.1.5 Import Users

The Import Users function provides a shortcut to add a block of users at one time. Selecting the Import Users function opens a list of all the unassigned Extension numbers that are defined in the system. The user can select one or several extensions by clicking on the checkbox at the start of the row. Clicking on the Import button will create a new entry for each of the selected extensions and pre-fill the definition with default settings. The administrator can then edit each entry to add a User name, Password and adjust any of the custom settings.

4.3 Miscellaneous

The Miscellaneous category provides access to only one additional group of configuration settings relating to Trunks. Selecting the Trunk option displays a list of all trunks defined in the SV9100. The following image shows an example of the Trunks configuration menu.













Trunk Group number	Trunk Group name	Trunk number	Trunk name
1	 SIP Trunks		
		84	
		85	
		86	
		87	
		88	
		89	
2	 Tie to 3C		
		98	
		99	
		100	
		101	

Figure 4-7 Trunks Configuration Menu

From this menu, the user has the ability to assign a name to the Trunk Groups and Individual Trunks. Clicking on the Edit icon changes the name field to an editable field, allowing the user to modify the text.

The Trunk Group names and Trunk names are used within the Trunk Utilization reports that are generated by the InControl application.

4.4 License Level Alert

The Admin utility monitors the number Contact Center licenses that are available within the SV9100. Admin will display an alert when the number of users provisioned for a license is greater than the number of licenses available within the SV9100. The alert indicator is shown in the top menu bar of the application, as shown in the following example.

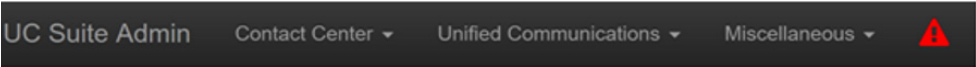


Figure 4-8 License Level Alert

Hovering the mouse over the Alert indicator will display a pop up message which provides the details of the alert. The following image shows an example of the alert message.

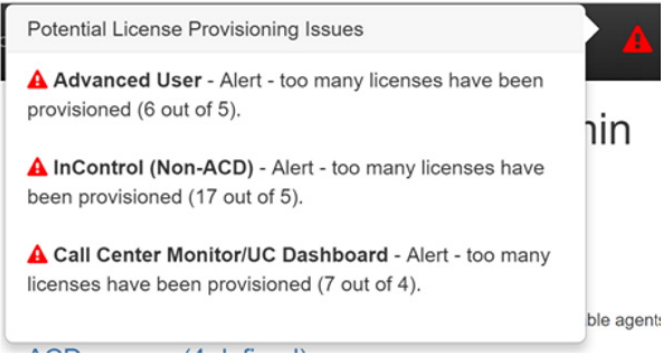


Figure 4-9 Alert Popup

The alert feature monitors the following license levels:

- InControl User (5327)
- Agent Client (2104)
- Contact Center Supervisor (2103)

4.5 Additional Features

The Admin main menu also provides access to additional features through a drop-down list that is associated with the text that displays the admin login ID. Clicking on this control will open a drop-down menu that provides the following options:

- Refresh from PBX – read the current settings from the SV9100 system programming to ensure that the Admin view is current.
- Sign out – log out of the Admin application.
- Help – display help topics for this application.
- About – display the product name and version number.

THIS PAGE INTENTIONALLY LEFT BLANK

SECTION 1 INTRODUCTION

With Contact Center 2.0, a new utility called Dashboard is used for monitoring the performance of the call center in real-time. Dashboard is a browser-based application that provides a flexible layout structure, so that supervisors can customize the real-time content they are viewing. The supervisor can position different data elements within their custom layout.

SECTION 2 BROWSER REQUIREMENTS

The Dashboard is supported on the following browsers:

- ☐ Mozilla Firefox 50
- ☐ Google Chrome 55
- ☐ Internet Explorer 11
- ☐ Microsoft Edge 38
- ☐ Safari 10 (Mac)

SECTION 3 APPLICATION LICENSING

The following licenses will be required to run the Contact Center Dashboard:

- ☐ ACD-MIS Basic – 2102
- ☐ ACD-MIS Additional Monitor – 2103

SECTION 4 APPLICATION STARTUP

The user will access the Contact Center Dashboard by opening a browser and entering the URL for the Contact Center Server followed by “Dashboard”. The following is an example URL:

```
https://192.168.75.104/Dashboard
```

The application will initially display the login page, as shown in the following example.

