



Business Edition User Guide

BroadSoft® Guide

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About This Guide

This guide explains how to use the features of the BroadSoft® CC-One Business Edition service to control and monitor how calls are distributed across your enterprise, silently monitor calls directed to any site, and view real-time call center statistics, key performance measures, and historical reports.

Who Should Read This Guide

This guide is intended for telecom managers, call center managers, customer care executives, business analysts, and other individuals who use the CC-One service to administer, support, manage, or evaluate call center operations.

How This Guide Is Organized

The chapters in this guide provide the following information:

Chapter 1, “Introduction,” provides an overview of the CC-One service.

Chapter 2, “Getting Started,” explains how to sign in to the CC-One Management Portal, access the CC-One components, perform basic operations, and get help while you work. The chapter also explains how to use the features available in the Password Reset, Unlock Agent, Release Notes, Usage Metrics Report, and Web Callback Request Report modules.

Chapter 3, “Contact Routing,” provides an overview of BroadSoft’s approach to call distribution in a multi-sourced network and explains how to create scheduled routing and team capacity strategies and alter them in real time to optimize call delivery, assign call flows, and create routing sequences. It also explains how to create call control scripts and audio files and make them available for use in routing strategies.



Chapter 4, “Real-Time Reports,” describes the available real-time data elements and explains how to create and modify custom real-time reports, download real-time data to a data-analysis tool, and customize the ticker (the scrolling text area at the top of real-time report pages that displays status information). The chapter also describes how authorized users can monitor threshold alerts.

Chapter 5, “Call Monitoring,” explains how to participate in silent monitoring sessions for selected voice calls, as well as how to provide instructions to the agent being monitored without being heard by the caller, and how to join a call that is being monitored and participate in the conversation.

Chapter 6, “Historical Reports,” describes the historical data elements that are available and explains how to display historical call, agent, skill, threshold alert, and auxiliary reports and how to create and modify custom historical reports.

Chapter 7, “Call Recording,” explains how to use the features of the optional Call Recording module to record any active call that is managed by the CC-One service.

Chapter 8, “Jukebox,” explains how to use the features of the optional CC-One Jukebox module to search for and play audio files recorded through the CC-One Call Recording feature and how authorized users can create tags that can be assigned to audio files for use as search criteria, specify which CAD variables to store with recordings, create custom attributes, and view recent Jukebox activity.

Chapter 9, “Provisioning CC-One Resources,” explains how to view the tenant settings provisioned for the enterprise as well as how to view, edit, or create other provisioned resources based on user access privileges, such as Management Portal user accounts, entry points, DN to entry point mappings, queues, sites, threshold rules, skills and skill profiles, multimedia profiles, teams, wrap-up and idle codes and work types to associate them with, address books, agent profiles, agent accounts, business metrics, and named variables that can be used in call control scripts. This module also provides access to the Audit Trail tool, which enables authorized users to view database changes made during a specified time period, and the Agent Skill Report, Provisioned Items Report, and Provisioned Skills Report.

Chapter 10, “CC-One Agent Desktop,” explains how to use the CC-One Agent Desktop to handle customer calls.

Chapter 11, “Seatmap,” explains how to use the features of the optional Seatmap module, which provides real-time visibility into agent activity and enables authorized users to map groups of agents into views for monitoring.

Chapter 12, “Troubleshooting,” provides a list of troubleshooting tips for both the CC-One Management Portal and the Agent Desktop.

Appendix A, “CC-One Report Parameters,” describes the parameters available in CC-One reports.

A glossary and index are included at the back of this guide.



Introduction

The BroadSoft® CC-One service enables your enterprise to cost-effectively manage disparate call centers across geographical and organizational boundaries with control, visibility, and quality. This chapter provides an overview of the CC-One service and its features.

Topics covered in this chapter:

- [CC-One Overview](#)
- [About Sites, Teams, Entry Points, and Queues](#)
- [CC-One Management Portal](#)
- [CC-One Modules](#)
- [About Time Zones](#)
- [Management Portal Navigation](#)

CC-One Overview

Multi-sourcing enterprises leverage a combination of sourcing solutions, including captive, outsourced, and offshore. The typical multi-source environment is organizationally very complex, consisting of sites located all over the world and staffed by direct company employees and outsourced agents.

In this environment, most locations operate independently and use disparate call center technologies, including routing, administrative solutions, and reporting tools. This combination of tools and technologies makes both management and quality monitoring across different locations extremely challenging.

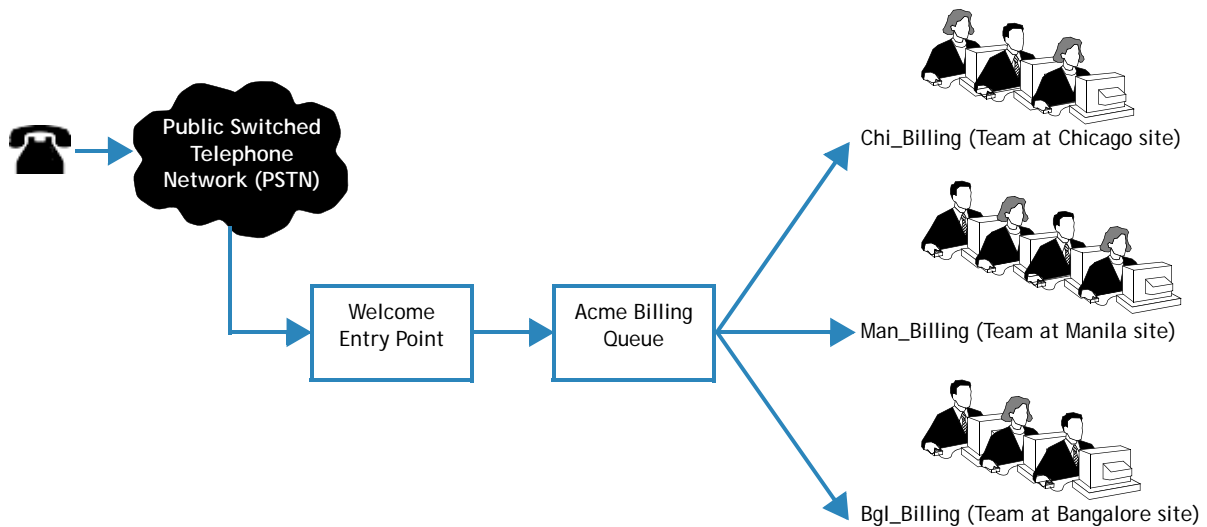
BroadSoft's CC-One offers a unique solution that combines call center and IP technologies in a global call management service. The CC-One solution is built on the BroadSoft® Midpoint Call Management® technology—a centralized control point for managing and monitoring calls across a heterogeneous call center environment.

Offered as a hosted service, CC-One provides enterprises with full control over their global call center queues and creates the appearance of a single, unified call center environment. Calls are distributed to the call center sites while agent capacity is available. After the capacity has been reached, calls are queued centrally to wait for agents to become available.

By queuing calls centrally, enterprises can offload the queuing function from their premises-based equipment, thus achieving substantial cost savings in telecom hardware, toll charges, and bandwidth use. More importantly, a call can be directed to the next available agent at any site. And because the endpoint of the call can be anywhere around the globe, CC-One seamlessly integrates remote agents and at-home agents into the enterprise's multi-source call center environment.

About Sites, Teams, Entry Points, and Queues

A CC-One tenant is an enterprise that has call centers at one or more sites. It also has *entry points* for incoming calls (toll-free numbers) associated with *queues*. For example, an enterprise named *Acme* might have an entry point named *Welcome* that classifies calls into *AcmeBilling* to be distributed to teams in Chicago, Manila, and Bangalore. The call flow for the AcmeBilling queue might look like this:

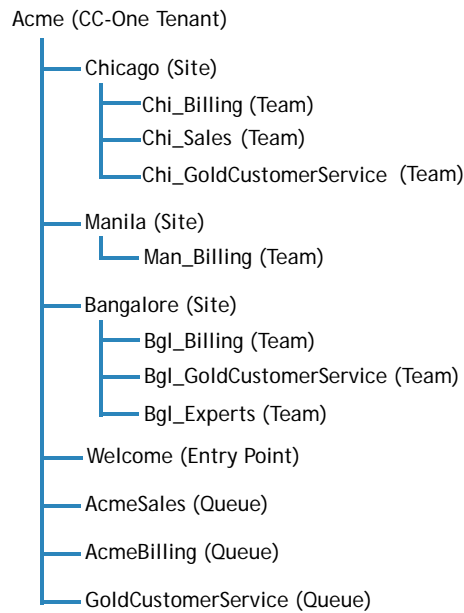


Each CC-One tenant (enterprise) is configured with a profile consisting of sites, teams, entry points, and queues.

- A *site* is a physical call center location under the control of the enterprise. For example, Acme might have sites in Chicago, Manila, and Bangalore.
- A *team* is a group of agents at a specific site who handle a particular type of call. For example, Acme might have teams at their Chicago site named *Chi_Billing*, *Chi_Sales* and *Chi_GoldCustomerService*, and teams at their Bangalore site named *Bgl_Billing*, *Bgl_GoldCustomerService*, and *Bgl_Experts*. Agents can be assigned to more than one team, but an agent can log in to only one team at a time.
- An *entry point* is the initial landing place for customer calls on the CC-One system. One or more toll-free or dial numbers can be associated with an entry point. IVR call treatment is performed while a call is in the entry point.
- A *queue* is where calls are kept while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

Note: Tenants that use the outdial feature are also configured with at least one outdial entry point and outdial queue.

The following diagram illustrates the Acme tenant profile hierarchy.

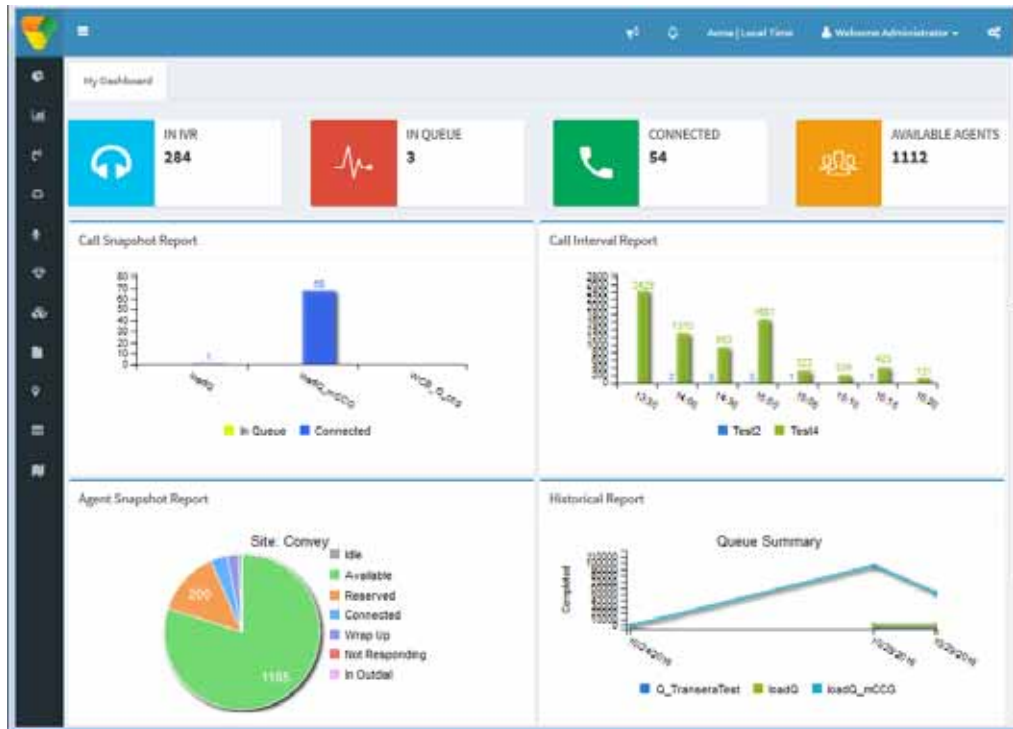


Telecom managers, call center managers, and other representatives of the enterprise who are authorized to access the CC-One service are provided with a view of call center activity at their enterprise through the CC-One Management Portal.

CC-One Management Portal

The CC-One Management Portal is accessed through a Web browser. The Portal provides access to CC-One modules that enable authorized users to view real-time and historical contact center data, silently monitor calls directed to destination sites, create agent accounts and other contact center resources, and control call treatment and distribution by creating and editing scheduled call routing strategies and team capacity strategies.

In addition, the Portal landing page displays graphs of real-time and historical call activity and current agent status.



Access to CC-One modules and functionality is restricted based on the roles assigned to users.

For information about accessing and working with the CC-One Management Portal, see [Chapter 2, “Getting Started,”](#) beginning on [page 25](#).

CC-One Modules

The modules that authorized users can access through the CC-One Management Portal are described in the following table.

Module	Description
Real-Time Reports	Provides real-time visibility into call center activity throughout the enterprise. Using a standard Web browser, call center managers and other authorized users can access call statistics for each site, team, agent, skill, queue, and entry point, and can view current call volume and threshold adherence. For details, see Chapter 4, "Real-Time Reports," beginning on page 147 .
Historical Reports	Provides access to reports that can be viewed online through a Web browser or downloaded to a data analysis tool such as Microsoft Excel. Summary reports provide half-hourly information on call volume and call duration. Detailed reports on agent activity, wrap-up and idle code usage, skills, monitored calls, and threshold alerts are also available. This information allows your enterprise to track busy hours and the average time it takes to handle calls. Authorized users can create their own reports by selecting the data they want included. For details, see Chapter 6, "Historical Reports," beginning on page 273 .
Web Callback Request Report	Enables authorized users to view information about Web callback requests. For details, see "Viewing a Web Callback Request Report" on page 46 .
Call Monitoring	Enables authorized users to silently monitor the quality of service being delivered across their multi-source call centers. The power of the CC-One service lies in the unique ability to monitor any call across any site. Through a simplified Web interface, users can select the queue, team, site, or agent they want to silently monitor. Authorized users can provide instructions to the monitored agent without being heard by the caller, and can join a call being monitored and participate in the conversation. For details, see Chapter 5, "Call Monitoring," beginning on page 207 .
Call Recording	Optional module that enables authorized users to record calls. For details, see Chapter 7, "Call Recording," beginning on page 273 .
Routing Strategy	Provides a Web-based user interface for managing and configuring call-handling strategies. Authorized users can create and schedule global call-routing and team capacity strategies and alter them in real time in response to changes in business dynamics. For details, see Chapter 3, "Contact Routing," beginning on page 49 .
Provisioning	Enables authorized users to view the settings provisioned for the enterprise and to create, edit, and view provisioned resources based on user access privileges. Provides access to Audit Trail, Agent Skill Report, Provisioned Items Report, and Provisioned Skills Report. For details, see Chapter 9, "Provisioning CC-One Resources," beginning on page 289 .
Password Reset	Enables authorized users to reset or reassign passwords for one or more agents at specified sites and on specified teams. For details, see "Resetting Agent Passwords" on page 43 .

Module	Description
Unlock Agent	Enables authorized users to unlock agent accounts that have been locked because the agent entered an incorrect password more than a specified number of times in succession. For details, see “Unlocking Locked Agent Accounts” on page 45 .
Release Notes	Enables authorized users to view and download release notes. For details, see “Accessing Release Notes” on page 41 .
Usage Metrics Report	Enables authorized users to view usage metrics for up to 13 months. For details, see “Viewing Usage Metrics” on page 42 .
Jukebox	Optional module that enables authorized users to search for and play calls recorded through the CC-One Call Recording feature. For details, see Chapter 8, “Jukebox,” beginning on page 277 .
Seatmap	Optional module that provides contact center supervisors with real-time visibility into agent activity. Users with Seatmap editing privileges can map groups of agents into views for monitoring. For details, see Chapter 11, “Seatmap,” beginning on page 407 .

About Time Zones

All dates and times displayed on the CC-One Management Portal and in the CC-One modules reflect the time zone provisioned for the enterprise (typically headquarters) with the following exceptions:

- Dates and times displayed on the main pages of the Real-Time Reports and Call Monitoring modules reflect *browser* time.
- Time values in routing strategies are based on the time zone provisioned for the entry point or queue or, if no time zone is specified, the time zone provisioned for the enterprise.

Dates are converted to UTC time when they are saved to the database, so system behavior such as time-of-day routing is applied universally across the multi-site call center network, regardless of which time zones the sites are located in. Historical reports are filtered based on the enterprise time zone.

To specify a different time zone for displaying the time values in routing strategies, see [“Understanding Time Values in Routing Strategies” on page 88](#).