To login to the Dashboard, the user must be setup as a UC User in MB 20-59 of the SV9100. The user must also be assigned the privilege to run Contact Center applications as a supervisor through the Admin application.

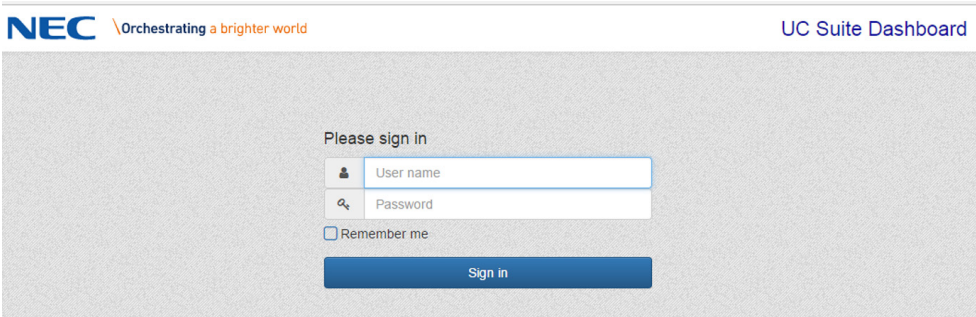


Figure 5-1 Dashboard Login Screen

If the user is already logged into the UC Web Client or InControl, then when the Dashboard is accessed the user will automatically be logged in using the same account credentials.

After successfully logging into Dashboard, a user will be able to construct a contact center monitor page showing real-time statistics for the call center. The following section describes the layout of the Dashboard application.

SECTION 5 DASHBOARD APPLICATION STRUCTURE

The Dashboard provides the Contact Center supervisor with the ability to create a custom layout of real-time data windows. The following image shows an example of the Dashboard user interface after the user starts the application for the first time.

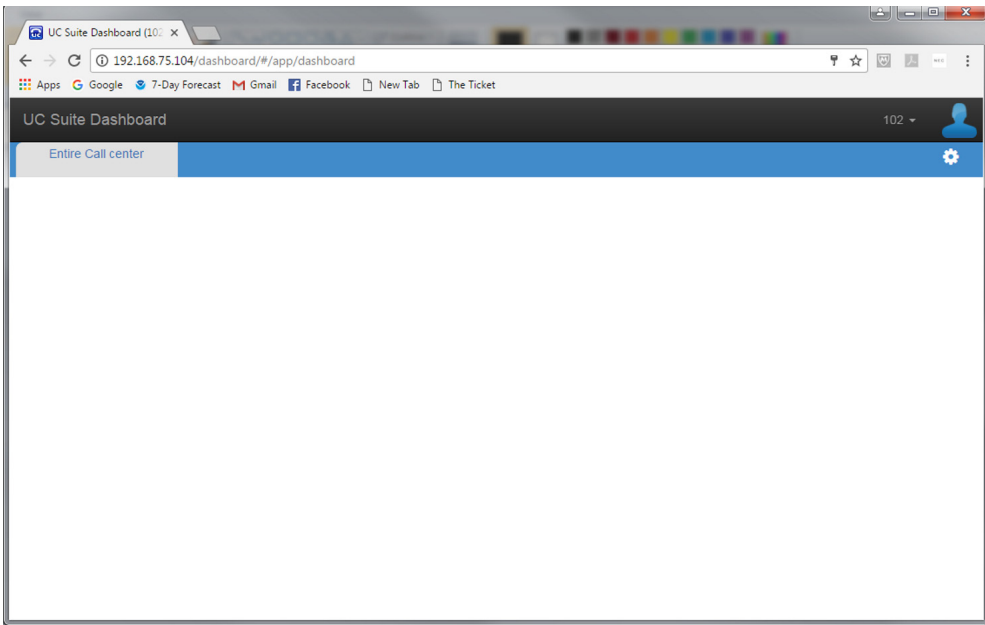


Figure 5-2 Dashboard – Screen Layout

Below is an example of the Dashboard with configured tabs and displays.