Management Portal Navigation

Topics covered in this section:

- [Navigating from the Management Portal Landing Page](#)
- [Historical Reports Navigation](#)
- [Real-Time Reports Navigation](#)

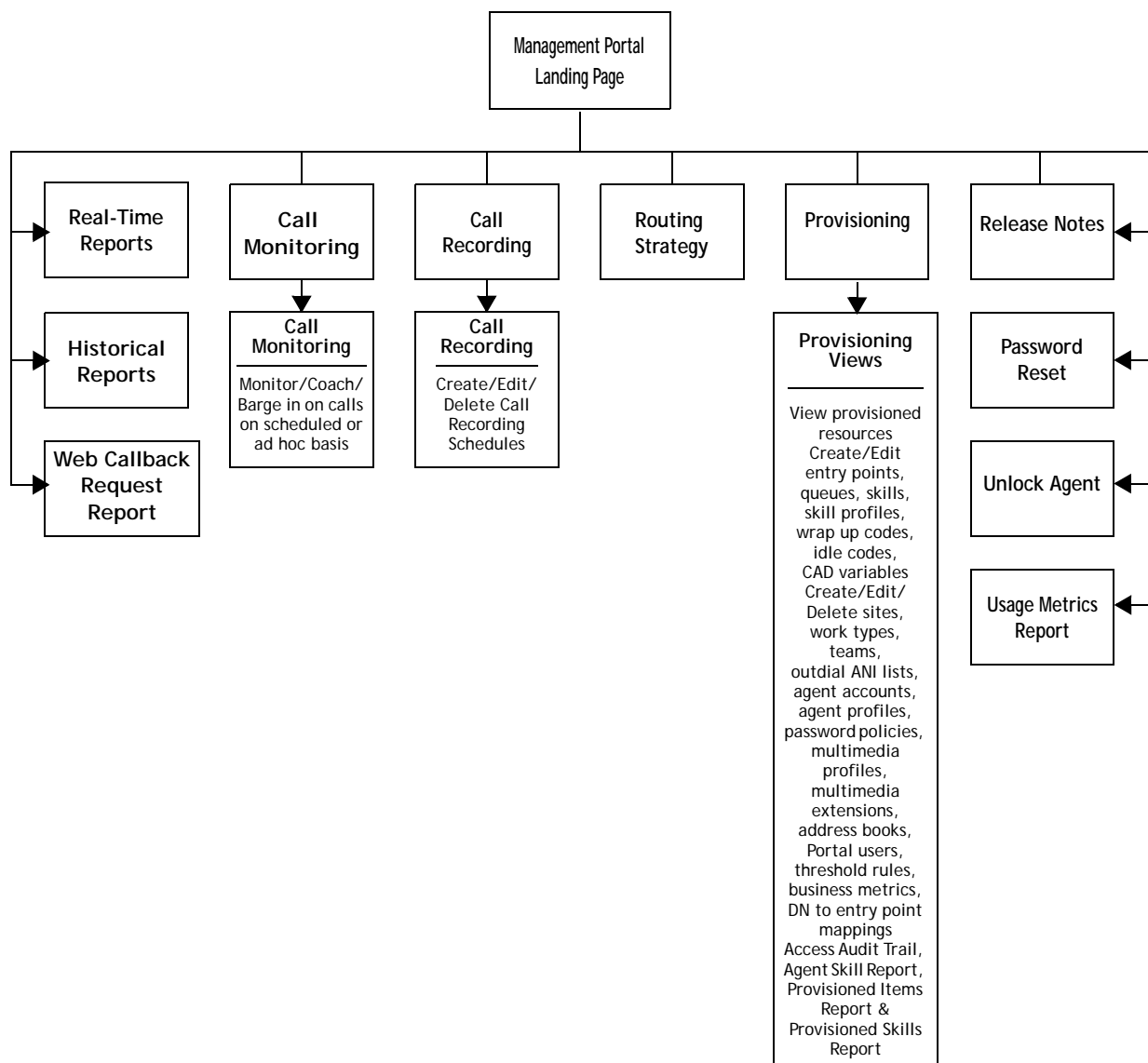
Navigating from the Management Portal Landing Page

The CC-One Management Portal landing page displays links to the CC-One modules. Note that only the modules that you have permission to access are active. The Historical Reports and Real-Time Reports modules provide the ability to drill down to access more detailed information; see:

- [“Real-Time Reports Navigation”](#) on page 21
- [“Historical Reports Navigation”](#) on page 22

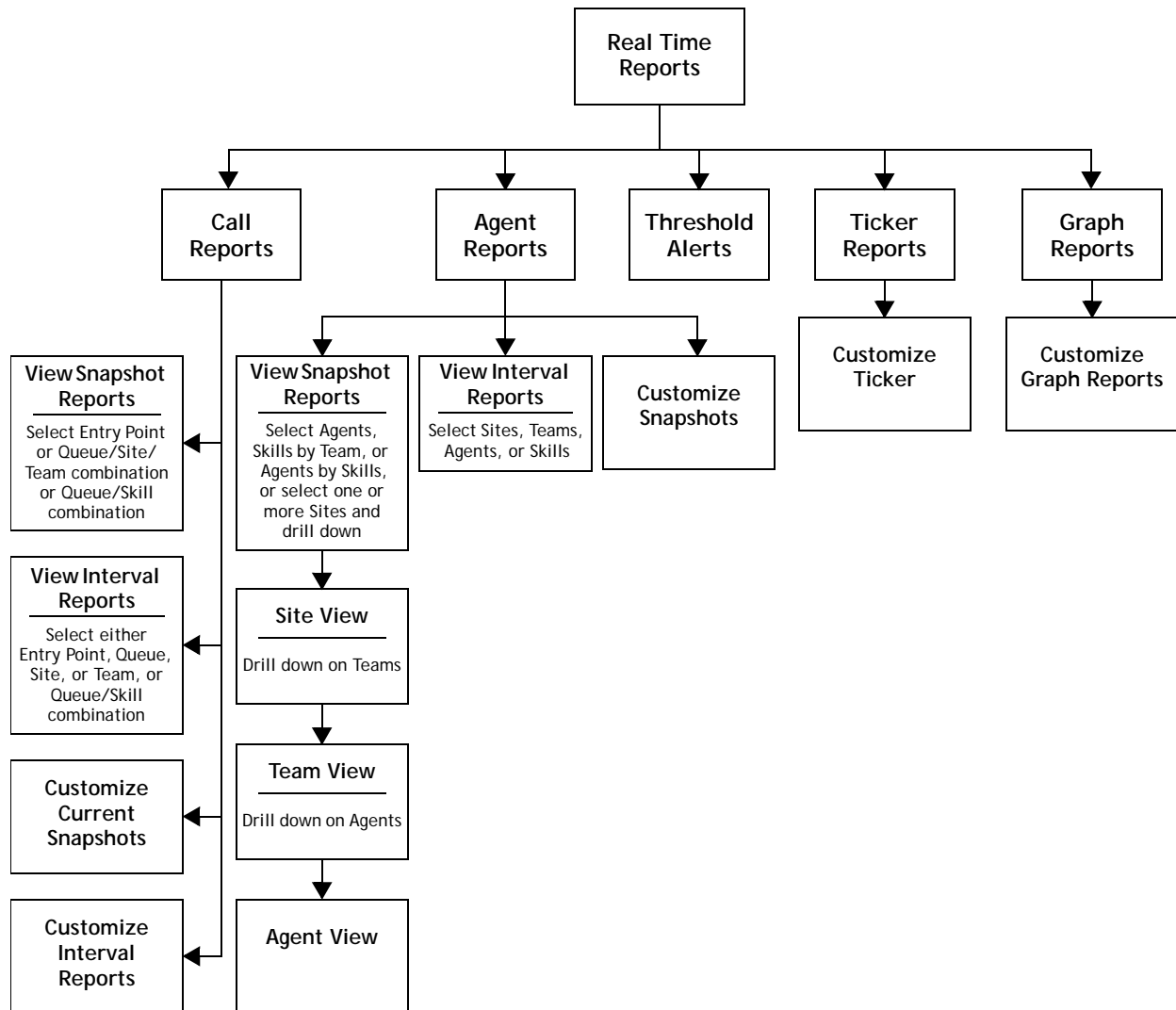
See also:

- [“Routing Strategy Navigation”](#) on page 23



Real-Time Reports Navigation

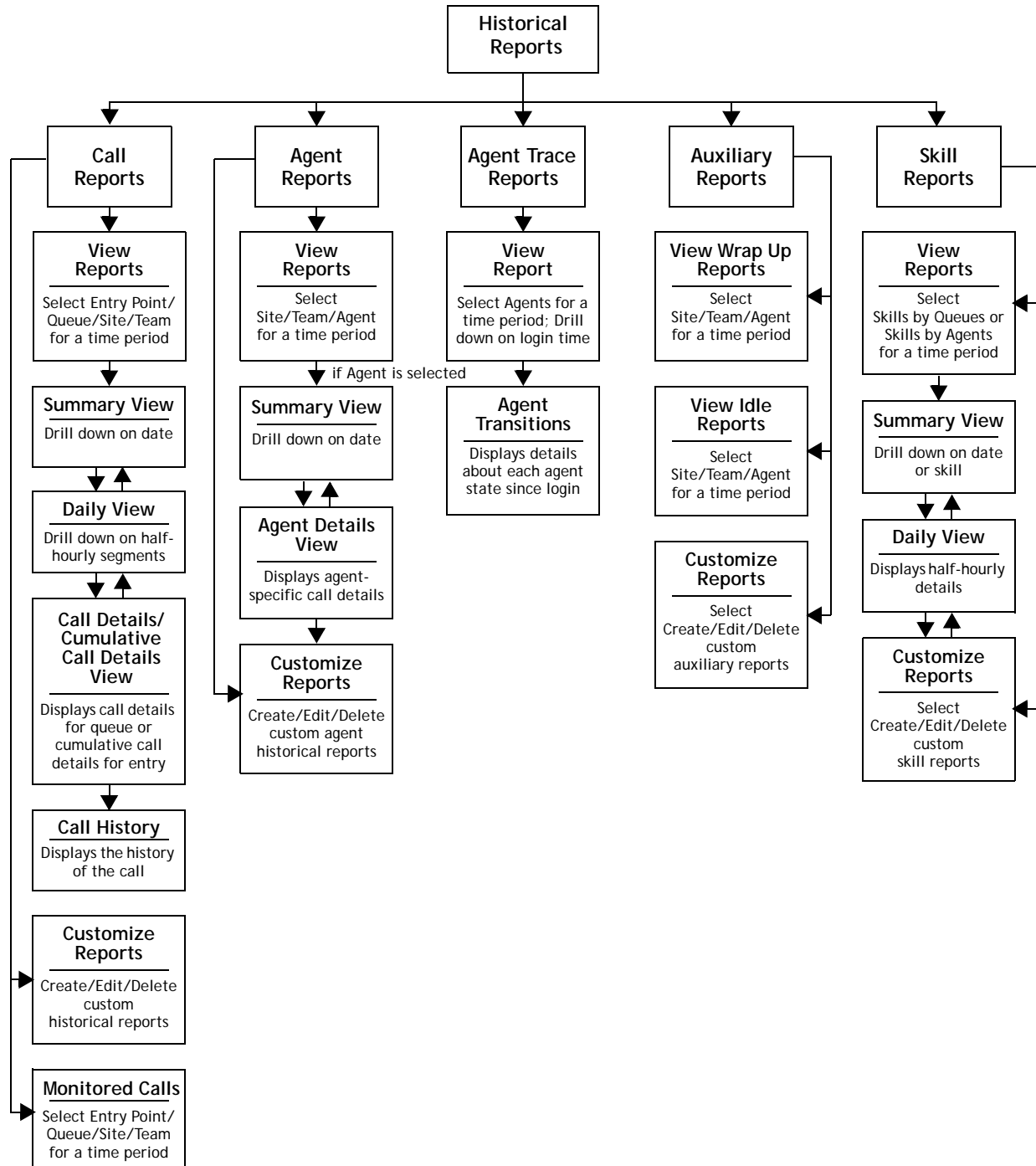
You can navigate the Real-Time Reports module as illustrated below. Skill reports are available only to enterprises provisioned with the optional skills-based routing feature and threshold alerts are available only to enterprises provisioned with the Threshold Alerts feature.



Historical Reports Navigation

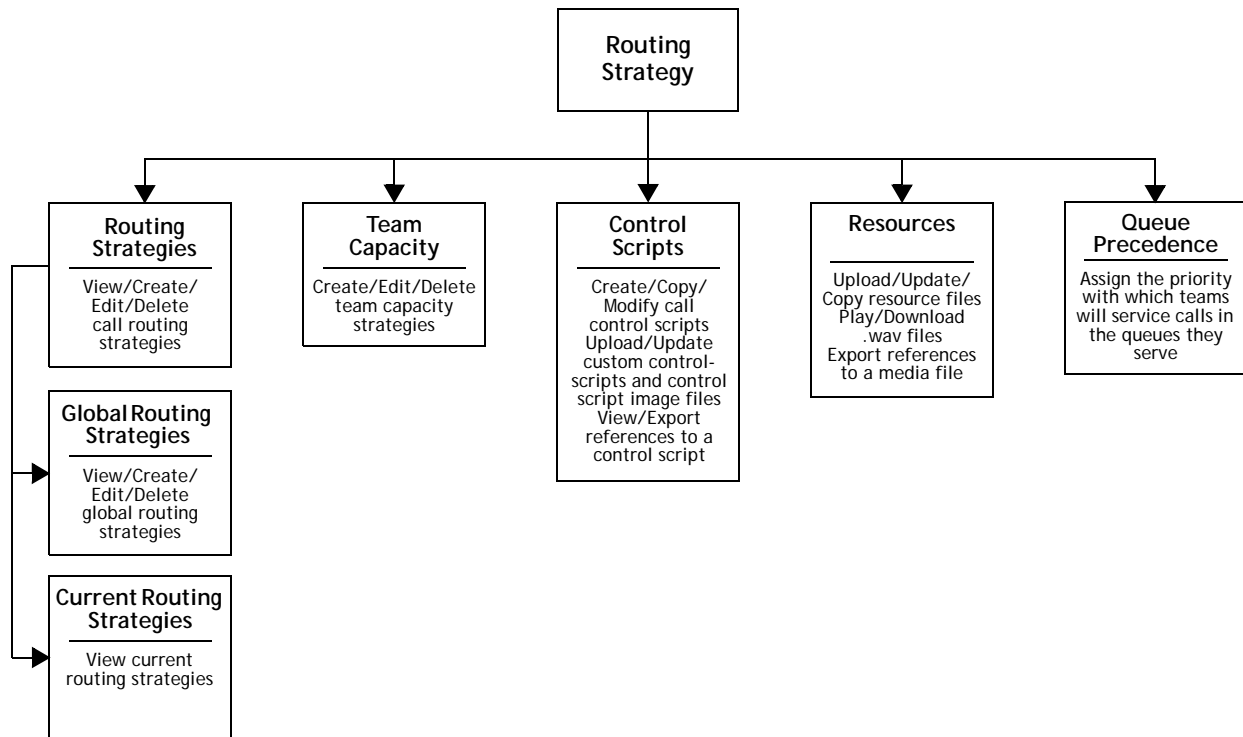
You can navigate the Historical Reports module as illustrated below. Skill reports are available only to enterprises provisioned with the optional skills-based routing feature.

In addition to the reports shown below, Threshold Alerts reports are also available to authorized users at enterprises that use the threshold alerts feature.



Routing Strategy Navigation

You can navigate the Routing Strategy module as illustrated below.



... 2 Getting Started

This chapter explains how to access the CC-One functionality, perform basic operations, and get Help while you work.

Topics covered in this chapter:

- [CC-One Management Portal Prerequisites](#)
- [Signing In to the CC-One Management Portal](#)
- [Working with the CC-One Management Portal](#)
- [Accessing CC-One Modules](#)
- [Responding to Supervisory Alerts from Agents](#)
- [Displaying Broadcast Messages](#)
- [Changing Your Password](#)
- [Changing the Colors on Your Management Portal Pages](#)
- [Creating a Custom Theme](#)
- [Getting Help](#)
- [Accessing Release Notes](#)
- [Viewing Usage Metrics](#)
- [Resetting Agent Passwords](#)
- [Unlocking Locked Agent Accounts](#)
- [Viewing a Web Callback Request Report](#)

CC-One Management Portal Prerequisites

The CC-One Management Portal requirements are described in the following sections:

- [Browser Requirements](#)
- [Adobe Flash Player](#)

Browser Requirements

The CC-One Management Portal requires Internet Explorer 10 or higher, or Mozilla Firefox 38 or higher, or Google Chrome 44 or higher, set up as follows:

- Browser cache cleared before starting the current release for the first time
- Cookies set to Enabled
- Security level set to Medium
- Show Pictures option selected
- Pop-up blocker disabled
- Javascript enabled

Note: For better performance, recommended browser is Mozilla Firefox or Google Chrome.

Adobe Flash Player

The Management Portal requires Adobe Flash Player 18 or later. If the player is not installed on your system, you will be prompted to download it from the Adobe site when you attempt to log in for the first time. BroadSoft recommends running the latest version of Flash Player. Go to the following Adobe Web site for more information and to find out whether Flash Player is installed on your system and, if so, what version is installed:

<http://www.adobe.com/software/flash/about/>

Signing In to the CC-One Management Portal

You sign in to the CC-One Management Portal through an Internet Explorer or Firefox browser, using sign-in information provided to you by your CC-One service provider. Your access to modules and functionality is determined by permissions assigned by your site administrator.

To sign in to the CC-One Management Portal:

1. Open a Web browser and navigate to the URL provided by BroadSoft.
2. Enter your login name, password, and enterprise name. Note that the password is case sensitive.

Click this link if you cannot remember your password.



If you cannot remember your password, click **Forgot Password?** Then, in the settings that appear, enter your login name, email address, and enterprise name, and click **Submit**. If your enterprise uses the password reset feature and the information you entered is valid, a new password will be sent to your email address.

If you are signing in with a new or reset password, you might be prompted to change your password. After doing so, you must enter a password again on the sign-in page.

3. Click **Sign In**.

The Management Portal landing page appears. For more information about the landing page, see [“Working with the CC-One Management Portal” on page 28](#).

Note: After you sign out, close all CC-One windows before signing in again.

Working with the CC-One Management Portal

The Portal landing page displays a services panel on the left that you can expand or collapse by clicking the ☰ button on the upper-left side of the page.









You can drag the title bar of a chart to move it to a different position as shown in the next illustration.

Drag the title bar of a chart to move it to a different position.



The components of the Management Portal landing page are described in the following table.

Component	Description
Services panel	<p>Displays links to the modules that you are authorized to access (see the next section, “Accessing CC-One Modules”).</p> <p>Each link displays either the name of a module or, if the panel is collapsed, an icon that represents the module. Point to an icon to display the module name.</p> <p>To expand or collapse the panel, click the  button on the upper-left side of the landing page.</p>

Component	Description
Reports panel	<p>Widgets at the top of the panel display counts of the number of calls currently in IVR, in queue, and connected, and the number of currently available agents.</p> <p>The rest of this panel displays three charts that provide real-time statistics for current call activity, interval call activity, and site-level agent activity, and a fourth chart that provides historical statistics.</p> <p>These charts are from the default reports specified in the Real-Time Reports and Historical Reports modules. You can change what is displayed in these charts by specifying different default reports from within these modules.</p> <p>You can click a chart to display the corresponding report in the Real-Time Reports or Historical Reports module window.</p> <p>To change the size of a chart, point to a corner or edge and when the mouse pointer changes to a two-headed arrow, drag the corner or edge to shrink or enlarge the chart.</p> <p>To restore the original size of resized charts, click the  Welcome <i>LoginName</i> button on the upper-right side of the page and select Reset Widgets.</p>
Messages  button	Displays system messages (see “Displaying Broadcast Messages” on page 34 for more information).
Alerts  button	Visible only if your enterprise subscribes to the Supervisory Alerts feature (see “Responding to Supervisory Alerts from Agents” on page 32).
Settings  button	<p>Expands and collapses a two- or three-tabbed panel where you can do the following:</p> <ul style="list-style-type: none"> • Select a different user interface skin (see “Changing the Colors on Your Management Portal Pages” on page 35). • Customize the user interface banner color and images used on the Management Portal pages. The tab displaying these settings appears only if authorized by your user role (see “Creating a Custom Theme” on page 36). • Change your password (see “Changing Your Password” on page 34). • Change the time zone in which the time values in routing strategies are displayed (see “Understanding Time Values in Routing Strategies” on page 88).
 Welcome <i>LoginName</i> button	<p>Displays three options in a drop-down list:</p> <ul style="list-style-type: none"> • Help: Opens a Help window (see “Getting Help” on page 37). • Reset Widgets: Restores the original size and position of the charts on the page after you resize or reposition them. • Logout: Logs you out of the Management Portal after closing all open modules.

Accessing CC-One Modules

To access a CC-One module:

- After signing in to the Management Portal, click the link in the Services panel that represents the appropriate module.

If the Services panel is collapsed, you can click the ☰ button on the upper-left side of the Portal landing page to expand it (see the illustration on [page 28](#)).


Each module is briefly described in the following table. If a module name is not present, either you do not have permission to access the module, or it is an optional module that was not licensed by your enterprise.

Access this module	To do this
Real-Time Reports	View real-time statistics and key performance indicators across all call center sites, teams, and agents. For details, see “Real-Time Reports” beginning on page 147 .
Historical Reports	View saved historical reports, create new reports, and adjust report parameters. For details, see “Historical Reports” beginning on page 221 .
Web Callback Request Report	View information about Web callback requests. For details, see “Viewing a Web Callback Request Report” on page 46 .
Call Monitoring	Silently monitor calls at any site for any team or agent, provide instructions to the monitored agent without being heard by the caller, and join a call being monitored and participate in the conversation. For details, see “Call Monitoring” beginning on page 207 .
Call Recording	Record calls at any site for any team or agent. For details, see “Call Recording” beginning on page 273 .
Routing Strategy	Create scheduled routing strategies and team capacity strategies and make real-time adjustments to call center traffic flow. For details, see “Contact Routing” beginning on page 49 .
Provisioning	View settings provisioned for your enterprise. Create and edit Management Portal users, queues, entry points, DN to entry point mappings, sites, skills and skill profiles, multimedia profiles, threshold rules, teams, idle and wrap-up codes and work types to associate them with, address books, password policies, agent profiles, business metrics, and call-associated data variables for use in call control scripts. Add agents to the system and assign them to teams, and delete, activate, and unlock agent accounts. Access Audit Trail and Provisioned Items reports. For details, see “Provisioning CC-One Resources” beginning on page 289 .
Password Reset	Reset or reassign passwords for one or more agents at specified sites and on specified teams. For details, see “Resetting Agent Passwords” on page 43 .


Access this module	To do this
Unlock Agent	Unlock locked agent accounts at specified sites and on specified teams. For details, see “Unlocking Locked Agent Accounts” on page 45
Release Notes	View and download release notes. For details, see “Accessing Release Notes” on page 41 .
Usage Metrics Report	View usage metrics for up to 13 months. For details, see “Viewing Usage Metrics” on page 42 .
Jukebox	Search for and play calls recorded through the CC-One Call Recording feature. For details, see “Jukebox” beginning on page 277 .
Seatmap	Map agents into groups to create views for monitoring, or monitor previously created Seatmap views, depending on your user access privileges. Once agents have been mapped to Seatmap views, the system provides real-time statistics for each agent in the selected view as well as enterprise-wide key performance indicators and alerts. For details, see Chapter 11, “Seatmap,” beginning on page 407 .

Responding to Supervisory Alerts from Agents

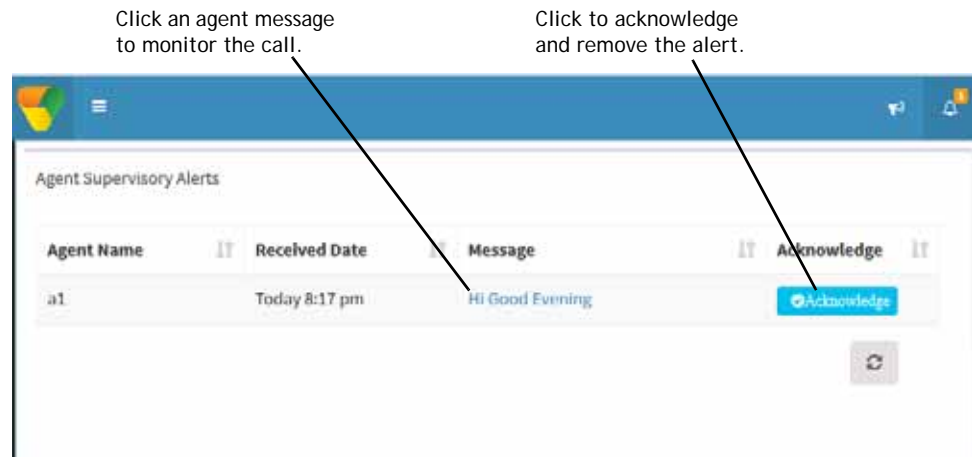
If your enterprise subscribes to the Supervisory Alerts feature, an agent can send a midcall monitor request during a call to all logged-in supervisors whose user accounts include access to the queue, site, and team of the requesting agent, and whose user roles permit midcall monitoring and access to the supervisory alert feature. In addition, Permit Monitoring must be enabled for the queue.


When an alert arrives on the Portal landing page, the Alerts  button displays a count of the number of unacknowledged alerts associated with calls that have not ended. When an alert is either acknowledged or the call associated with the alert ends, the count is decreased.

To respond to a supervisory alert:

1. Click the Alerts  button at the top of the Portal landing page to open the Agent Supervisory Alerts window.


The window displays unacknowledged alerts grouped by agent name.

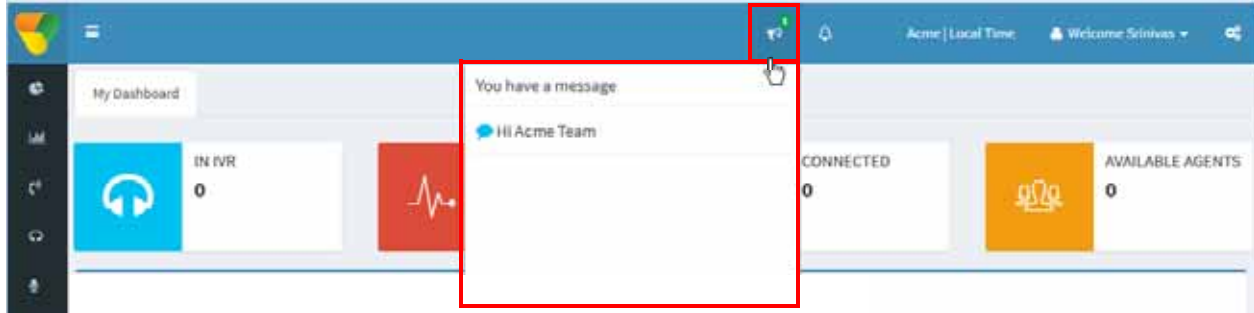


2. To monitor the call:
 - a. Click the agent message to open the Call Monitoring module populated with the agent data required to monitor that agent.
 - b. Enter your callback number and click the **Midcall Monitor** button.
3. To remove the message from the Agent Supervisory Alerts window and from other CC-One Management Portal landing pages and update the database:
 - a. In the **Agent Supervisory Alerts** window, click an **Acknowledge** button to the right of the alert message.
 - b. In the dialog box acknowledging the request, click **OK**. Then, In the dialog box acknowledging successful deletion of the alert, click **OK**.
4. To update the data in the open Agent Supervisory Alerts window more often than every 30 seconds, click the Reload  button on the lower right side of the window.

Displaying Broadcast Messages



CC-One broadcast messages are occasionally displayed on the CC-One Portal landing page. Typically, such messages inform users of scheduled system unavailability due to system maintenance.

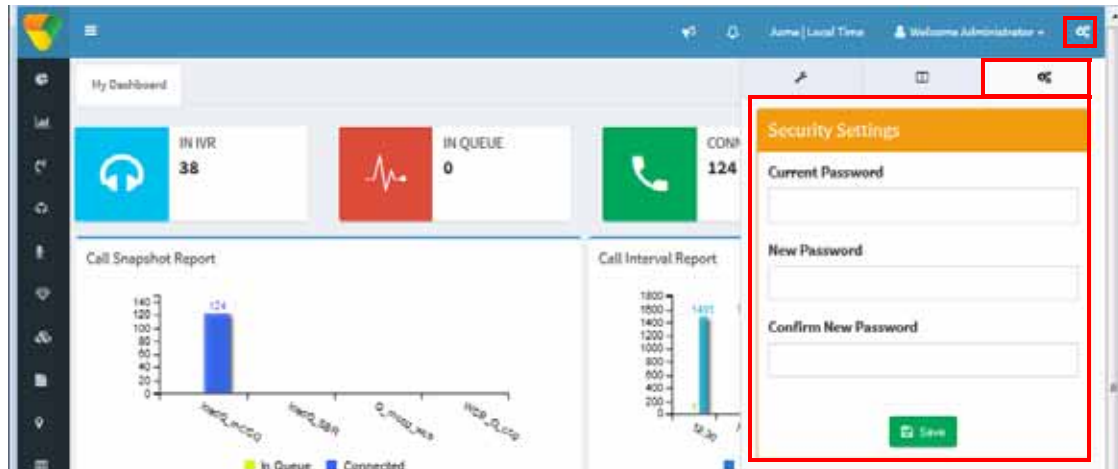
When a broadcast message arrives, the Message  button displays a count of the number of messages that have not expired. To view messages, click the button to open the message window. Click the button again to close the window.



Changing Your Password



To change your password:

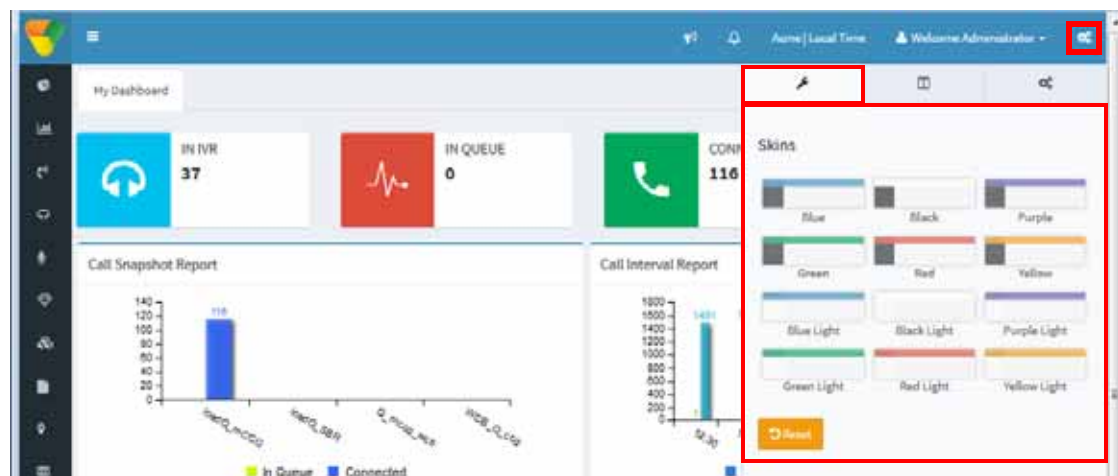
1. Click the gears  icon in the upper-right corner of the Portal landing page to display the settings panel.
2. Click the tab displaying the gears  icon, and under **Security Settings**:
 - a. Type your current password in the **Current Password** box.
 - b. Type your new password in the **New Password** and **Confirm New Password** boxes and then click **Save**. Note that passwords are case sensitive.



Changing the Colors on Your Management Portal Pages

You can change the set of colors in the selection panel and in the banner on Portal pages by selecting a different skin:




1. Click the gears  icon in the upper-right corner of the Portal landing page to display the settings panel.
2. Click the tab displaying the wrench  icon, and select a skin. The colors are changed immediately.
3. To restore the default color set, click the **Reset** button.

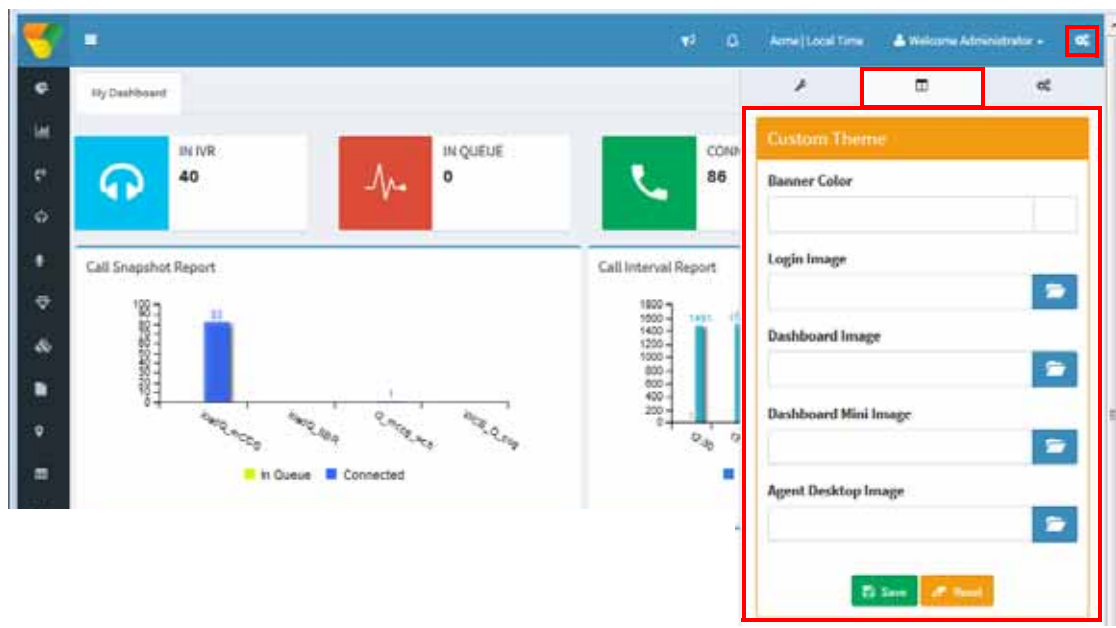


Creating a Custom Theme

Authorized users can customize the banner color and images used on Management Portal pages by creating a custom theme.

To create a custom theme:

1. Click the gears  icon on the upper-right side of the Portal landing page to display the settings panel.
2. Click the tab displaying the  icon to display the **Custom Theme** settings.
3. Under **Banner Color**, either type the HTML (hexadecimal) code for a color or click inside the small box on the right and select a color from the color selector.
4. Click the folder  button for each listed image type and in the dialog box that opens, navigate to the image file in your system that you want to use and click **Open**. Supported file formats are PNG, JPG, JPEG, and GIF.
5. Click **Save** to save your settings.



Getting Help

Topics covered in this section:

- [Displaying Online Help](#)
- [Navigating the Help System](#)
- [Searching the Help System](#)
- [Resizing the Navigation Frame](#)
- [Printing a Help Topic](#)

See also “[Accessing Release Notes](#)” on page 41.


Displaying Online Help

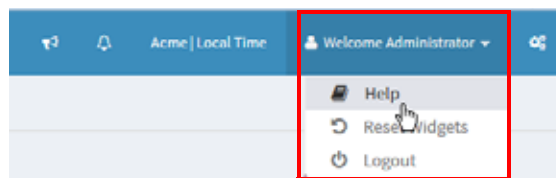
After you sign in to the CC-One service, you can access online Help at any time.

To display online Help:

- Click the **Help** link on the upper right side of a module page.


-OR-

- On the Management Portal landing page, click the  button on the on the upper-right side of the page and select **Help**. (If your browser window is wide enough the button also displays your login name.)

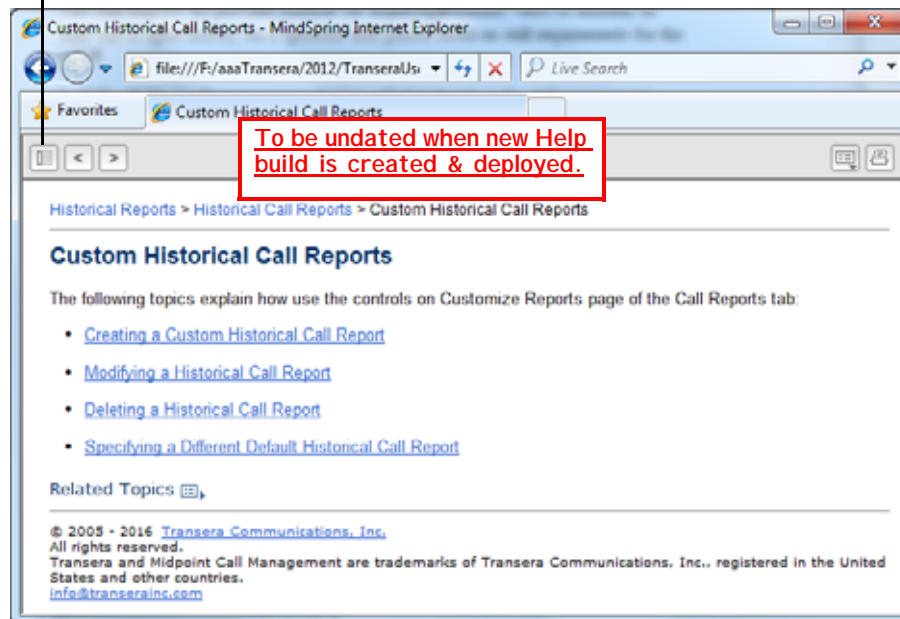


A topic relating to the current CC-One page is displayed.

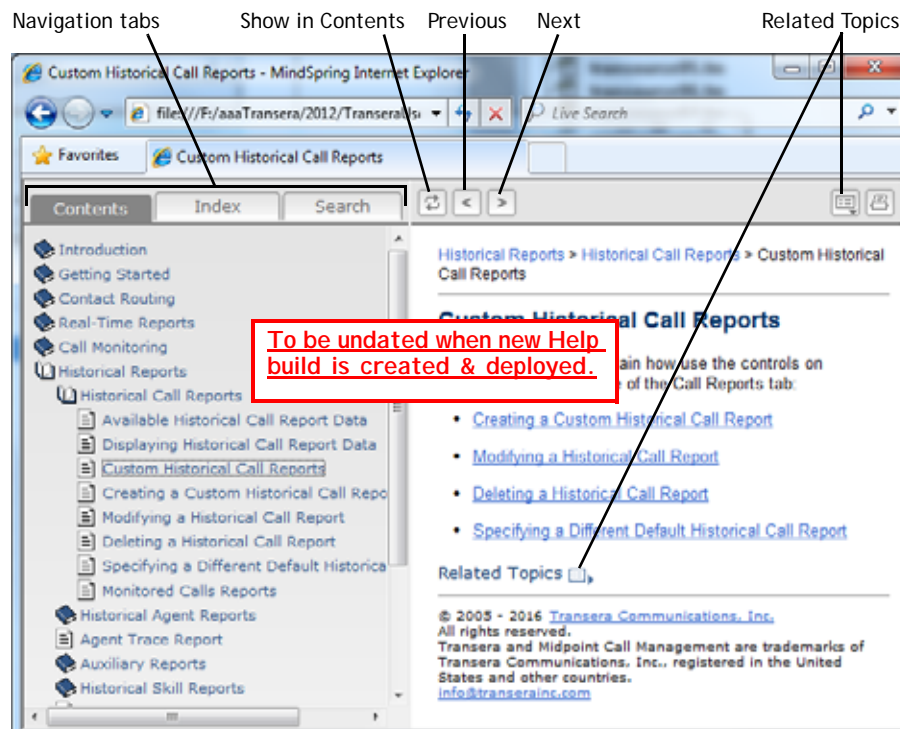
Navigating the Help System

When you access Help from a CC-One module, Help is displayed without navigation tabs. Click the **Show Navigation**  button to display the tabs.

Click this button to display the Help navigation tabs.



Following is an illustration of a Help window with the navigation tabs displayed.




The following table describes the navigation controls in the Help window.

Control	Description
Show in Contents button	Locates and highlights the entry in the Contents tab that corresponds to the currently displayed topic. Brings the Contents tab to the front if it is not already the foremost tab.
Previous button	Displays the topic that precedes the currently displayed topic in the Help system. To display the last topic viewed, click the Back button on the browser toolbar.
Next button	Displays the next topic in the Help system.
Related Topics button	Opens a list of topics related to the currently displayed topic. Click a link in the list to display that topic.
Navigation tabs	Provides core navigation: <ul style="list-style-type: none"> • The Contents tab displays the hierarchy of topics in a collapsible and expandable tree view. Click a closed book icon to see a list of subtopics. Click an open book icon to collapse the list. Click the text next to a book or page icon to display the associated Help topic. • The Index tab displays index entries. You can scroll the list to find the entry you want. Click an index entry to display the corresponding topic. If more than one topic corresponds to the entry, a list of the topics is displayed in the topic frame. • The Search tab provides a search function. For more information, see “Searching the Help System” on page 39.