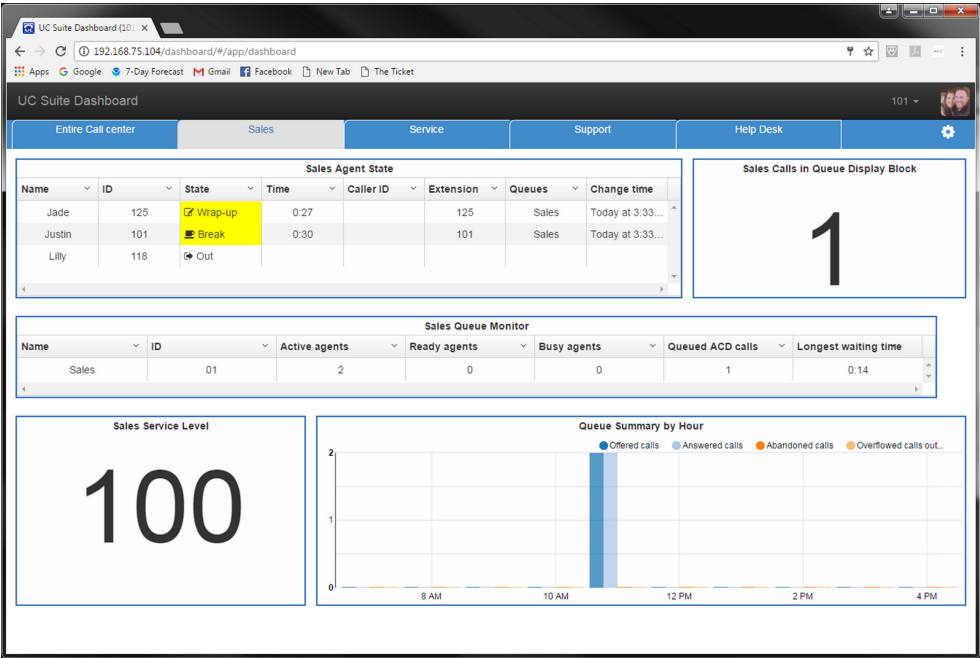


Figure 5-3 Example of Configured Dashboard

- Title Bar
- Tab Control
- Display Area

Each of these elements is further described in the following sections.

5.1 Title Bar

The Title Bar area shows the application name and identifies the currently logged in user. The following image shows an example of the Title Bar.



Figure 5-4 Example of Dashboard Title Bar

In the above image the Title bar shows the extension number of the logged in user and associated Profile photo (if available).

Clicking on the Extension opens a drop down window with the following options:

- ☐ Settings – allows the user to enable/disable audio alerts for thresholds and restore the layout from a previous session.
- ☐ Sign Out – logs out of the application.
- ☐ Help – displays information on the use of the product.
- ☐ About – shows the version number and copyright notice.

5.2 Tab Control Area

The Tab Control area shows the different views that the user has created. Each tab represents a different layout of real-time data windows, as created by the user. Clicking on a tab changes the current view to the selected tab. The following image shows a single tab that is automatically created when the user initially starts the application.



Figure 5-5 Example of Dashboard Single Tab

The Tab Control area also allows the user to switch between the view mode and edit mode. This is controlled by the gear icon on the far right side of the Tab Control area.

When the Tab Control area is blue and the icon is shown as a gear, the Display area is in View mode. Clicking on the gear icon will toggle the Tab Control to be in Edit mode as shown below.



Figure 5-6 Dashboard Edit Mode

In Edit mode, the Tab Control area is brown and the user can:

- ☐ Rename a Tab
- ☐ Add a new Tab
- ☐ Re-order the Tabs
- ☐ Delete a Tab
- ☐ Add new Display windows
- ☐ Delete existing Display windows

Clicking on a Tab name places the Tab into edit mode as shown in the following example:



Figure 5-7 Tab Name in Edit Mode

The double arrow icon can be used to drag the tab to a new location. The X icon can be used to delete the selected Tab. Selecting the Tab name allows the user to enter/edit the Tab name.