Searching the Help System

When you search for multiple words, the search finds Help topics containing all the words you entered.

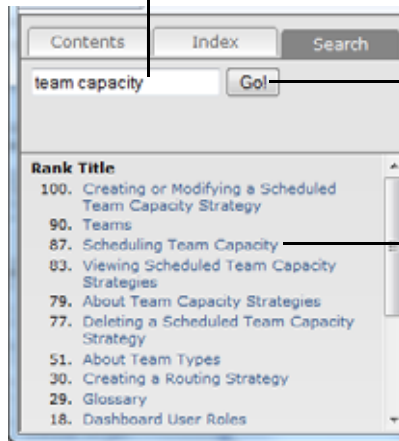
To search the Help system:

1. If the navigation tabs are not already displayed, click the **Show Navigation**  button on the Help window toolbar.
2. Click the **Search** tab.
3. Type the word or phrase you want to search for in the text box, and then press ENTER or click **Go**.

A list of all Help topics containing the word or phrase you entered is displayed. The topics are ranked in order of relevance.

- 4. Click a topic in the list to display it.

Type your search word or phrase here...



... then click Go.

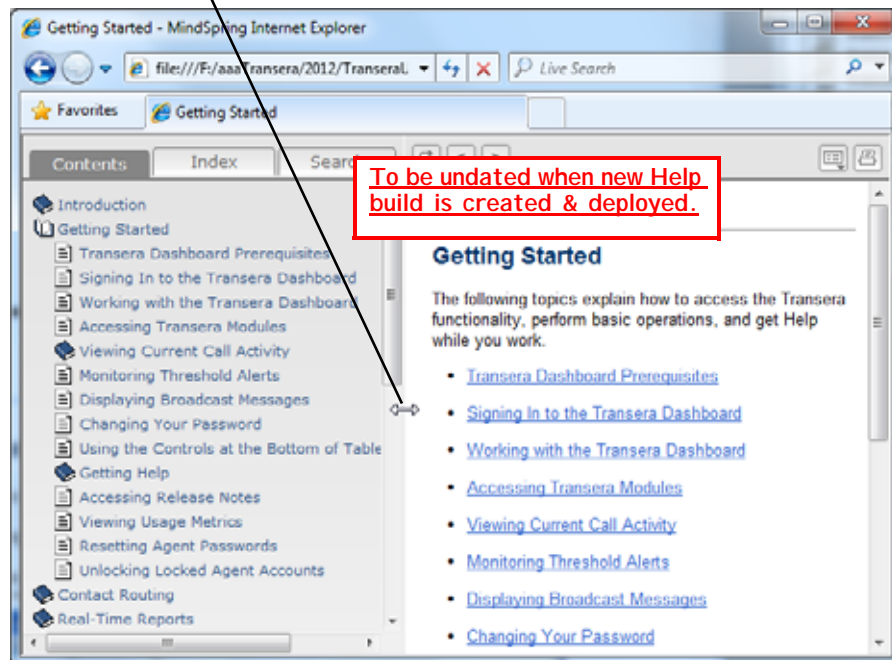
The found topics are ranked in order of relevance. Click a topic title to display the associated topic.

Resizing the Navigation Frame

To resize the navigation frame:


- Drag the vertical line between the navigation frame and the topic frame.

Drag to the right or left to resize the navigation frame.

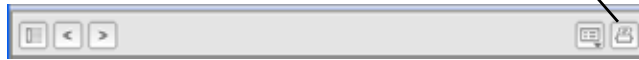


Printing a Help Topic

To print a Help topic:

1. Display the Help topic you want to print.
2. Click the **Print**  button on the Help window toolbar.

Click this button to print the topic.



3. Select the appropriate print options in the dialog box that opens.

Accessing Release Notes

The Release Notes module displays links that provide authorized users with access to documents describing recent enhancements, bug fixes, and open issues relevant to their CC-One service.

To access release notes:

1. Click the **Release Notes** link on the Portal landing page.

The Release Notes page appears, displaying the names of available files.

2. To search for a specific file name, enter one or more characters in the **Search** box on the upper-right side of the Release Notes page to display only those file names that include the character sequence you entered.
3. Click the name of the file you are interested in, and in the dialog box that opens, do one of the following:
 - To open the file, click **Open**.
 - OR -
 - To download the file, click **Save**. In the dialog box that opens, navigate to the directory where you want to save the file, and then click **Save**.

Viewing Usage Metrics

If your enterprise is provisioned with the Usage Metrics Report module, authorized users can view CC-One Service usage metrics for up to 13 months.

To view usage metrics:

1. Click the **Usage Metrics Report** link on the Portal landing page.
2. On the Usage Metrics Report page that appears, select a month and year from the **From** and **To** drop-down lists in the Report Filter panel, and then click **Apply**.

The usage metrics for the months you selected are displayed. Each metric is described in the following table.

Month	Total Calls	Calls Duration (min)	Inbound			
			Total Calls	Connected Calls	IVR Duration (min)	Queue Duration (min)
Total	3,555,435	16,141,058	3,510,741	2,722,273	696,028	6,356,000
Jun-2016	798,333	3,854,182	798,333	753,018	240,172	1,060,001
Jul-2016	1,951,414	9,581,108	1,926,367	1,355,577	412,558	4,778,881
Aug-2016	247,064	1,082,673	227,502	226,991	35,332	24,952
Sep-2016	110,111	233,801	110,097	3,970	3	205,441
Oct-2016	448,513	1,397,291	448,442	382,717	7,961	281,701

Column	Description
Month	The month during which the call activity occurred.
Total Calls	The total number of inbound and outdial calls.
Calls Duration (min)	The total amount of time between when inbound calls arrived or outdial calls were placed and when they were terminated.

Column	Description
Inbound	<p>Total Calls. The total number of inbound calls.</p> <p>Connected Calls. The number of inbound calls that were connected to an agent.</p> <p>IVR Duration (min). The number of minutes during which calls were in the IVR system.</p> <p>Queue Duration (sec). The number of seconds during which calls were in a queue.</p> <p>Talk Time (min). The number of minutes during which agents were talking with callers.</p> <p>Hold Time (min). The number of minutes during which inbound calls were on hold.</p>
Outdial	<p>Total Calls. The total number of outdial calls.</p> <p>Connected Calls. The number of outdial calls that were connected to an agent.</p> <p>Talk Time (min). The number of minutes during which an agent was talking with a party on an outdial call.</p> <p>Hold Time (min). The number of minutes during which outdial calls were on hold.</p>
Recorded Calls	The number of calls that were recorded.

- For information about the controls at the bottom of the page, see [“Using the Controls at the Bottom of a Grid”](#) on page 150.

Resetting Agent Passwords

If you have access to the Password Reset module, you can easily reset or reassign the passwords of one or multiple agents at the sites and on the teams to which you have access privileges.

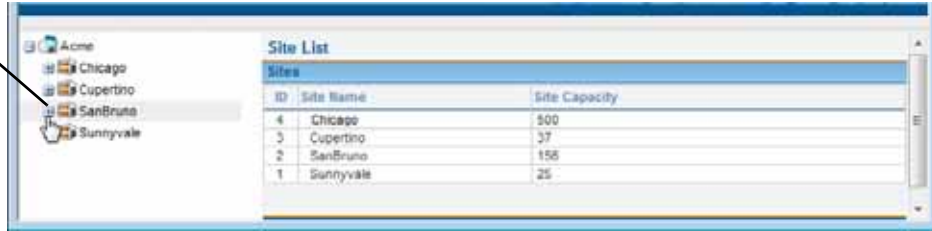
To change the password of one or more agents:

- Click the **Password Reset** link on the Portal landing page.

The Site List page opens, displaying a list of the sites to which you have access.

- In the selection panel on the left side of the page, click the plus sign (+) next to a listed site to display a list of teams at that site to which you have access.

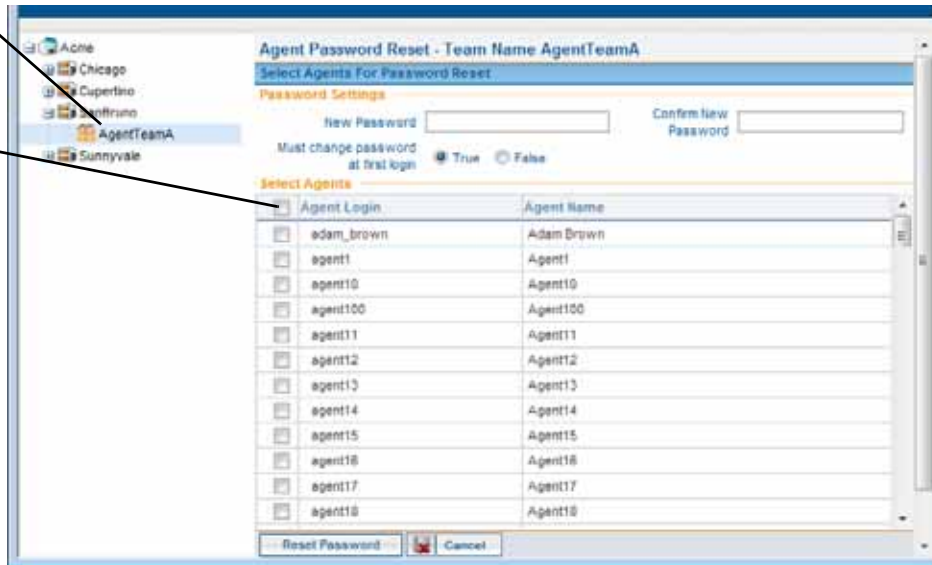
Click the plus sign (+) next to a listed site.



3. Click the name of a team to display the Password Reset page for that team.

Select the name of a team to display the Agent Password Reset page.

Click this check box to select all listed agents.



4. Select the check box to the left of each listed agent whose password you want to change and specify password settings as described in the following table.

Setting	Description
Password	Enter a password for the agent or click the Set to Default button to specify the default password that is defined for your enterprise. Minimum and maximum length and allowable characters are based on the password policy specified in the agent profile assigned to the agent.
Confirm Password	Re-enter the agent's password.
Must change password at login	Select True or False to specify whether or not the user will be required to create a new password when logging in with this password for the first time.

5. Click **Reset Password** at the bottom of the page and then, in the confirmation dialog box, click **OK** to save your settings.

Unlocking Locked Agent Accounts

The system automatically locks an agent account if the agent enters an incorrect password more than a specified number of times in succession, thus preventing future attempts to log in. The maximum number of allowable invalid login attempts is determined by the password policy assigned to the agent.

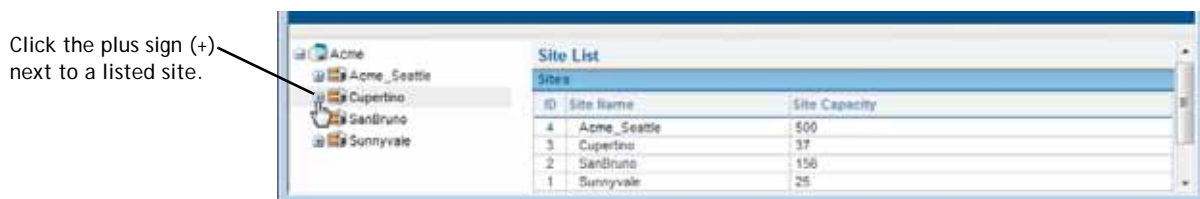
If you have access to the Unlock Agents module, you can easily unlock one or more locked agent accounts at the sites and on the teams to which you have access privileges.

To unlock the account of one or more agents:

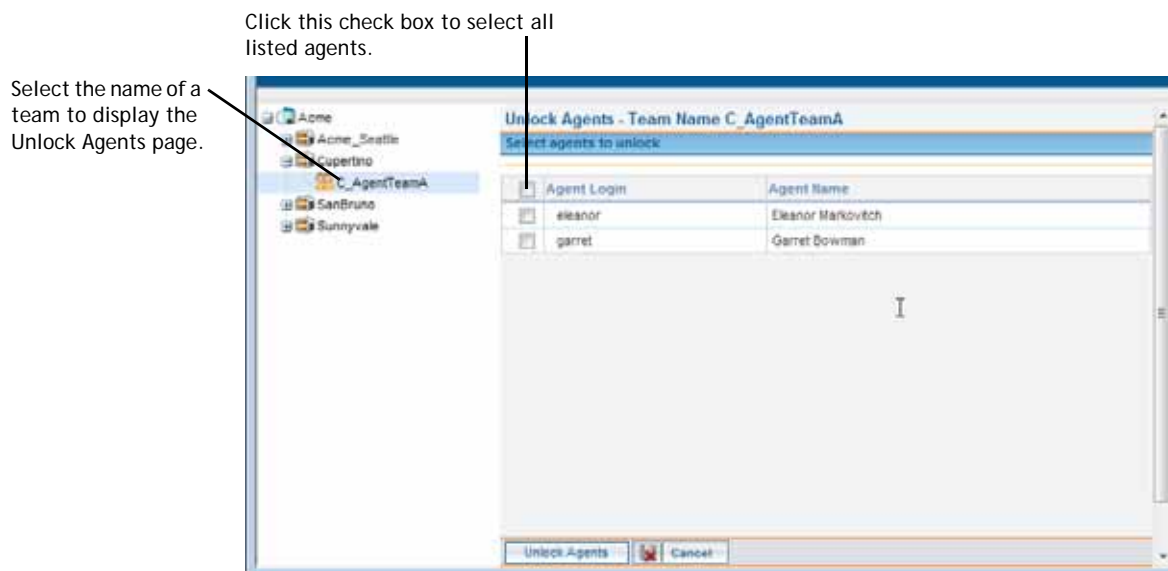
1. Click the **Unlock Agent** link on the Portal landing page.

The Site List page opens, displaying a list of the sites to which you have access.

2. In the selection panel on the left side of the page, click the plus sign (+) next to a listed site to display a list of teams at that site to which you have access.



3. Click the name of a team to display a list of all locked agents on that team.



4. Select the check box to the left of each listed agent whose account you want to unlock, or select the check box at the top of the column to select all listed agents.

5. Click **Unlock Agents** at the bottom of the page.

A confirmation dialog box displays the number of agents you selected and informs you that they will be required to change their passwords on first login.

6. In the confirmation dialog box, click **OK**.

Viewing a Web Callback Request Report

If your enterprise uses the optional Web Callback feature (described in “[About Web Callback](#)” on page 60), authorized users can view the Web Callback Request Report. This report displays details about Web callback requests and, if your enterprise uses the Voice Callback feature, about voice callback requests.

To access the report:

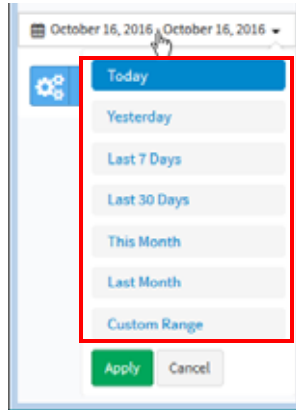
1. Click the **Web Callback Request Report** link on the Portal landing page.

The Web Callback Request Report page appears.

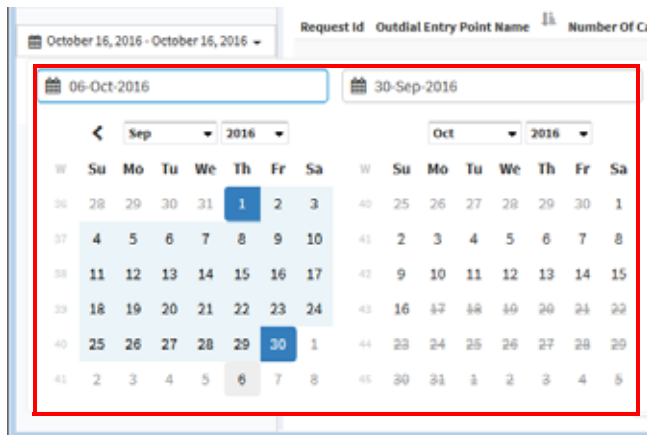
2. In the **Report Filter** panel on the left side of the page, select the outdial entry points you want to include in the report.
3. From the **Call Status** drop-down list, select one of the call status values described in the following table or select **All** to include all call status values in the report.

Call Status	Description
Scheduled	The requested callback has been scheduled.
Processed	The requested callback was successfully connected to the requester.
Failed	An outbound call was made to the requester’s phone number, but was not successfully connected to the requester. For example, this would be the case if the requester did not answer the call, or the call was answered by a recorded message or a busy signal. A failed callback is optionally rescheduled based on the maximum callback attempts allowed and the retry attempt interval provisioned for your enterprise
Cancelled	The requested callback was made, but was rejected by the requester.
Tam Post Failed	The CC-One Callback Manager was unable to post the callback request to the CC-One Interaction Router (internally referred to as TAM). For example, this would be the case if the Router was down.

4. Click inside the field displaying a date range and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.

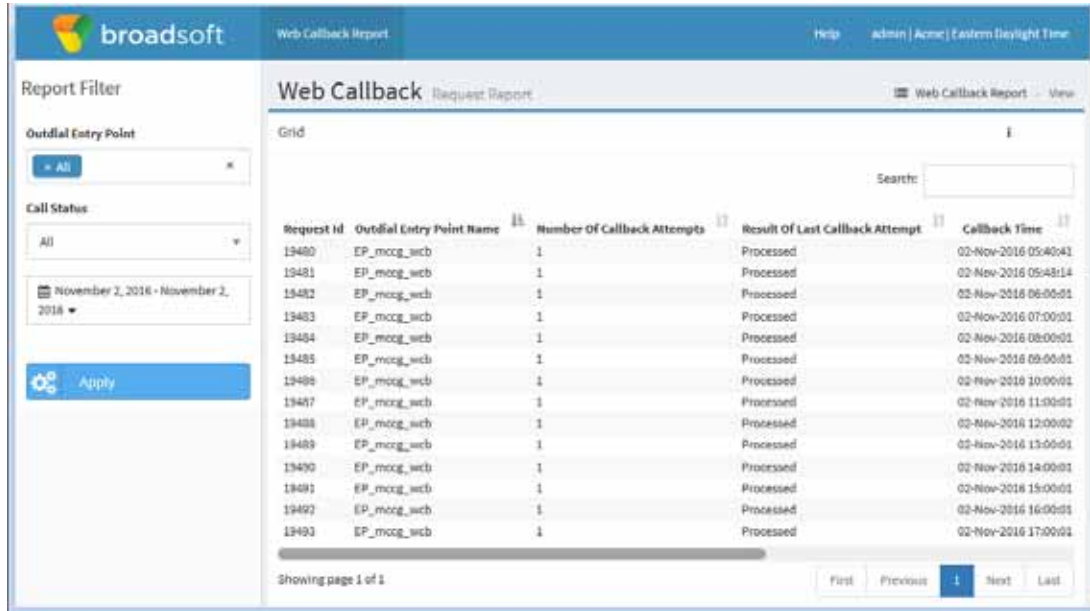


When you select **Custom Range**, additional controls appear for you to specify a date range of up to 30 days. Use the calendar controls to select start and end dates or type dates into the two fields.