The Plus icon on the far right side of the Tab Control area opens a drop down list that shows all of the Display types that can be added to the Tab. The following Display types are available:

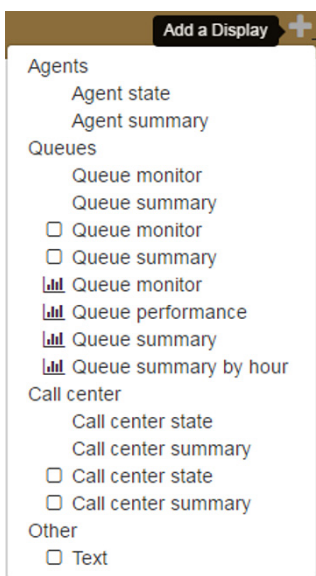


Figure 5-8 Display Types

Each of these Display types are described in the following sections.

5.3 Display Area

The Display Area holds all of the individual Display windows that the user has defined. When in Edit mode the user is able to move the individual windows, resize the windows, re-arrange the columns, and remove a display. The following image shows an example of a Display window in Edit mode.

Sales Agents							
Name	ID	State	Time	Extension	Queues	Change time	
Jade	125	Out					
Justin	101	Ready	8:14	101	Sales	Today at 9:29 AM	
Lilly	118	Break	0:29	118	Sales	Today at 9:37 AM	

Figure 5-9 Display Window in Edit Mode

The controls in the top right corner of the window can be used to drag the form to a new location and to edit the settings for the selected window.



Figure 5-10 Dashboard Controls

- Clicking and holding the two directional arrow is used to move a display window to another tab.
- Clicking and holding the four directional arrow is used to drag a display window to a different location on the same tab.
- The pencil icon opens the edit window for the display window allowing the user to change its properties.
- The downward sweeping arrow is used to create a new row with the selected display window.
- The X deletes the display window from the tab.

SECTION 6 **DISPLAY TYPES**

The Dashboard Displays are organized into the following categories:

- ☐ Agent Displays
- ☐ Queue Displays
- ☐ Call Center Displays
- ☐ Other Displays

Each of these Display categories are described in the following sections.

6.1 Agent Display Types

This category of Displays allows the Contact Center supervisor the ability to monitor the activities of a set of agents. The following types of agent displays are available:

- ☐ Agent State
- ☐ Agent Summary

Each display is further described in the following sections.

6.1.1 Agent State Display

This display monitors the current call center state for each agent included within the display. For each agent, this display includes the following fields:

- ☐ Agent Name
- ☐ Agent ID
- ☐ Current State – With UC 7 and Contact Center 3 or higher, the State field will show customer break modes defined in Admin Utility.

- ☐ Time in State
- ☐ Caller ID of current call
- ☐ Agent Extension
- ☐ Logged in Queue
- ☐ State change time

An example of the Agent State Display is shown below.

Agent States							
Name	ID	State	Time	Caller ID	Extension	Queues	Change time
Broomhilda W	3111	Out					
Gretta Deeog	3102	Break	0:17		3102	Widgets	Today at 10:23 AM
Jimmy Allen	3030	Staff Meeting	5:12		3030	Widgets	Today at 10:18 AM
Justin Tune	3018	Ready	3:28		3018	Widgets	Today at 10:20 AM
Shoopey Dupe	3116	Helping another agent	4:13		3116	Widgets	Today at 10:19 AM

Figure 5-11 Example of Agent State

6.1.2 Agent Summary Display

This display tabulates the running totals for the agent call activities. For each agent, this display includes the following fields:

- ☐ Agent Name
- ☐ Agent ID
- ☐ Login Time
- ☐ ACD call count
- ☐ Total ACD call time
- ☐ Average ACD call time
- ☐ Average Non-ACD call time
- ☐ Total break time
- ☐ Average break time
- ☐ Average wrap time



With UC 7 and CC 3 or higher, the sum for Total Break Time and Calculation for Average Break Time includes all instances when an agent selected a break mode, custom or default.

An example of the Agent Summary Display is shown below.

Sales Agent Summary										
Name	ID	Login time	ACD calls	Total ACD talk t...	Avg. ACD call t...	Avg. non-ACD t...	Total break tim...	Avg. break time	Avg. wrap-up t...	
Jade	125	38:59	1	1:15	1:15	0:00	2:45	2:45	0:00	
Justin	101	1:08:08	1	0:58	0:58	0:00	0:00	0:00	0:16	
Lilly	118	1:00:30	1	0:07	0:07	0:00	58:29	58:29	0:00	

Figure 5-12 Example of Agent Summary

6.2 Queue Displays

This category of displays allows the Contact Center supervisor the ability to monitor the real-time statistics of each queue. The following types of queue displays are available:

- Queue Monitor (Table/Block/Graph)
- Queue Summary (Table/Block/Graph)
- Queue Performance (Graph)
- Queue Summary by Hour (Graph)

Each of these displays is further described in the following sections.