5. Click **Update Report**.

The report displays requested callback details as described in the following table.



Column	Description
Request Id	An ID number assigned by the system to the callback request.
Outdial Entry Point Name	The name of the outdial entry point that was used to place the call to the requester.
Number of Callback Attempts	The number of times the system attempted to call the requester.
Results of Last Callback Attempt	For a description of each value that can appear in this column, see the table describing Call Status values on page 46 (beneath step 3).
Callback Time	The date and time the system placed the call to the requester.
Number	The phone number that the system used to call the requester.
First Callback Attempted Time	The time of the first callback to this requester.
Last Callback Attempted Time	The time of the last callback to this requester.
Created Date	The date the callback request was sent by the Callback Manager to the server.



Contact Routing

The CC-One Routing Strategy module facilitates the management and configuration of global contact-handling strategies. In addition to phone calls, the system can route email, fax and chat contacts.

The unique value behind the CC-One service is the ability to participate in contact handling from a global vantage point where adjustments can be made immediately to contact-distribution strategies. From a simple, user-friendly interface, supervisors can change routing strategies without knowing complex scripting languages. This allows your enterprise to maximize resources and respond quickly to changing conditions.

This chapter explains how to create scheduled routing and team capacity strategies and alter them in real time to optimize contact delivery, assign call flows, and create routing sequences. It also explains how to create call control scripts and audio files and how to make them available for use in routing strategies.

Note: The following features are not currently available in the CC-One Salesforce Edition: Multimedia, Scorecard Routing, Web Callback, and provisioning of call-associated data (CAD) variables.

Topics covered in this chapter:

- [About Contact Routing](#)
- [About Multimedia](#)
- [About Web Callback](#)
- [Working with Call Control Scripts](#)
- [Uploading and Updating Resource Files](#)
- [Viewing, Creating, Modifying, and Deleting Routing Strategies](#)
- [Routing Strategy Examples](#)
- [Scheduling Team Capacity](#)
- [Specifying Queue Precedence](#)
- [Audio on Hold](#)

About Contact Routing

The Routing Strategy module provides a flexible environment for routing contacts to the best resource, regardless of location. Each incoming contact arrives at an *entry point*, from where it is sent to *queue* for distribution among teams at call center sites according to scheduled routing strategies, scheduled team capacity strategies, and queue precedence settings specified in the Routing Strategy module.

In addition, if your enterprise uses the outdial feature, each outdial call passes through an outdial entry point and outdial queue according to routing strategies you specify in the Routing Strategy module.

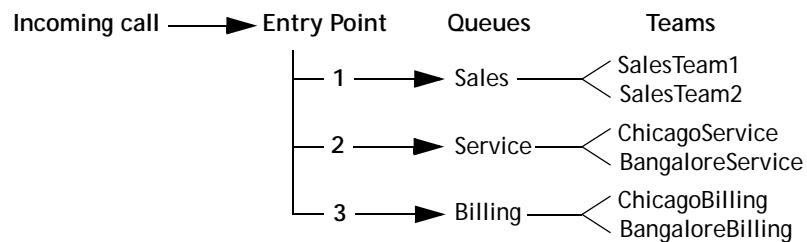
Note: Although the examples in the following sections refer to phone contacts, the same contact routing options are available to other media types.

Topics covered in this section:

- [Basic Contact Routing](#)
- [About Skills-Based Routing](#)
- [About CC-One Scorecard Routing](#)
- [About Queue Reshuffling](#)
- [About Global Routing Strategies](#)
- [About Team Capacity Strategies](#)
- [About Queue Precedence](#)

Basic Contact Routing

In the following example, an incoming call arrives at an entry point where the caller is presented with three options. After the caller selects an option, the call is sent to a queue, where it waits for an agent to become available on one of the teams servicing that queue.



Each entry point and queue is associated with one or more routing strategies, which control how calls are serviced at specified time intervals, including what call control script to use to treat the call and what audio file to play when a call arrives or is waiting in queue.

In addition, the routing strategy for a queue specifies which teams will receive calls and in what order, how long the call should wait in queue before being distributed to an overflow destination number, and failover settings for agents and teams. You can specify one of the following options for identifying an agent to service a call:

- **Longest Available Agent.** If multiple agents are available, the call is directed to the agent who has been available for the longest time.
- **Load Balance.** Incoming calls are distributed among a group of teams based on ratios specified in the strategy.
- **Priority Based.** Incoming calls are distributed to agent teams based on a priority rating assigned to each team.

A fourth option is available to enterprises that are provisioned with the optional Skills-Based Routing feature, described in the next section, [“About Skills-Based Routing.”](#)

In addition, Queue Reshuffling can be incorporated into the routing decision for all of the above routing options, as described in [“About Queue Reshuffling” on page 57.](#)

For more information, see [“Viewing, Creating, Modifying, and Deleting Routing Strategies” on page 81.](#)

About Skills-Based Routing

Skills-Based Routing is an optional CC-One feature that matches the needs of callers with agents who have the skills to best meet those needs. When calls arrive at an entry point, they are classified into subsets that can be routed only to agents who possess a requisite set of skills, such as language fluency or product expertise.

Skill requirements are assigned to calls based on settings in the routing strategy for the entry point. The calls are then sent to a queue for distribution to agents who have been assigned a matching set of skills. If an agent does not become available within a time interval specified in the queue routing strategy, the skill requirement can be removed or reduced.

The overall process for implementing skills-based routing involves the following steps:

1. **Define skills.** Four types of skills can be defined:
 - A **proficiency skill** can have a value ranging from 0 to 10 that represents the agent’s level of expertise in the skill. For example, you might define a skill for each language that your agents speak.

- A **boolean skill** can have the value of true or false to indicate whether or not the agent has the skill. For example, to ensure that your most valuable customers get the best service, you might define a skill named *PremierService* and assign it with a value of true to your most experienced agents.
- A **text skill** is a free-form text skill that must be matched exactly. For example, you might define a skill named *Extension* that will let you route a call to a specific agent's extension number based on digits entered by the caller in response to a prompt.
- An **enum skill** is a named set of predefined values. For example, you might create a skill named *Line of Business* that can have the values *Sales*, *Service*, and *Billing*, or a skill named *Operating System* that can have the values *Linux*, *Windows*, and *Unix*.

For more information, see “[Skill Definitions](#)” beginning on [page 317](#).

2. **Define skill profiles.** A skill profile is a set of skills that can be collectively assigned to a team or agent. Each skill in the profile is assigned a specific value. For example, a skill of English might be assigned a high level of proficiency in one skill profile and a lower level in another profile.

For more information, see “[Skill Profiles](#)” beginning on [page 319](#).

Note: In the current CC-One Salesforce Edition release, skill profiles can be assigned only to agents and not to teams.

3. **Assign skill profiles to teams or agents.** Each agent-based team can be assigned a skill profile. All agents logged in to the team will be associated with that skill profile. However, an individual agent can also be assigned a skill profile, which overrides the skill profile of the team.

For more information, see “[Teams](#)” beginning on [page 322](#) and “[Agent Accounts](#)” beginning on [page 351](#).

4. **Upload a call control script** that defines how to treat the call (see “[Uploading a Custom Control Script](#)” on [page 74](#)).

5. **Create the entry point and queue routing strategies.** In the entry point routing strategy, you assign skill requirements to calls based on menu selections collected during call treatment defined in the call control script (see “[Assigning Skill Requirements to Incoming Calls](#)” on [page 98](#)). The calls are then distributed to the specified queue where they wait for an agent who has been assigned the required skills.

In the queue routing strategy, you specify options for identifying agents to service the incoming calls. If an agent with the required skills does not become available within a specified time interval, the skill requirement can be removed or reduced.

For more information, see “[Viewing, Creating, Modifying, and Deleting Routing Strategies](#)” beginning on [page 81](#).

About CC-One Scorecard Routing

Note: This feature is not currently available in the CC-One Salesforce Edition.

Scorecard Routing is a BroadSoft CC-One offering that provides cross-ACD call routing. In CC-One Scorecard Routing, calls arriving at an entry point can be routed to queues across multiple ACDs. The queues receiving the calls can belong to the CC-One ACD or customer premise ACDs.

Queues on external ACDs are represented as *proxy queues* in the CC-One system. Calls sent to an external ACD are distributed to agents by the external ACD. CC-One uses proxy queues to track the call activity that occurs on those external ACD queues. If one of the destinations in a cross-ACD routing is a standard CC-One queue, the CC-One ACD distributes the calls to the CC-One agent.

A proxy queue can be dedicated or shared. A *dedicated* proxy queue is a queue used exclusively for the CC-One customer.

In the routing strategy for a cross-ACD entry point, you organize the queues that will be served by the entry point into one or more prioritized groups and specify one of the following call-routing algorithms to determine which queue will receive the call (for instructions, see [“Specifying Call Distribution for a Cross-ACD Entry Point” on page 108](#)):

- **Static Load Balance.** Calls are allocated based on the load spread percentage specified for the queues, irrespective of current queue size or handle times.
- **Weighted Routing.** Calls are allocated based on the weights of metrics specified for each queue. These metrics can be classified into two general types: service level metrics (SLM) and business metrics.

Service Level Metrics

The service level metrics used in weighted routing can be derived from multiple sources:

- **Vendor Provided.** Metrics periodically posted by the vendor.
- **Realtime.** Real-time metrics computed and tracked by the CC-One service.
- **Historical.** The CC-One service loads six-week rolling historical data from the call data processor database daily. This data is computed and stored by each minute.

Each proxy queue is provisioned with a *Metrics Data Precedence* setting that defines the order in which the system looks for the above metrics data.

Business Metrics

The Provisioning module provides an interface for defining business metrics to make them available for selection in a routing strategy (see “[Business Metrics](#)” on page 321). Each business metric is assigned one of the following variable types:

- **Direct Variable.** The variable’s impact on the routing decision increases as the value of the variable *increases*, for example, *Conversion Rate*.
- **Inverse Variable.** The variable’s impact on the routing decision increases as the value of the variable *decreases*, for example, *Cost*.

High-Level Logic of Weighted Routing

In Weighted Routing, you define one or more prioritized sets of variables for use in the routing decision. Then, for each queue, you assign weights to the variables. The total weight of all variables within a priority set must add up to 100.

When a call comes in, each queue’s proportions are compared by adding up the weighted variable values in the first priority set and dividing by the number of variables in the set. The call is sent to the queue with the best value.

If multiple queues are equivalent, a weighted value of the variables in the second priority set is computed for each queue, and each queue’s proportions are again compared. The call is sent to the queue with the best value or, if multiple queues are equivalent, the process is repeated if additional priority sets have been defined.

In addition to business metrics, several other parameters are considered in the routing decision. The following logic is used to determine which queue will receive a call.

1. Consider the queues from the first group.
2. If there are one or more dedicated queues in the group, check for logged-in agents:
 - a. If no agents are logged in, exclude the queue from the routing decision.
 - b. If agents are logged in to the queue, but none are available, set the average speed of answer (ASA) for the queue to be the average handle time (AHT).
3. Filter out the following queues:
 - Queues with an ASA value greater than their specified *Max SLM* settings.
 - Queues that have exceeded their specified *Percentage Clamp* settings during the *Compute Interval* period specified (in seconds) for the routing strategy. (Percentage clamp specifies the maximum percentage of calls that should be sent to the queue during the interval.)

- Queues that have exceeded their provisioned *Maximum DNIS Retries* setting.
 - Queues that have reached their specified *Capacity*, which identifies the number of active agents who can handle calls for the queue.
 - Queues for which both of the following conditions are true:
 - The system has already routed the number of calls specified for the queue in the *Abandoned Call Threshold* setting during the *Compute Interval* period.
 - The percentage of abandoned calls for the queue is equal to or greater than the *Abandoned %* setting specified for the queue.
4. If only one queue is left after the filtering, send the call to that queue.
 5. If one or more queues are left after the filtering, send the call to the queue with the highest positive differential in the percentages generated from inverse proportional values for inverse variables and proportional values for direct variables. This value is determined as follows:

Suppose there are three queues—Queue 1 (ASA=20), Queue2 (ASA=30), and Queue3 (ASA=40). The proportions will be computed as $90/20:90/30:90/40$. This results in a ratio of 4.5:3:2.25. Now the ratio of calls to be sent to each site will be $4.5/9.75:3/9.75:2.25/9.75$. This evaluates to 46.1%:30.7%:23.2% respectively.

Call 1 arrives, and since Queue1 has the highest positive differential (0% sent and 46.1% needed evaluates to a differential of 46.1), the call is sent to Queue1.

Call 2 arrives, and now the differentials are $((46.1\% - 100\%) = -53.9\%$, 30.7%, 23.2%), so the call goes to Queue2 because it has the highest positive differential of 30.7.

6. If no queues are left after the filtering:
 - Select the next group and go back to step 2.
 - OR -
 - If this is the last group, reconsider all queues and apply relaxation settings to filters in cycles until a destination queue is identified. As soon as a queue is identified, send the call to that queue.

Relaxation settings are described in the following table.

Filter	Relaxation Attribute	Allowed Values
Abandons	Abandon %	A number that increases the <i>Abandoned %</i> value specified for the queue. Each relaxation will increase the percentage as a cumulative. For example, if the original value is 10% and the relaxation for the first cycle is set to 10, then the new value will be 20% in the first relaxation cycle. If the relaxation for the second cycle is set to 10, the new value will be 30% in the second relaxation cycle.
	Call Threshold	A number that increases the number of calls specified for the queue in the <i>Abandoned Call Threshold</i> setting during the <i>Compute Interval</i> period before the abandons filter is applied. You can easily stop the system from applying the abandons filter on a queue by increasing this relaxation value to a high number.
Areacode-Blocking	Remove Blocking	Two values are allowed: <ul style="list-style-type: none"> • 0 means do not relax. • 1 means relax area code blocking for the queue.
Clamp Reached	Clamp %	A number that increases the <i>Percentage Clamp</i> value specified for the queue. Each relaxation will increase the percentage as a cumulative. For example, if the original value is 10% and the relaxation for the first cycle is set to 10, then the new value will be 20% in the first relaxation cycle. If the relaxation for the second cycle is set to 10, the new value will be 30% in the second relaxation cycle.
Metric Exceeded	Metric Increment	A number that increases the <i>Max SLM</i> value specified for the queue. Each relaxation will increase the percentage as a cumulative. For example, if the original value is 70000 milliseconds and the relaxation for the first cycle is set to 10000 milliseconds, then the new value will be 80000 milliseconds in the first relaxation cycle. If the relaxation for the second cycle is set to 10000, the new value will be 90000 milliseconds in the second relaxation cycle.

Filter	Relaxation Attribute	Allowed Values
Capacity	Capacity	A number that increases the default <i>capacity</i> for the queue. This value overrides system computed capacity. For example, if the default capacity is 25, and the relaxation for the first cycle is set to 5, then the capacity will be increased to 30 in the first relaxation cycle.
	Load Factor	A multiple of the queue's <i>capacity</i> that increases the capacity. For example, if the original capacity of the queue is 14, and load-factor is 1.5, then the number of active calls that can be sent to the queue will be increased to 21 when this relaxation attribute is applied to the queue.

See [“Specifying Call Distribution for a Cross-ACD Entry Point”](#) on page 108 for more information.

About Queue Reshuffling

Queue Reshuffling is a CC-One option that can be used with all available contact routing methods. The reshuffling engine associates a score to each contact in the queue based on various factors, such as the importance of the customer or the due time of a particular contact according to service level agreements (SLAs).

A score of between 0 and 1 is associated with each contact. For example, if there are two email contacts in queue and one is due tomorrow, while the second one is due the day after, the engine can assign the first email a score of 0.9 and the second a score of 0.8. This way, the email contact with the earliest due time will be handled first. The same logic can be applied when there are more than two contacts.

If contacts are waiting in queue for an available agent, the routing engine sorts the queue based on the score associated with each contact. The contact with the highest score is assigned to the first available agent. The queue reshuffling engine can change the score for any or all contacts at any time.

You can implement queue reshuffling by working with BroadSoft Operations to assign scores to contacts through IVR data dips or via an external entity. Alternatively, BroadSoft Professional Services can help set a score through an API.

About Global Routing Strategies

A global routing strategy can be associated with more than one entry point or queue. When a contact arrives, the routing engine checks for a global routing strategy associated with the entry point or queue for the current time. If one exists, that global strategy becomes the current strategy, overriding any standard strategy associated with the entry point or queue.

Creating a global routing strategy enables you to quickly and easily change the routing strategies for many entry points or queues at once rather than separately changing each individual routing strategy in the event of emergency.

About Queue Precedence

A team can handle contacts from more than one queue. You can assign an agent to take contacts from more than one queue by adding that agent's team to the routing strategies for multiple queues. To cause an agent team to prioritize contacts from one queue ahead of contacts to other queues, you can set a priority for each queue by using the settings available on the Queue Precedence page. For details, see [“Specifying Queue Precedence” on page 145](#).

About Team Capacity Strategies

Your enterprise can use agent-based teams or capacity-based teams or a mixture of both team types. Capacity-based teams do not have specific agents assigned to them, and the agents do not use the CC-One Agent Desktop.

Each capacity-based team is provisioned with a static capacity value (see [“Teams” beginning on page 322](#)). This value represents the number of simultaneous contacts the team can handle.

You can create scheduled team capacity strategies to override these settings in response to changing contact center conditions. If a team capacity strategy is not created for a capacity-based team, the system uses the capacity value provisioned for the team. For details, see [“Scheduling Team Capacity” on page 140](#).

About Multimedia

Note: This feature is not currently available in the CC-One Salesforce Edition.

If your enterprise uses chat and email routing offered by CC-One in addition to voice, then Multimedia and Multimedia Extensions are enabled. You will be able to associate sites and agents with multimedia profiles and multimedia extensions.

The overall process for implementing multimedia routing involves the following steps:

- 1. Define multimedia profiles.** If your enterprise subscribes to the CC-One Multimedia feature, each agent is associated with a multimedia profile, which specifies how many of each media type the agent can handle concurrently. For more information, see [“Multimedia Profiles”](#) beginning on [page 307](#).
- 2. Assign multimedia profiles to sites, teams, or agents.** When Multimedia is enabled, every site is associated with a multimedia profile. Each agent-based team at a given site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team’s profile unless the agent is assigned a different multimedia profile. For more information, see [“Adding a Site”](#) beginning on [page 312](#), [“Adding a Team”](#) beginning on [page 322](#), and [“Adding an Agent”](#) beginning on [page 352](#).
- 3. Define multimedia extensions.** When Multimedia Extensions are enabled, each agent can be associated with a multimedia extension, which identifies the enabling module for each media type the agent can handle. For more information, see [“Multimedia Extensions”](#) beginning on [page 310](#).
- 4. Assign multimedia extensions to sites or agents.** Every site can be associated with a multimedia extension. Each agent at a given site is associated with the multimedia extension assigned to that site unless the agent is assigned a different multimedia extension.
- 5. Create separate entry points and queues for each media type.** For more information, see [“Adding an Entry Point or Queue”](#) beginning on [page 295](#).
- 6. Work with Broadsoft Operations to create routing strategies configured to use a specialized call control script.**
- 7. Work with your specific CRM vendor to configure the multimedia interaction at the agent level.**

About Web Callback

Note: This feature is not currently available in the CC-One Salesforce Edition.