6.2.1 Queue Monitor Display

This display provides call totals and averages for the queues. The following fields are available to be included in this display for each queue:

- ☐ Queue Name
- ☐ Queue ID

- ☐ Queue State
- ☐ Active Agent Count
- ☐ Ready Agent Count
- ☐ Busy Agent Count
- ☐ Queued ACD Call Count
- ☐ Longest Wait Time

This display can be created as a table, as a graph or one statistic can be shown in a single Display Block.

Below is an example of the Queue Monitor Display as a table.

Sales Queue Monitor							
Name	ID	Active agents	Ready agents	Busy agents	Queued ACD calls	Longest waiting time	
Sales	01	3	2	1	0	0.00	

Figure 5-13 Queue Monitor – Displayed as Table

Below is an example of the Queue Monitor Display with one statistic in a Display Block.

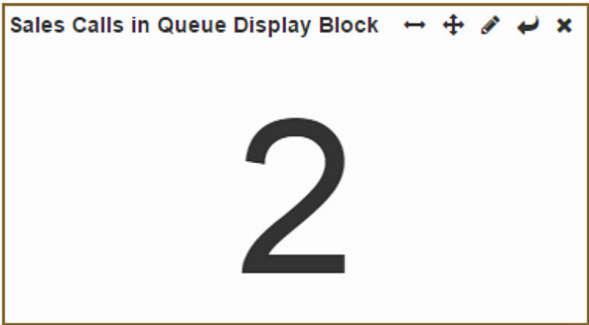


Figure 5-14 Queue Monitor – Display Block

Below is an example of the Queue Monitor Display as a graph. Hovering the mouse over the graph will open a tool tip window with more details.

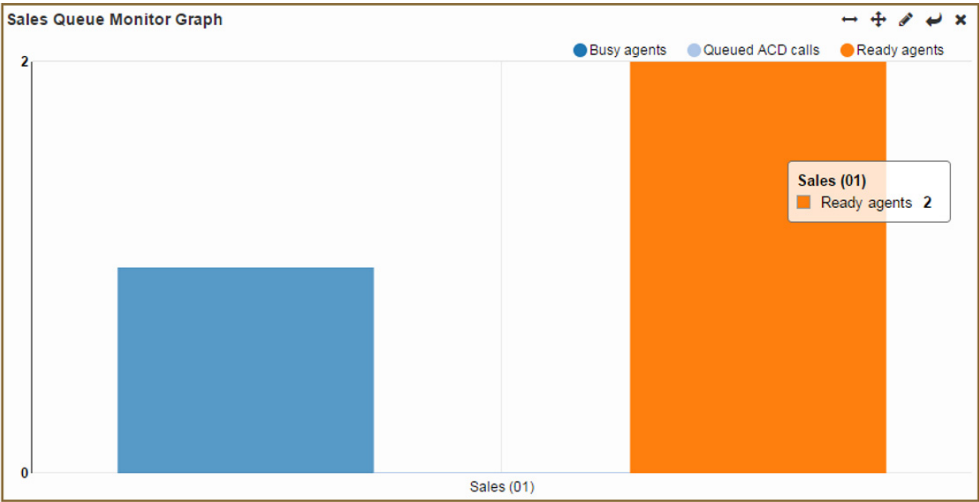


Figure 5-15 Queue Monitor – Displayed as Graph

6.2.2 Queue Summary Display

This display provides call totals and averages for selected queues. The following fields are available to be included in this display.

- ☐ Queue Name
- ☐ Queue ID
- ☐ Calls Offered
- ☐ Calls Answered
- ☐ Calls Abandoned
- ☐ Overflowed Out Calls
- ☐ Overflowed In Calls
- ☐ Dialed Out Calls
- ☐ Average ACD Call Length

- ☐ Average Answer Time
- ☐ Average Abandon Time
- ☐ Percent Abandoned
- ☐ Calls Abandoned after Threshold
- ☐ Calls Answered after Threshold
- ☐ Percent Abandoned after Threshold
- ☐ Percent Answered after Threshold
- ☐ Service Level

This display can be created as a table, as a graph, or one statistic can be shown in a single Display Block.