The BroadSoft CC-One Web Callback feature enables visitors to your enterprise's Web site to complete and submit a callback request specifying a name, phone number, and callback time. The request is sent to the CC-One system for scheduling. When the callback time is reached, a call to the requester is initiated on an outbound entry point that is used exclusively for Web callbacks.

The routing strategy for Web Callback uses a specialized call control script that typically includes IVR treatment that requires input from the callback requester to proceed.

- If the requester answers and responds to the voice prompts appropriately, then the call is connected to an available agent and the callback request is marked as processed.
- If the call fails (for example, the call is not answered or is answered by a recorded message or a busy signal), the callback is optionally rescheduled based on the maximum callback attempts allowed and the retry attempt interval provisioned for your enterprise.
- If the requester rejects the call, the callback request is marked as cancelled.

Callback request details are displayed in a report that you can access from the CC-One Management Portal (see [“Viewing a Web Callback Request Report”](#) on page 46).

The overall process for implementing Web Callback involves the following tasks:

1. Creating a Web page to capture the Web callback details and posting them to the CC-One Web Callback service.
2. Specifying the maximum callback attempts allowed and the retry attempt interval (see [“Tenant Settings”](#) beginning on page 290).
3. Creating the outdial entry points to use for Web callbacks (see [“Adding an Entry Point or Queue”](#) beginning on page 295).
4. Working with Broadsoft Operations to create routing strategies configured to use a specialized call control script.

Working with Call Control Scripts

A call control script defines how a call is handled when it arrives at an entry point or queue. The Control Scripts page in the Routing Strategy module displays a list of call control scripts and provides authorized users with an interface for creating and editing control scripts.

After a control script is created, authorized users can associate it with a routing strategy for an entry point or queue and specify values for any configurable parameters that are in the script, such as which sound file to play when a call arrives, or the timeout value for entering digits in response to a prompt (see “[Assigning Call Control Scripts and Parameters](#)” on page 96).

Topics covered in this section:

- [Creating a Call Control Script](#)
- [Call Control Block Descriptions](#)
- [Copying or Modifying a Call Control Script](#)
- [Uploading a Custom Control Script](#)
- [Updating a Custom Control Script](#)
- [Uploading and Updating a Custom Control Script Image File](#)
- [Viewing and Exporting References to a Control Script](#)

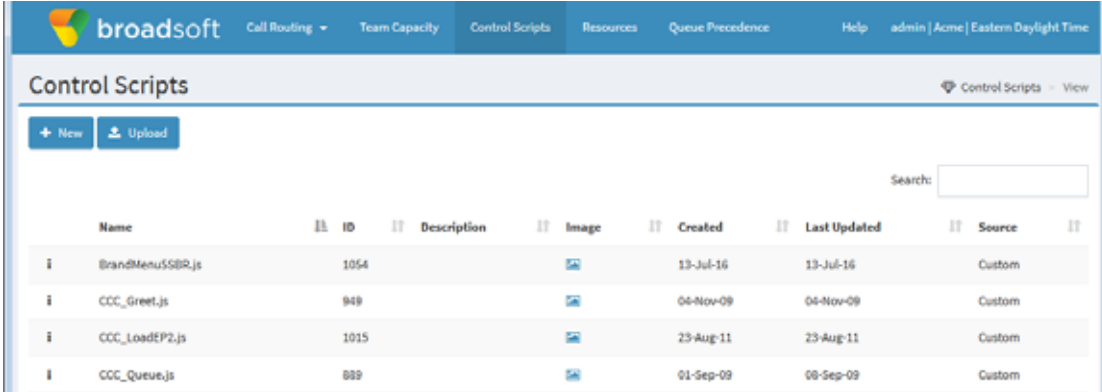
Creating a Call Control Script





The New button on the Control Scripts page provides access to the call flow builder interface where authorized users can create a control script for an entry point or queue.

To create a call control script:

1. Open the **Routing Strategy** module and click the **Control Scripts** button.

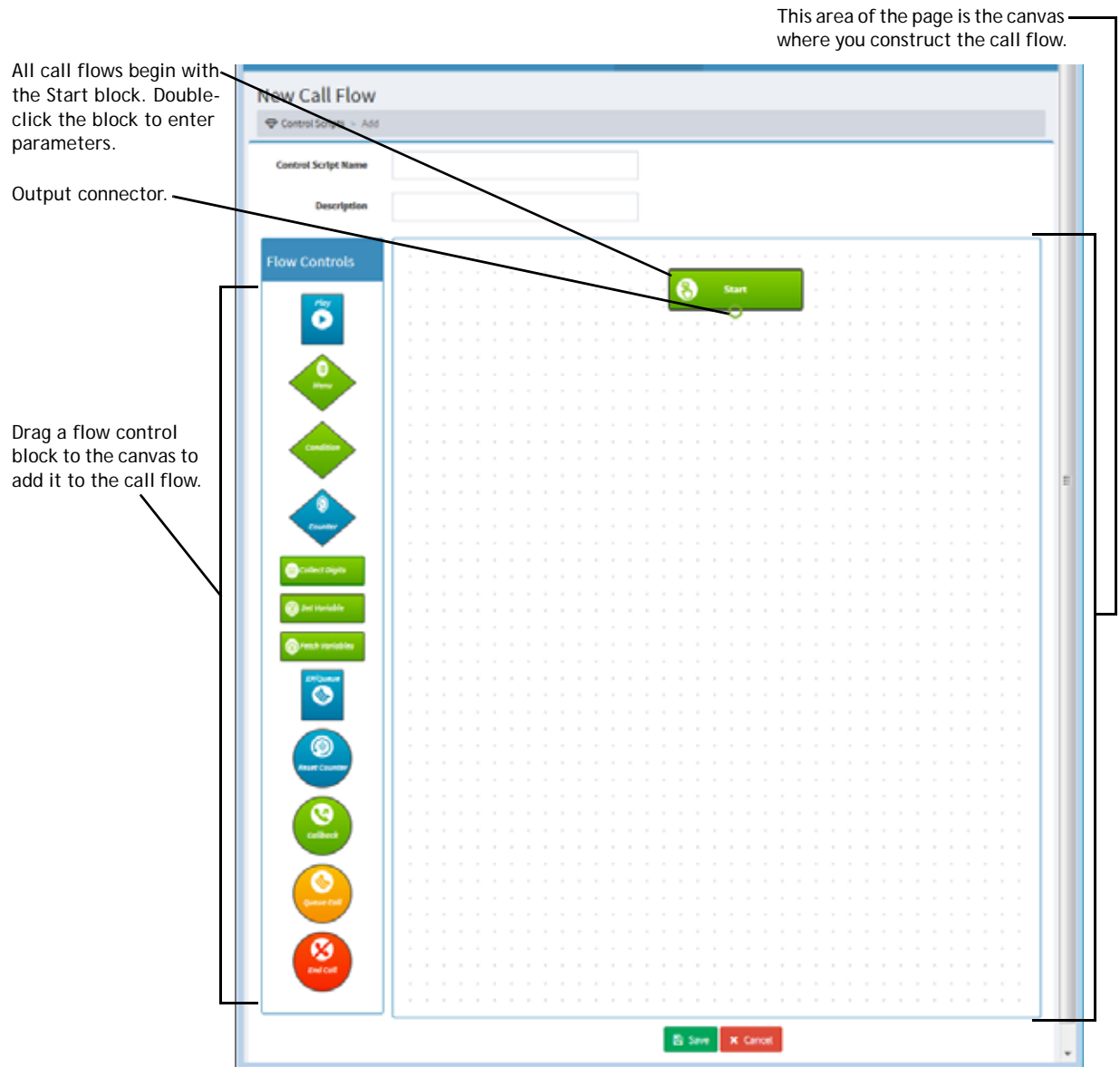
The page displays the list of control scripts and associated image files.



Name	ID	Description	Image	Created	Last Updated	Source
BrandMenuSGBR.js	1054			13-Jul-16	13-Jul-16	Custom
CCC_Greet.js	948			04-Nov-09	04-Nov-09	Custom
CCC_LoadEP2.js	1015			25-Aug-11	25-Aug-11	Custom
CCC_Queue.js	889			01-Sep-09	08-Sep-09	Custom

2. Click **New**.

The New Call Flow page appears, displaying a Start block in the canvas area. The panel on the left side of the page displays the building blocks for constructing a call flow. You can drag a block from this panel to the canvas to add it to the call flow.

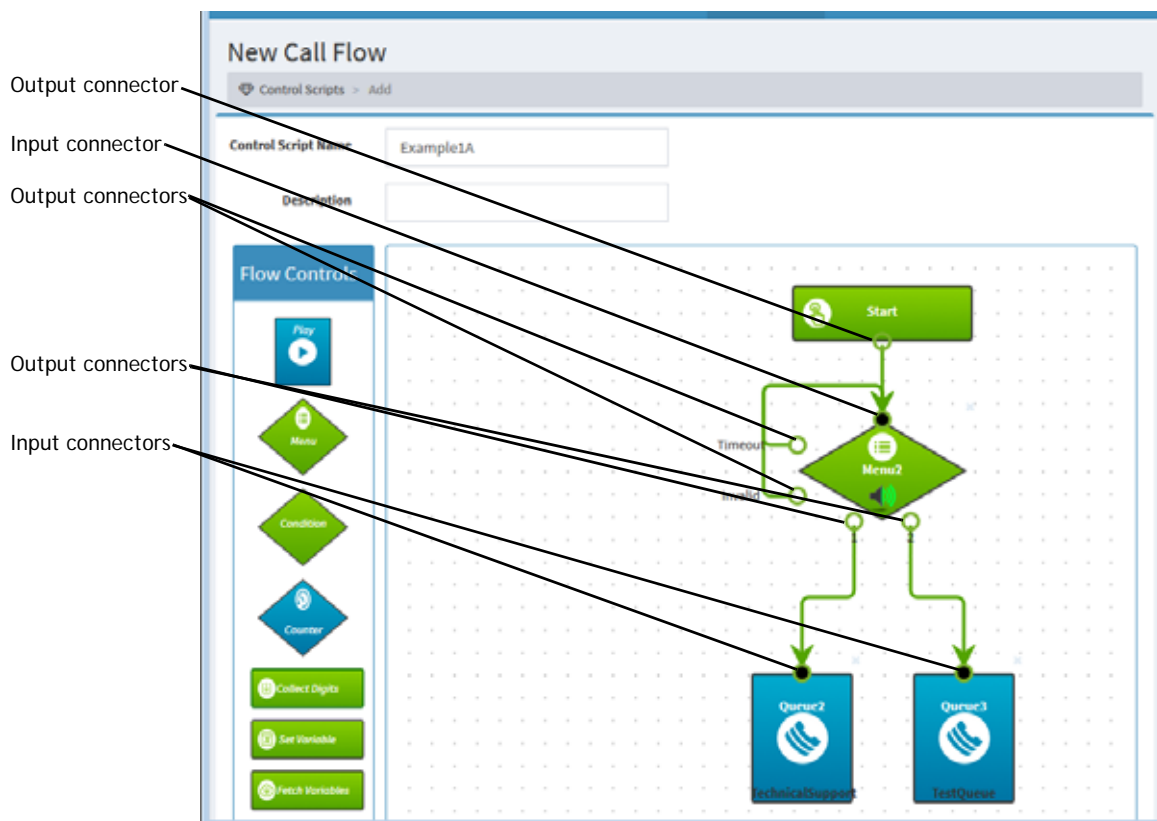


3. Enter a name and optionally, a description for the control script in the fields at the top of the page.
4. The name you enter will be displayed in the Control Script drop-down list for selection when users create or edit a routing strategy (see [“Assigning Call Control Scripts and Parameters”](#) beginning on [page 96](#)).

5. Double-click the **Start** block and specify the call flow type (entry point or queue) and other parameters in the dialog box that opens. For a description of each parameter, see “[Start Block](#)” on page 65.
6. Drag flow control blocks to the canvas to add them to the call flow. To remove a block from the canvas, click the **x** on the upper right side of the block.
7. After adding a flow control block, double-click the block and enter the required parameters in the dialog box that opens. For a description of each block and its parameters, see “[Call Control Block Descriptions](#)” beginning on page 65.
8. To connect the blocks, drag each output connector to the appropriate input connector.

All blocks except the *Start* block have one input connector, represented by a black-filled circle at the top of the block. All blocks except the *EP/Queue*, *Callback*, *Queue Call* and *End Call* blocks have one or more output connectors, represented by empty circles at the bottom and sides of the block.

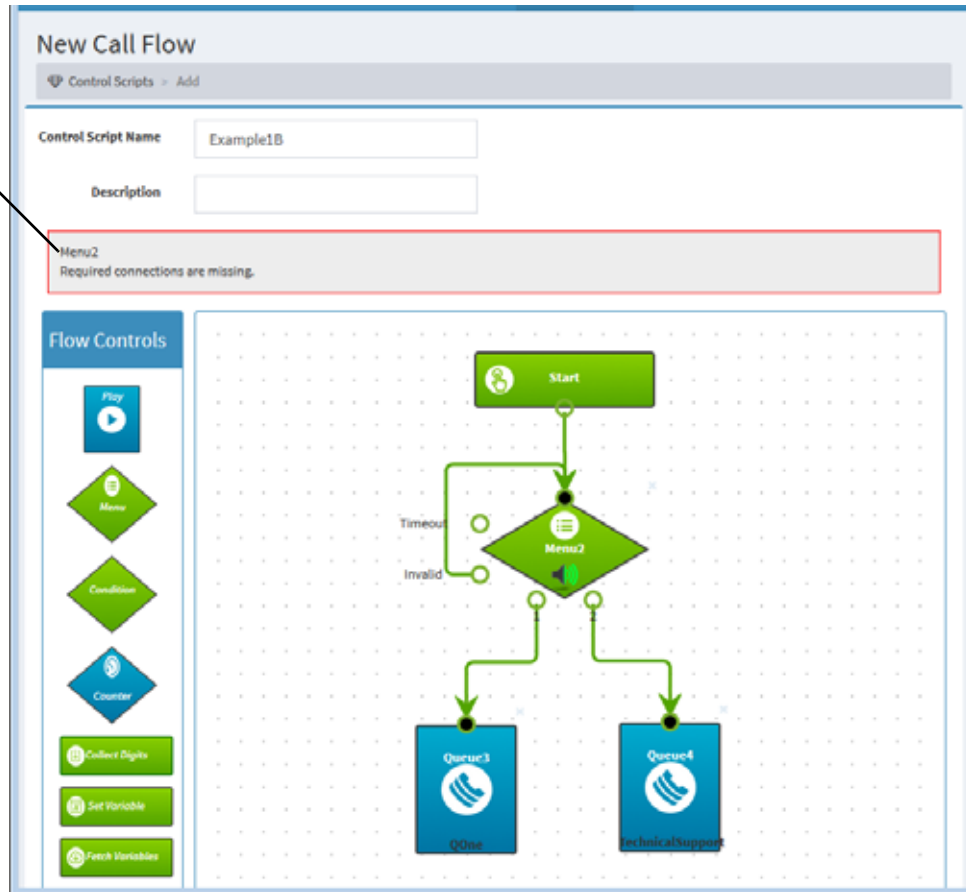
In the following example, the **Start** block is connected to a **Menu** block that plays an audio file prompting the caller to enter one of two options. The Menu block in this example has four outputs: one for each of two branches, plus Timeout and Invalid outputs, which are connected back to the Menu block’s input connector.



9. After you have finished adding and connecting blocks, click **Save** to save the control script.

The system automatically performs a validation. If errors are found, they are listed in a message at the top of the page. In the following example, a connection is missing for the Menu block's Timeout output. A control script cannot be saved until all errors are corrected.

Control script errors are displayed here after you click Save.



Call Control Block Descriptions

Call control blocks and their parameters are described in the following sections.


- [Start Block](#)
- [Play Block](#)
- [Menu Block](#)
- [Condition Block](#)
- [Counter Block](#)
- [Collect Digits Block](#)
- [Set Variable Block](#)
- [Fetch Variable Block](#)
- [EP/Queue Block](#)
- [Reset Counter Block](#)
- [Callback Block](#)
- [Queue Call Block](#)
- [End Call Block](#)

Note: Provisioned call-associated data (CAD) variables are not currently available in the CC-One Salesforce Edition. Contact BroadSoft Professional Services if you need this functionality.

Start Block



The Start block signifies the beginning of a call flow. All call control scripts must begin with a Start block. The Start block has the following parameters.

Parameter	Description
Type	<p>Select the call flow type: Entry Point or Queue.</p> <p>If you select Queue, the symbol for the Start block changes as shown below after you click OK.</p> 

Parameter	Description
Call Associated Data	<p>Specifies a comma-separated list of call-associated data (CAD) variables that are guaranteed to be associated with the call when it is delivered to the Agent Desktop, regardless of whether they are collected in IVR. This enables agent-editable fields that are not collected in IVR, such as a case number. (Note that these can still be filtered out by Agent Desktop settings provisioned for your enterprise.)</p> <p>Select or type the name of a CAD variable, then click + to add it to the list. Repeat for each additional CAD variable.</p> <p>Note: If you create a CAD variable in one of the call control blocks in the call flow, it will be delivered to the Agent Desktop along with the call.</p>
On IVR error go to	Specifies the destination to which calls are distributed when there is an error in IVR. By default, this is the overflow number provisioned for the entry point or queue, but you can select an entry point or queue from the drop-down list instead.
On Overflow go to	Specifies the destination to which calls are distributed when they exceed the <i>Maximum Time in Queue</i> setting specified in the routing strategy. By default, this is the overflow number provisioned for the entry point or queue, but you can select an entry point or queue from the drop-down list instead.
Maximum Calls	This parameter appears only if an entry point or queue other than the provisioned overflow number is selected for the <i>On Overflow go to</i> parameter. If the value entered here is smaller than the <i>Maximum Calls in Queue</i> provisioned for an entry point or queue, then when the number of calls in queue reaches this value, they will be sent to the entry point or queue specified in the <i>On Overflow go to</i> parameter.
Description	Optionally enter a description for the block.

Play Block



The Play block plays an uninterruptible message to the caller and has the following parameters.

Parameter	Description
Name	Enter a name for the play block or accept the default name.

Parameter	Description
Media	Do one of the following to specify the audio to play as a prompt: <ul style="list-style-type: none"> • Select WAV, and then select an audio file from the drop-down list. • Select TTS (text to speech), and then type the text to be converted to speech. Right-click to insert a CAD variable in the text that will be dynamically replaced with its value.
Description	Optionally enter a description for the block.

Menu Block



The Menu block plays an interruptible prompt, allowing the caller to enter a DTMF digit or symbol and take the configured branch for the entered digit or symbol. A menu can have from 1 to 10 branches.

The Menu block has the following parameters and outputs.

Parameter	Description
Name	Enter a name for the menu or accept the default name.
Media	Do one of the following to specify the audio to play as a prompt: <ul style="list-style-type: none"> • Select WAV, and then select an audio file from the drop-down list. • Select TTS (text to speech), and then type the text to be converted to speech. Right-click to insert a CAD variable in the text that will be dynamically replaced with its value.
Timeout	Specify the number of seconds to wait after prompting. If the caller does not enter data before the timeout, the call will take the Timeout path configured in the control script.
Number of Branches	Select the number of output branches.
Branch <N>	For each branch, select the DTMF digit or symbol that must be entered for the call to take that branch.
Description	Optionally enter a description for the block.

Output	Description
Branch <N>	Path to take if the caller enters a matching DTMF digit or symbol.
Timeout	Path to take if the caller does not enter data before the specified Timeout.
Invalid	Path to take if the caller enters a DTMF digit or symbol that does not match a branch.

Condition Block



The Condition block embodies a condition—for example, “AccountLevel equals Gold.” The call takes the True or False path depending on whether or not the condition is met.

The Condition block has the following parameters and outputs.

Parameter	Description
Operand 1	Select a CAD variable from the drop-down list.
Condition	Select an operator from the drop-down list: < (less than) != (not equal) > (greater than) == (equal to) >= (greater than or equal to) <= (less than or equal to) Contains
Operand Type	Select an option to specify whether Operand 2 is an existing CAD variable or a literal value that you specify.
Operand 2	Select an existing CAD variable name from the drop-down list or click the User specified button and type a literal value.
Description	Optionally enter a description for the block.

Output	Description
True	Path to take if the condition is met.
False	Path to take if the condition is not met.

Counter Block



The Counter block counts the number of times the call reaches this block. The Counter block has the following parameters and outputs.

Parameter	Description
Name	Enter a name for the counter.

Parameter	Description
Threshold	Enter the number of times the call can pass through this block before taking the alternate path.
Description	Optionally enter a description for the block.

Output	Description
No	Path to take if the threshold is not reached.
Yes	Path to take if the threshold is reached.

Collect Digits Block



The Collect Digits block plays an interruptible prompt and collects a DTMF string (digits 0 – 9) of a specified length from the caller.

Note: The # character signifies end of input.

The Collect Digits block has the following parameters and outputs.

Parameter	Description
Call Associated Data	Select the name of the call-associated data (CAD) variable to which the entered data will be stored.
Media	Do one of the following to specify the audio to play as a prompt: <ul style="list-style-type: none"> Select WAV, and then select an audio file from the drop-down list. Select TTS (text to speech), and then type the text to be converted to speech. Right-click to insert a CAD variable in the text that will be dynamically replaced with its value.
Timeout	Specify the number of additional seconds the user has to enter the requested string after the audio message has finished playing or after the last key press, whichever comes later. If the timeout is reached, the call takes the Timeout path configured in the control script.
Maximum Number of Digits	Specify the maximum DTMF string length.
Minimum Number of Digits	Specify the minimum DTMF string length.
Description	Optionally enter a description for the block.

Output	Description
OK	Path to take if the caller enters an acceptable DTMF string.

Output	Description
Timeout	Path to take if the caller does not enter acceptable data before the timeout is reached.
Invalid	Path to take if the caller enters a DTMF string that is too long or too short.

Set Variable Block



The Set Variable block sets a variable and gives it a literal value. The Set Variable block has the following parameters.

Parameter	Description
CAD Name	Select or enter the name of a call associated data (CAD) variable.
Value	Enter the value to set on the CAD variable.
Description	Optionally enter a description for the block.

Fetch Variable Block



The Fetch Variable block retrieves CAD values from an external source. For example, this block could be used to retrieve information from an external database based on an account number retrieved through a preceding Collect Digits block, and associate the retrieved information with the call.

The Fetch Variables block has the following parameters and outputs.


Parameter	Description
URL	Enter the URL from which the variables are to be retrieved.
Request Variables	Specifies a comma-separated list of CAD variables to be sent on the request. Select the name of a CAD variable, then click + to add it to the list. Repeat for each additional CAD variable.
Response Variables	Specifies a comma-separated list of CAD variables to be returned from the external source. Select or type the name of a CAD variable, then click + to add it to the list. Repeat for each additional CAD variable.
Description	Optionally enter a description for the block.

Output	Description
Error	Path to take if there is no response or if the response is not valid.

EP/Queue Block



The EP/Queue block transfers control of the call to a queue or entry point and has the following parameters and no outputs.

Parameter	Description
Name	Enter a name for the block or accept the default name.
EP/Queue	Select an entry point or queue from the drop-down list. If you select an entry point, the symbol for the call control block changes as shown below after you click OK. 
Description	Optionally enter a description for the block.

Reset Counter Block



The Reset Counter block resets the internal counter of a Counter block. The Reset Counter block has the following parameters.

Parameter	Description
Counter	Select the name of the counter to be reset.
Description	Optionally enter a description for the block.

Callback Block



The Callback block is available only if the Voice Callback feature is enabled for your enterprise.

The Callback block sends a callback request to the Web callback entry point where it is queued until an agent is available. This block has the following parameters and no outputs.

Parameter	Description
Name	Enter a name for the block or accept the default name.
Outdial EP	Select an outdial entry point for Web callback from the drop-down list.
Callback Number	Select the CAD variable containing the callback number, such as the ANI that came in with the call or a number collected in a Collect Digits block in the call flow. If no selection is made, the caller's ANI will be used.
WCB CAD	Optionally you can select other CAD values that came in with the call for delivery along with the callback request.
Description	Optionally enter a description for the block.

Queue Call Block



The Queue Call block places the call in the queue. This block can only be used in queue scripts and has the following parameters and no outputs.

Parameter	Description
Name	Enter a name for the block or accept the default name.
Music in Queue	Select a media file from the drop-down list.
Description	Optionally enter a description for the block.

End Call Block



The End block terminates the call. This block has no parameters and no outputs.


Copying or Modifying a Call Control Script

You can copy or modify a control script that was created using the call flow builder interface available when you select the *New* button on the Control Scripts page. Custom control scripts can be modified only by BroadSoft Professional Services, after which they must be updated as described in [“Updating a Custom Control Script” on page 75](#).

To copy or modify a call control script:

1. Open the **Routing Strategy** module and click the **Control Scripts** button.

The page displays the list of control scripts and associated image files along with creation date, date of last update, and source—*Custom* or *Call Flow Builder*. You can copy or modify a control script only if the source is *Call Flow Builder*.

2. Click the  button to the left of a listed control script and select **Copy** or **Edit**.
3. Make your changes. For details about available settings and how to add, remove, and configure call control blocks see [“Creating a Call Control Script”](#) beginning on [page 61](#) and [“Call Control Block Descriptions”](#) beginning on [page 65](#).
4. Click **Save**. The system automatically performs a validation.

If errors are found, they are listed in a message at the top of the page. You must correct the errors before you can save the script.

5. If you are modifying a control script that has been assigned to a routing strategy, it must be reassigned to the routing strategy as follows:
 - a. Click the **Call Routing** button on the menu bar, select the routing strategy to which the control script was previously assigned, and click **Edit**.
 - b. In the **Call Control** section of the page, re-select the control script from the drop-down list, edit parameters if necessary, and then click **Apply**.
 - c. Click **Update** to save your changes to the routing strategy.

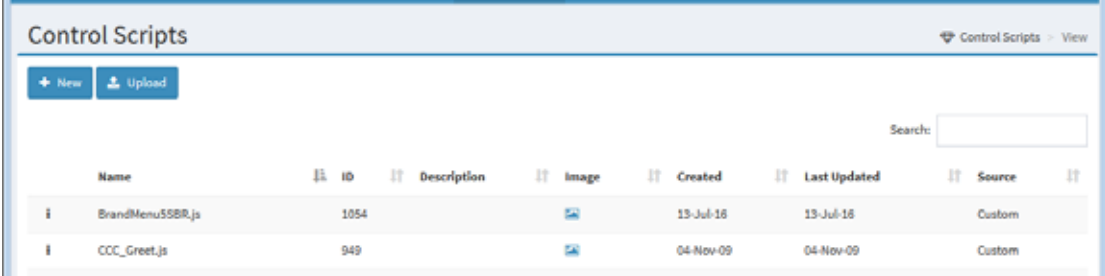
Uploading a Custom Control Script



Custom control scripts are created by BroadSoft Professional Services and must be uploaded to the CC-One system before they can be assigned to routing strategies. If a custom control script changes, it must be re-uploaded to the CC-One system in order for those changes to take effect.

To upload a custom control script:

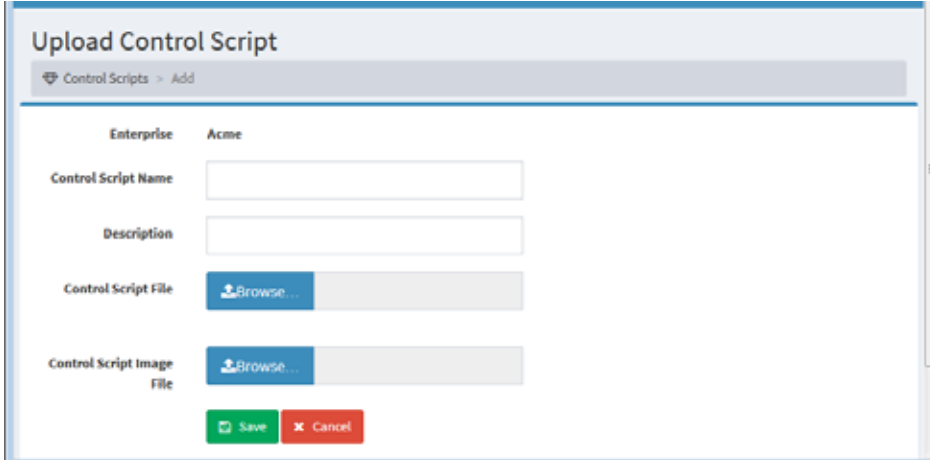
1. Open the **Routing Strategy** module and click the **Control Scripts** button on the menu bar.

The page displays the list of scripts and associated image files.



Name	ID	Description	Image	Created	Last Updated	Source
BrandMenuSSBR.js	1054			13-Jul-16	13-Jul-16	Custom
CCC_Greet.js	949			04-Nov-09	04-Nov-09	Custom

2. Click **Upload**. The Upload Control Script page appears.



Enterprise: Acme

Control Script Name:

Description:

Control Script File:

Control Script Image File:

3. Enter a name and optionally, a description for the script in the data fields.
4. Click the **Browse** button to the right of the **Control Script File** field and, in the dialog box that opens, navigate to the script file in your system and click **Open**.


The dialog box closes and the File field displays the path and file name of the uploaded file. If you entered a different file name in the Control Script Name field, it is overwritten by the name of the file you uploaded. You can change the text in the Control Script Name field if you want to.

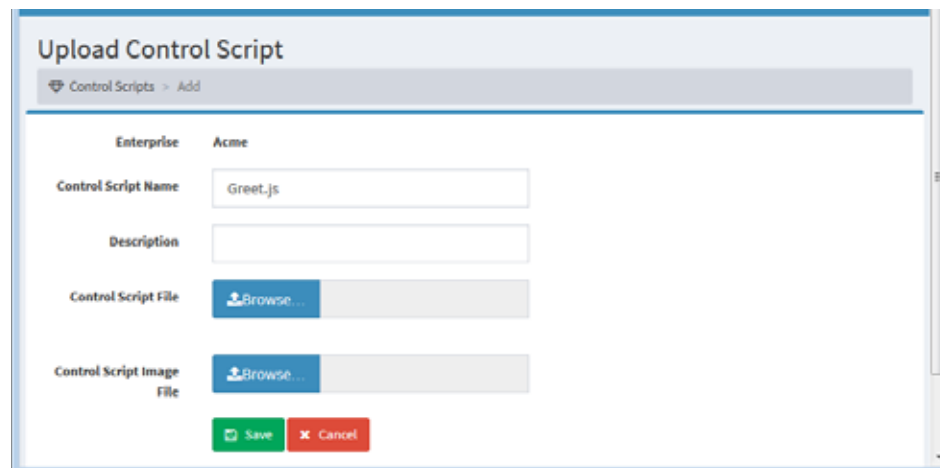
5. Optionally upload the associated control script image file as follows: click the **Browse** button to the right of the **Control Script Image** field and, in the dialog box that opens, navigate to the image file in your system and click **Open**. Only GIF and JPEG file formats are supported.
6. Click **Save**. The script is uploaded and available for selection from the Control Scripts list (see “Assigning Call Control Scripts and Parameters” on page 96).

Note: To copy a custom control script, upload it as described, but enter a different name in the Control Script Name field. The control script will be uploaded and saved under the new name.

Updating a Custom Control Script

To update a custom control script:

1. Open the **Routing Strategy** module and click the **Control Scripts** button on the menu bar.
2. Click the  button to the left of the custom control script that has been changed and select **Edit**. The Edit Control Script page appears.



3. Leave the **Name** field unchanged and enter a new description if desired.
4. Click the **Browse** button in the **Control Script File** field and, in the dialog box that opens, navigate to the control script file in your system and click **Open**.
5. Optionally, upload the associated control script image file as follows: click the **Browse** button in the **Control Script Image** field and, in the dialog box that opens, navigate to the image file in your system and click **Open**. Only GIF and JPEG file formats are supported.
6. Click **Save** to save your changes.

7. Click the **Call Routing** button on the menu bar, select the routing strategy to which the control script was previously assigned, and click **Edit**.
8. In the **Call Control** section of the page, re-select the control script from the drop-down list, edit parameters if necessary, and then click **Apply**.
9. Click **Update** to save your changes to the routing strategy.

Uploading and Updating a Custom Control Script Image File


You can view the image file associated with a control script on the Control Scripts page or by clicking the **Image** link in the Call Control section of the Create Routing Strategy or Edit Routing Strategy page (see “[Assigning Call Control Scripts and Parameters](#)” on page 96 for more information). Only GIF and JPEG file formats are supported.

When a control script is created or modified using the call flow builder interface available through the New button on the Control Scripts page, the associated image file is available in the Routing Strategy module when the control script is saved. However, image files associated with custom control scripts created by BroadSoft Professional Services must be manually uploaded and updated.

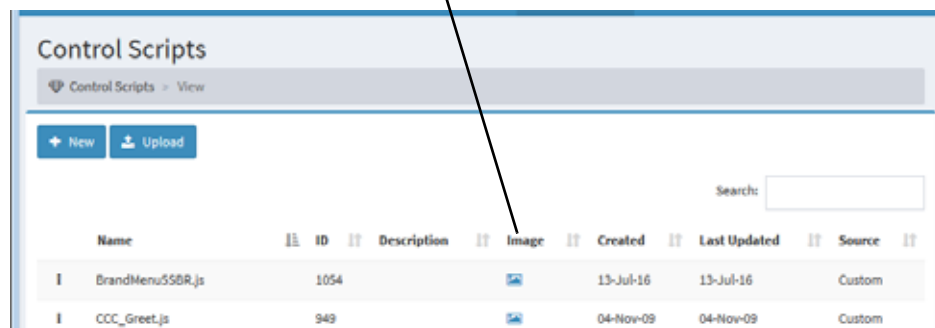
To upload or update the image file associated with a custom control script:

1. Open the **Routing Strategy** module and click the **Control Scripts** button on the menu bar.

The page displays the list of uploaded scripts and associated image files.

2. Click the  button in the **Image** column that corresponds to the custom control script for which you want to view, upload, or update the associated image file.

Click a button in this column to view, upload, or update an associated image file.



3. Do one of the following:
 - In the Call Flow Image dialog box, click the **Browse** button and in the dialog box that opens, navigate to the image file in your system and click **Open**.
 - OR-
 - Open the directory on your system where the image file is located and then drag and drop it into the designated area of the Call Flow Image dialog box.

4. In the Call Flow Image dialog box, click **Save** to upload the image.


Viewing and Exporting References to a Control Script

You can view or export a list showing the name of each routing strategy that references a specified control script along with the name of the associated entry point or queue. In the case of a global routing strategy, the list shows **0** instead of the name of an entry point or queue.

To view or export references to a control script:

1. Open the **Routing Strategy** module and click the **Control Scripts** button on the menu bar.

The page displays the list of control scripts and associated image files.

2. Click the  button to the left of a listed control script and select **Excel** or **CSV**.
3. In the dialog box that opens, specify whether to open or save the file.

Uploading and Updating Resource Files

The Resources page in the Routing Strategy module provides an interface for performing the following tasks:

- [Uploading a Resource File](#)
- [Playing or Downloading a .wav File](#)
- [Updating a Resource File](#)
- [Copying a Resource File](#)
- [Exporting the References to a Media File](#)

Uploading a Resource File

After creating resources such as audio-on-hold files, you must upload them to the Management Portal to make them available for use in routing strategies. Resource files with an extension of *.wav*, *.ulaw*, *.au*, and *.php* are supported.

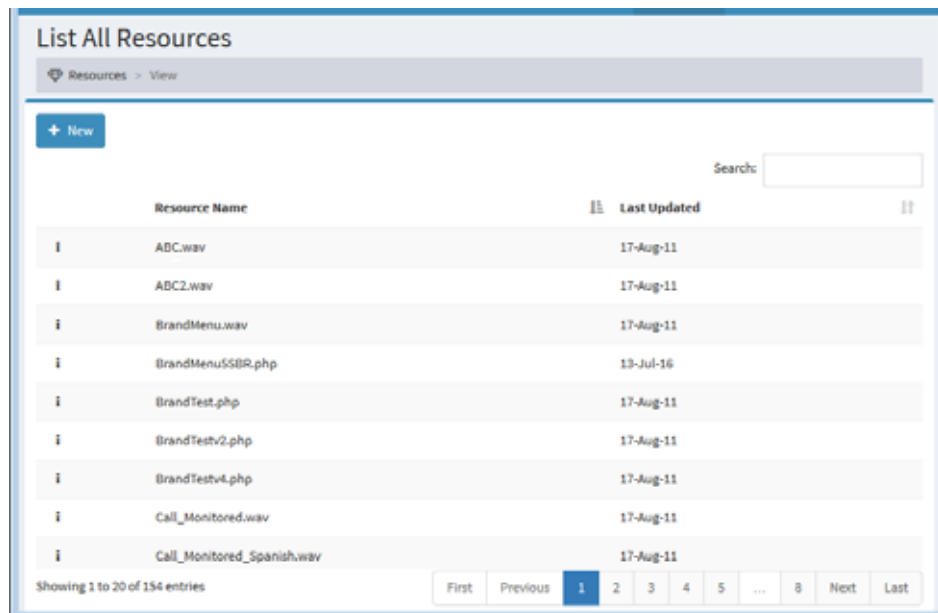
The names of all uploaded resource files are displayed in a drop-down list available when you create or modify a routing strategy. The names of uploaded audio files are displayed in the Media panel on the New Call Flow or Edit Call Flow page when you create or modify a control script.