Below is an example of the Queue Summary Display as a table.

Sales Queue Summary Table										
Name	Offered calls	Answered ca...	Abandoned %	Overflowed c...	Calls dialed %	Avg. ACD cal...	Avg. answer %	Avg. abando...	% Abandone...	Service level
Sales	9	5	3	0	0	1:20	0:41	1:27	33	80

Figure 5-16 Queue Summary – Displayed as Table

Below is an example of the Queue Summary Display with one statistic in a Display Block.

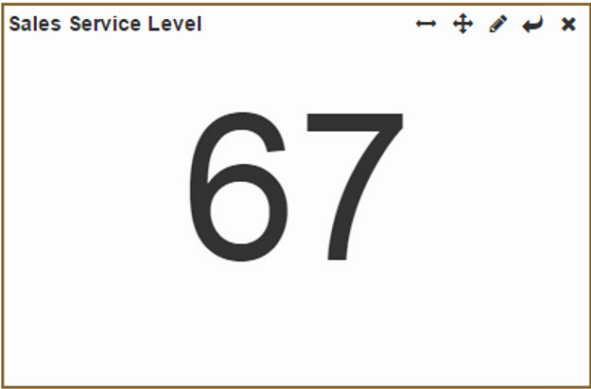


Figure 5-17 Queue Summary – Display Block

Below is an example of the Queue Summary Display as a graph. Hovering the mouse over the graph will open a tool tip window with more details.

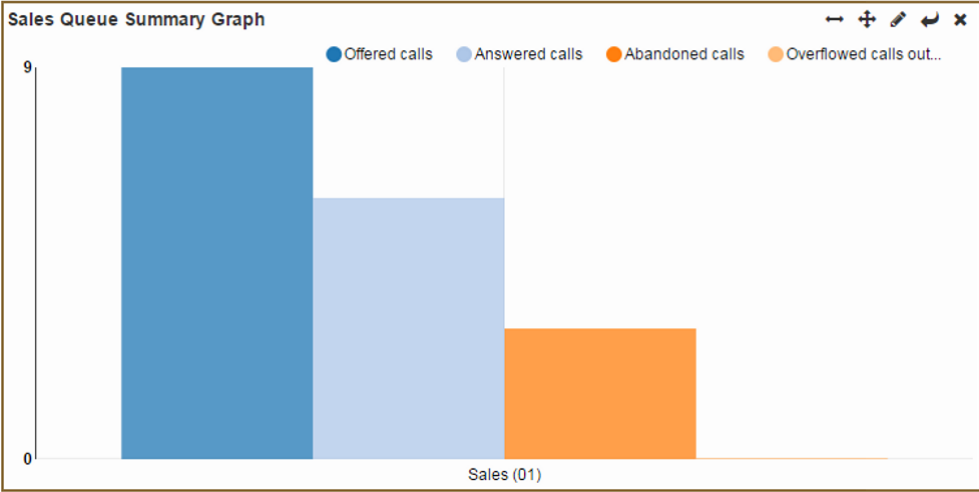


Figure 5-18 Queue Summary – Displayed as Graph

6.2.3 Queue Performance Display

This display provides call averages and wait time for a queue. The following fields are included in this display.

- ☐ Queue Name
- ☐ Queue ID
- ☐ Average ACD Call Length
- ☐ Average Answer Time
- ☐ Average Abandon Time
- ☐ Longest Wait Time

Below is an example of the Queue Performance Display.

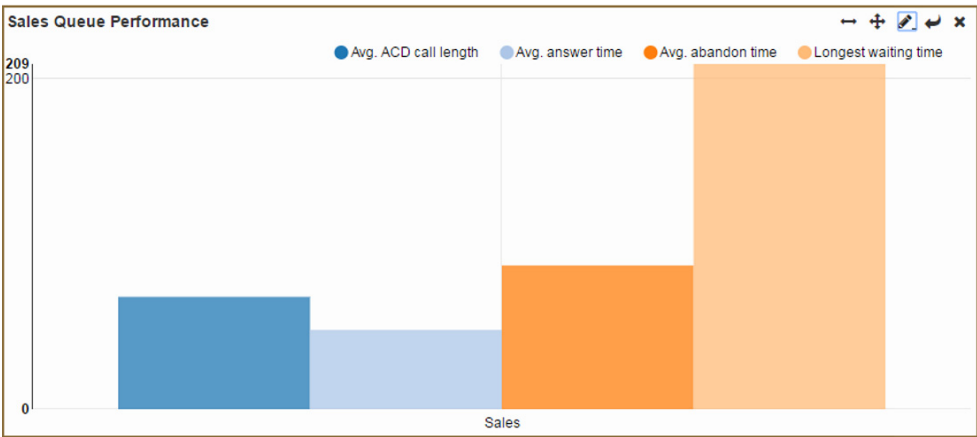


Figure 5-19 Queue Performance – Displayed as Graph

6.2.4 Queue Summary by Hour

This display provides call totals as accumulated per hourly interval. The following fields are included in this display.

- ☐ Queue Name
- ☐ Calls Offered
- ☐ Calls Answered
- ☐ Calls Abandoned
- ☐ Calls Overflowed out of Queue

Below is an example of the Queue Performance by Hour Display.

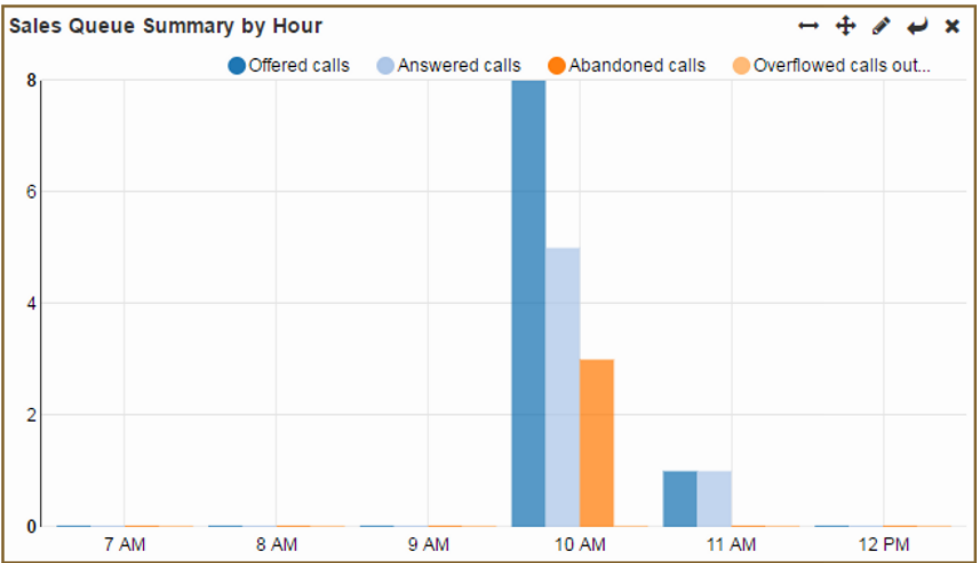


Figure 5-20 Queue Performance – Displayed by Hour

6.3 Call Center Displays

This category of displays allows the Contact Center supervisor the ability to monitor the real-time statistics for all call activity within contact center. The following types of call center displays are available:

- Call Center State (Table/Block)
- Call Center Summary (Table/Block)

Each of these displays is further described in the following sections.

6.3.1 Call Center State Displays

This display provides real-time totals for all calls within the Contact Center. The following fields are included in this display.

- ☐ Active Agents
- ☐ Busy Agents
- ☐ Agents on Non-ACD Calls
- ☐ Agents on Break
- ☐ Agents in Wrap
- ☐ Ready Agents
- ☐ Queued ACD Calls

These fields can be displayed in both table format or as an individual statistic within a display block.

Below is an example of the Call Center State display in table format.

Contact Center State							
Name	Active agents	Busy agents	Agents on non-ACD calls	Agents on break	Agents in wrap-up	Ready agents	Queued ACD calls
CallCenter	3	0	0	2	0	1	0

Figure 5-21 Call Center State – Displayed as Table

Below is an example of the Call Center State display with one statistic in a Display Block.



Figure 5-22 Call Center State – Display Block

6.3.2 Call Center Summary Display

This display provides call counts as accumulated within a specific time interval. The available intervals are 15 minutes, 1 hour, 4 hours, 8 hours, 12 hours and 24 hours. The following fields are included in this display type.

- ☐ Calls Offered
- ☐ Calls Answered
- ☐ Calls Abandoned

These fields can be displayed in both table format or as an individual statistic within a display block.

Below is an example of the Call Center Summary display in table format.

Call Center Summary			
Name	Offered calls	Answered calls	Abandoned calls
Call Center	9	6	3

Figure 5-23 Call Center Summary – Displayed as Table

Below is an example of the Call Center Summary display with one statistic in a Display Block.



Figure 5-24 Call Center Summary – Display Block

SECTION 7 DISPLAY DEFINITION

Selecting a Display type in Edit mode allows the user to define a new Display window. The Display definition is provided through a menu which requests all of the values required to format the display. The following image shows an example of the Queue Monitor display definition.

The screenshot shows a web-based form titled "Queue monitor" with a close button (X) in the top right corner. The form contains the following sections:

- Name ***: A text input field containing "Sales Queue Monitor".
- ☒ **Show Name as title**
- Queues ***: A dropdown menu with the following options: "Help Desk", "Queue 05", "Sales" (highlighted), and "Service".
- Display Fields ***: A row of checkboxes, all of which are checked: "Name", "ID", "Active agents", "Ready agents", "Busy agents", "Queued ACD calls", and "Longest waiting time".
- Edit Thresholds**: A button located below the Display Fields section.
- Buttons**: "Cancel" and "Save" buttons are located at the bottom right of the form.

Figure 5-25 Queue Monitor – Display Definition

After filling in the required data fields, selecting the Save button will apply the display definition and the new display will be shown within the current Tab. Clicking on the Cancel button will close the display definition menu without creating a new display.

SECTION 8 EDIT THRESHOLDS

Selecting the Edit Thresholds button within a Display Definition window allows the user to set threshold levels for the specific values in the display. The user can define two threshold levels and select the background color to be used in the table cell or block when the threshold levels are reached. The following image shows an example of the Queue Monitor Edit Thresholds window.

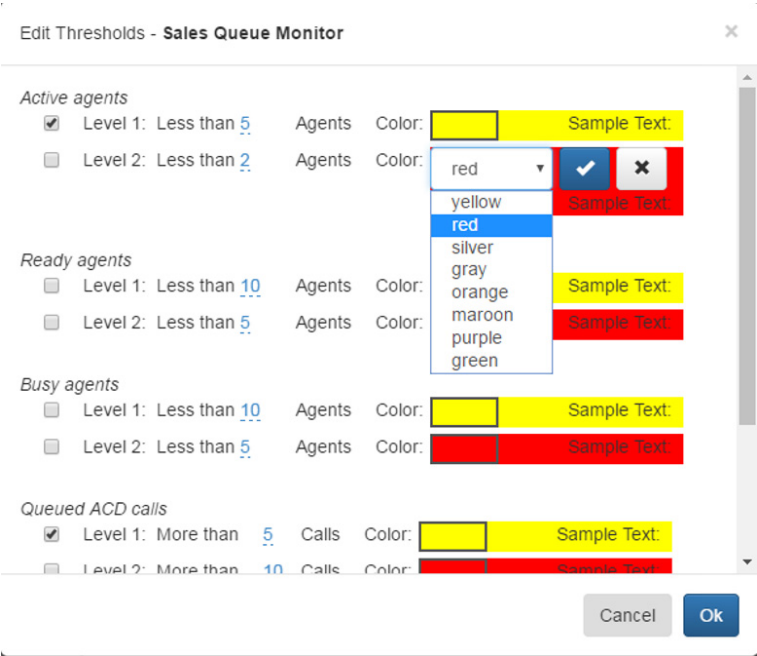


Figure 5-26 Queue Monitor – Edit Thresholds

Checking the check box enables the threshold level. Clicking the blue number hyperlink allows the user to edit the threshold number. Clicking in the color box allows the user to select a threshold color from the drop down box. The check button saves the color and the X button cancels the change. Clicking OK saves the changes to the thresholds for the display. Clicking Cancel closes the Edit Thresholds window and discards any changes.

THIS PAGE INTENTIONALLY LEFT BLANK



CONTACT CENTER SUPERVISOR MANUAL