Keep the following in mind:

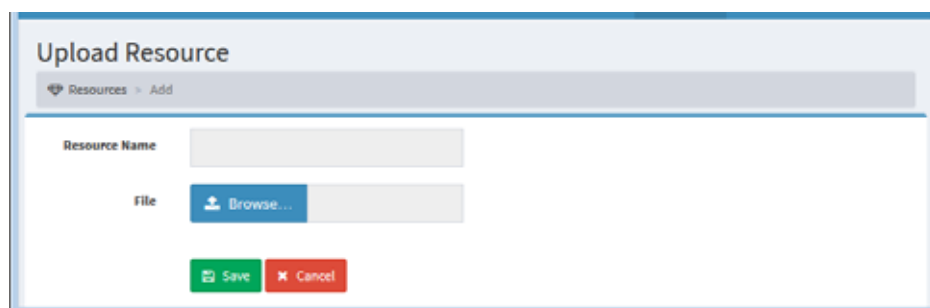
- Make sure that uploaded files have the correct file-name extensions and are properly formatted.
- You must save your resource files for record-keeping purposes because no version control is available.

To upload a resource file:

1. Open the **Routing Strategy** module and select the **Resources** button to display the list of uploaded resource files.



2. Click **New** and on the page that appears, click **Browse**.




3. In the dialog box that opens, navigate to the file in your system and click **Open**.

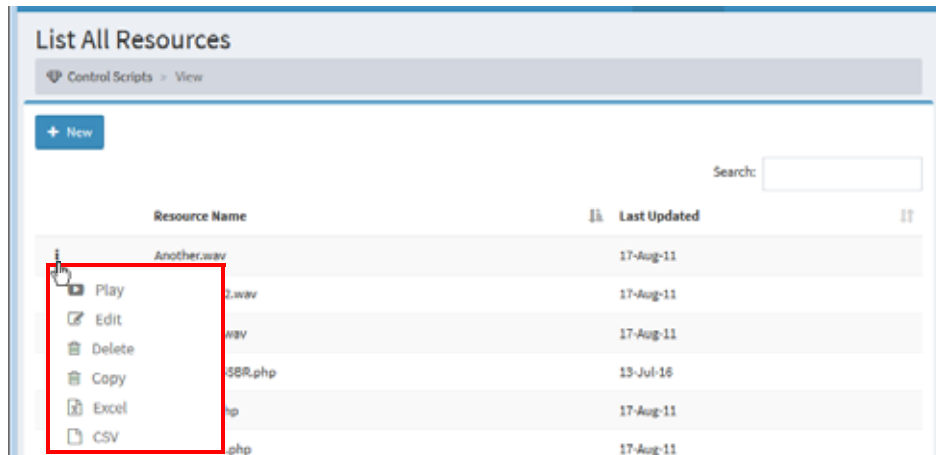
The dialog box closes, the File field displays the path and file name of the uploaded file, and the Resource Name field displays the file name.

4. Click **Save**. The file is uploaded and available for selection when you create or modify a routing strategy.

Playing or Downloading a .wav File

To play or download a .wav file that has been uploaded to the Management Portal:

1. Open the **Routing Strategy** module and click the **Resources** button to display the list of uploaded resources.
2. Click the  button to the left of the file name and select **Play**.




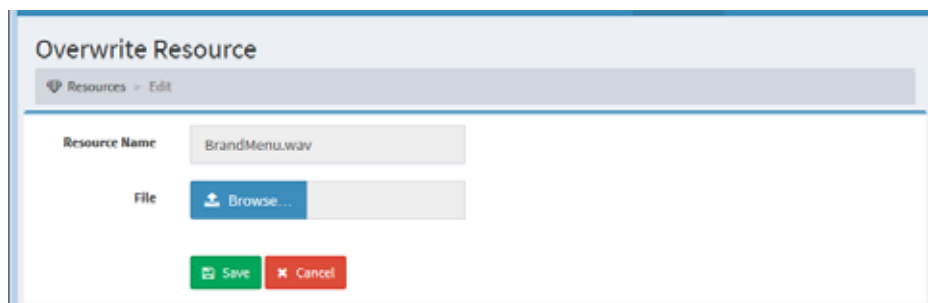
3. In the dialog box that opens, specify whether you want to open or save the file. When you click **Open**, the media player installed on your computer opens and plays the file. If a compatible media player is not installed, a dialog box opens and prompts you to download a player.

Updating a Resource File

It is strongly recommended that you do not update resources that are currently being used by the system.

To update a resource file:

1. Open the **Routing Strategy** module and click the **Resources** button to display the list of uploaded resources.
2. Click the  button to the left of the resource you want to update and select **Edit**.
3. On the page that appears, click the **Browse** button.



4. In the dialog box that opens, navigate to the file in your system and click **Open**.


The dialog box closes, the File field displays the path and file name of the uploaded file, and the Resource Name field displays the file name.

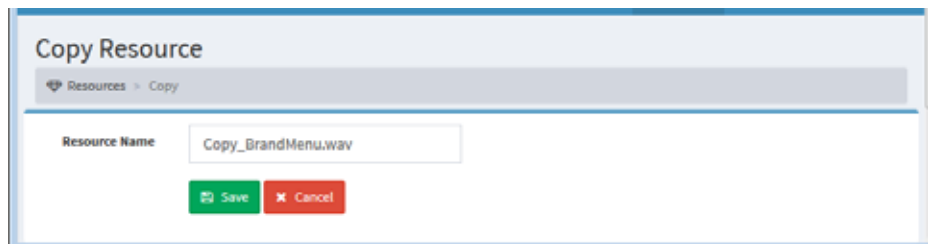
5. Click **Save** to overwrite the original resource with your changes.

Copying a Resource File

The copy function enables you to create backup copies of prompts and other resource files. Only files with the *.wav* extension can be copied.

To copy a resource file:


1. Open the **Routing Strategy** module and click the **Resources** button on the menu bar to display the list of uploaded resources.
2. Click the  button to the left of the resource you want to copy and select **Copy**.
3. On the page that appears, enter a name for the copied file or leave the default name (*Copy_* prepended to the original name), and click **Save** to upload the copy to the Management Portal.



Exporting the References to a Media File

You can view or export a list showing the name of each routing strategy that references a specified media file along with the name of the associated entry point or queue. In the case of a global routing strategy, the list shows **0** instead of the name of an entry point or queue.

To view or export the references to a media file:

1. Open the **Routing Strategy** module and click the **Resources** button to display the list of uploaded resource files.
2. Click the  button to the left of a listed *.wav* file and select **Excel** or **CSV**.
3. In the dialog box that opens, specify whether to open or save the file.

Viewing, Creating, Modifying, and Deleting Routing Strategies

For each entry point and queue, you should create a set of default routing strategies that cover all time intervals. In addition, you can schedule an alternate strategy beyond the default strategy for any time interval. For example, Queue 1 could have a `BusyHourStrategy` for the normal day shift and an `OffHoursStrategy` for non-business hours.

Note: You can create only one routing strategy for a proxy queue.

The normal daily schedule should be flagged as the default strategy. A non-default strategy, such as a holiday schedule, can then be created for a time interval that overlaps the default strategy. A strategy that is not flagged as default will override a default strategy and be used as an exception to the default schedule. This means that the system first checks for a strategy that is *not* flagged as default, and if none exists, the default strategy is used.

When the default strategy is the current strategy (that is, the strategy that is currently running), the system checks every three minutes for a non-default strategy and if one is found, it becomes the current strategy.

If no strategy is specified for a time interval, and there is no default strategy for the time interval, the last strategy used by the system may continue as the current strategy even though it has expired. In this case, the system checks every minute for a valid strategy and as soon as it finds one, that strategy becomes the current strategy.

Topics covered in this section:

- [Viewing Routing Strategies for an Entry Point or Queue](#)
- [Viewing a List of Currently Deployed Routing Strategies](#)
- [Viewing Global Routing Strategies](#)
- [Understanding Time Values in Routing Strategies](#)
- [Creating a Routing Strategy](#)
- [Assigning Call Control Scripts and Parameters](#)
- [Assigning Skill Requirements to Incoming Calls](#)
- [Specifying Call Distribution Settings](#)
- [Specifying Call Distribution for a Cross-ACD Entry Point](#)
- [Modifying a Routing Strategy](#)
- [Deleting and Restoring Routing Strategies](#)

Viewing Routing Strategies for an Entry Point or Queue

To view all routing strategies for an entry point or queue:

1. Open the **Routing Strategy** module.

The Routing Strategy page appears, displaying one of two possible views: calendar view or list view. Use the buttons beneath the menu bar on the right or left side of the page (depending on the width of your browser window) to switch between these two views.

2. Select an entry point or queue from the drop-down list to display the routing strategies for that entry point or queue.

The drop-down list is available from both the calendar view and list view. Icons in the drop-down list distinguish entry points from queues.

- ▶ entry point
- ▶ cross-ACD entry point
- ▶ outdial entry point
- ■ ■ queue
- ■ ■ proxy queue
- ■ ■ outdial queue

The list view is shown in the following illustration.

Click here to select an entry point or queue from the drop-down list.

Use these buttons to switch between the list view and calendar view.

Name	ID	Status	Default	Repetition	Start Date	Start Time	End Time	End Date
Current -EP_TranseraTest	12389287	Active	Yes	Daily	01-Nov-2016	0100	0100	01-Nov-2016
EP_NonDefault	12316946	Active	No	Daily	16-Dec-2015	0000	2400	16-Dec-2015
EP_TranseraTest	1457528	Active	Yes	Daily	31-Aug-2009	0100	2400	30-Dec-2028

Number	Destination	Type	Routing Strategies
1	Q_mccg_wcb	Entry Point	EP_TranseraTest
2	loadQ	Queue	EP_NonDefault

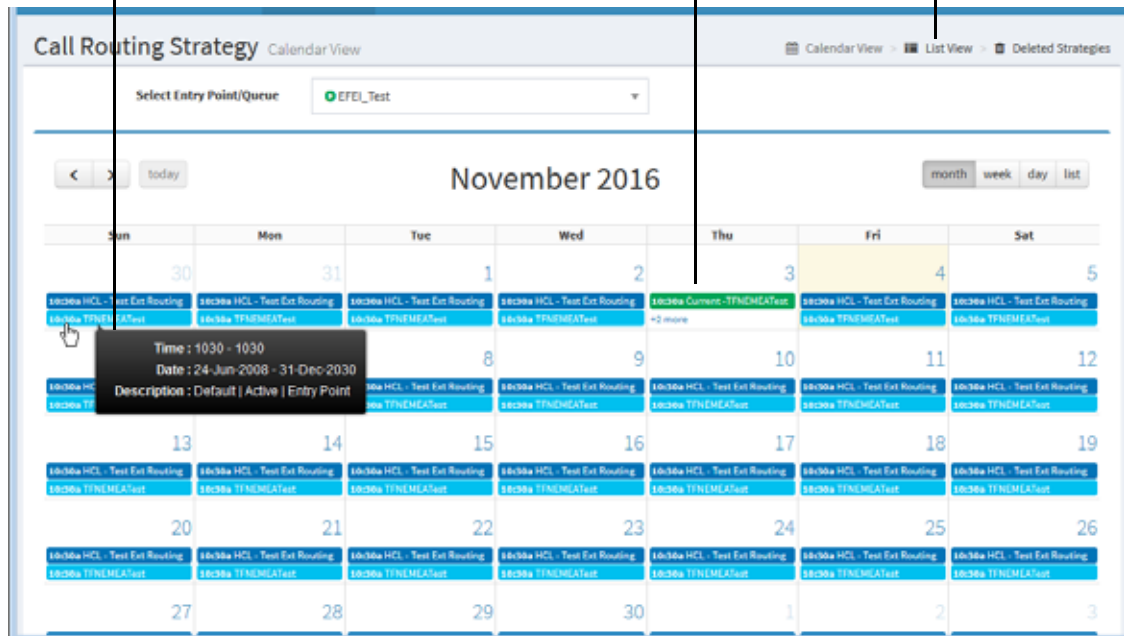
Calendar View

The calendar view displays strategies for each day of the month.

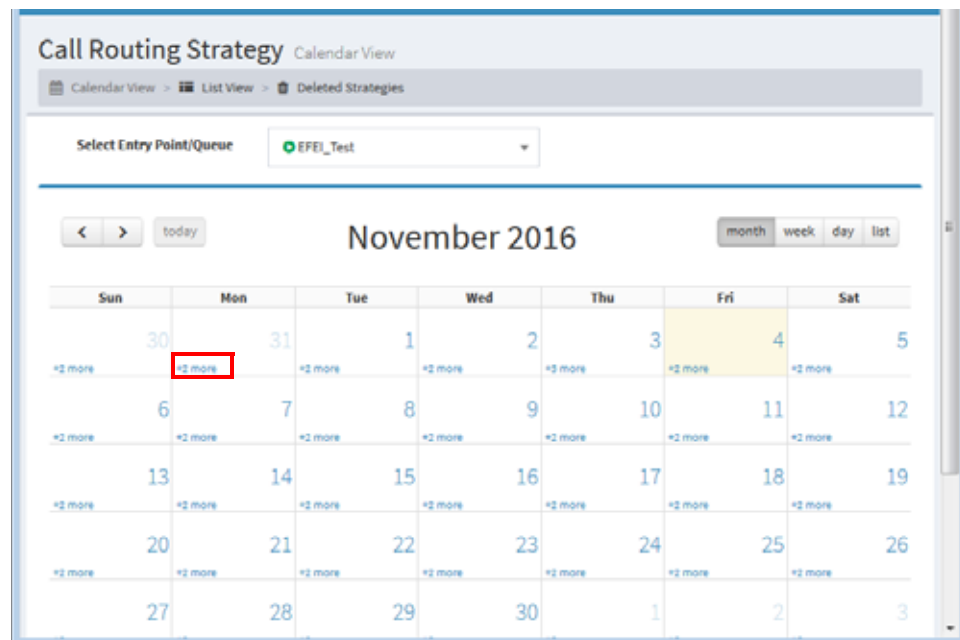
Point to a listed strategy to display a brief summary.

Current strategy for the selected entry point


Click this button to display the list view.




If your browser window is narrow, the calendar is displayed as shown in the following illustration. Click the link at the bottom of a date box to display a list of strategies for that day.



There are several ways to view data from the monthly calendar view:

- To display a brief description of a strategy, point to the strategy name.
- To view or edit the details for a strategy, click the strategy name.
- To create a new strategy, point to the start date for the strategy and click the + **Create** button that appears in the upper-left corner of the date box.
- To view previous or future months, click the left or right arrows located on the left side of the page above the calendar.
- To display a bar chart view of the schedule for a particular date, click the date.
- To display other calendar views, click one of the buttons on the right side of the page above the calendar: .

List View

The upper section of the list view displays a table listing all routing strategies available for the selected entry point or queue. To see details for a strategy, click the  button to the left of the strategy and select **Edit**.

The lower section of the page displays the *Routing Strategy Vteam Mapping Details* table:

- **For an entry point**, this table lists the destination queues and entry points based on the active routing strategies defined for the selected entry point.
- **If a queue is selected**, this table lists the teams to whom calls are being distributed based on the active routing strategies defined for the selected queue. Note that mapping details are not shown for a queue routing strategy that just redirects the call to another entry point or queue.

Note: The entities displayed in the Mapping Details table are based on your access rights. For example, if calls for the Sales queue are being distributed to Team A and Team B and you have access rights only to Team A, then the mapping table will only show Team A as the destination for calls coming into the Sales queue.

Click this button and select **Edit** to view settings for the strategy

The screenshot displays the 'Call Routing Strategy' List View page. At the top, there are navigation options: 'Calendar View', 'List View', and 'Deleted Strategies'. A dropdown menu for 'Select Entry Point/Queue' is set to 'Training'. A 'New Strategy' button is visible. The main table lists three strategies:

Name	ID	Status	Default	Repetition	Start Date	Start Time	End Time	End Date
Current - Training	7759246	Active	Yes	Daily	03-Nov-2016	1030	1030	03-Nov-2016
Testing Redirect Queue Percent Allocation	292211	Not Active	Yes	Daily	07-Dec-2007	1030	1030	31-Dec-2007
Training	110883	Active	Yes	Daily	16-Jan-2007	1030	1030	31-Dec-2007

Below the table, there are pagination controls: 'Showing 1 to 3 of 3 entries' and buttons for 'First', 'Previous', 'Next', and 'Last'. A 'Routing Strategy - Vteam Mapping Details' section is at the bottom, showing a table with columns 'No.', 'Team', and 'Routing Strategies':

No.	Team	Routing Strategies
1	T-BOC-TestTeam	Training
2	T-BOC-TestTeam1	Training
3	T-BOC-Training	Training

Following is a description of each column in the upper section of the list view page.

Column	Description
Name	The name assigned to the strategy when it was created. You cannot change the name after the strategy has been created.
ID	The identification number of the strategy. This number is automatically assigned by the system.
Status	<p>Indicates the status of the strategy.</p> <ul style="list-style-type: none"> Current means this is a snapshot of the currently running strategy. You cannot copy the current strategy, but you can modify any setting that does not affect execution time or date. Changes to the strategy do not affect the recurring scheduled version of the strategy. <p>IMPORTANT: You can delete the current strategy, but <i>do not delete it before creating a different strategy for the same time interval</i>. If you delete a strategy without having another one in place, the last strategy used by the system becomes the "default strategy" even though the times and dates specified have expired. If this occurs, either create a new strategy for the current time period, or copy the default strategy and correct the time settings.</p> <ul style="list-style-type: none"> Active means the strategy will become effective at the specified start time on the specified start date. This is the default status. Not Active means the strategy will not become effective regardless of the specified start time and date. This status lets you save a strategy for future use or as a draft to continue working on later.

Column	Description
Default	Indicates whether the strategy is the default. A strategy that is <i>not</i> flagged as the default overrides a default strategy and is used as an exception to the default schedule.
Repetition	Specifies whether the strategy is scheduled to be repeated daily or only on specific days of the week.
Start Date	The date the strategy is scheduled to start.
Start Time	The time the strategy is scheduled to start (in 24-hour format) for any given day in the specified date range.
End Time	The time the strategy is scheduled to end (in 24-hour format) for any given day in the specified date range.
End Date	The date the strategy is scheduled to end.

Viewing a List of Currently Deployed Routing Strategies

To view a list of currently deployed routing strategies for multiple entry points or queues:

1. In the **Routing Strategy** module, click the **Call Routing** button on the menu bar and select **Current Routing Strategies**.
2. In the **Filter** panel on the left side of page, select **Entry Point** or **Queue** from the **Display By** list
3. Select the entry points or queues you are interested in or select **All** to view current strategies for all entry points or queues, and then click **Apply**.

Details about the current routing strategies for the selected entry points or queues are listed in the table on the right side of the page. The table includes the columns described in “List View” beginning on page 84 plus a “Control Script” column that displays the names of the call control scripts associated with the listed entry points or queues.



Entry Point	Name	ID	Status	Default	Repetition	Start Date
EP_ccg_wcb	Current-OutDial_64_Bit	12389761	Active	Yes	Daily	25-Oct-2016
EP_CD1	Current-TFN_CD1	12386286	Active	No	Daily	25-Oct-2016
EP_CD2	Current-EP_CD2	12386290	Active	No	Daily	25-Oct-2016
EP_mccg_wcb	Current-EP_Outdial_Test	12389736	Active	Yes	Daily	25-Oct-2016
EP_Outdial_ccg	Current-EP_Outdial	12389742	Active	Yes	Daily	25-Oct-2016
EP_RRN_Default	Current-EP_RRN_Default MB	12386288	Active	Yes	Daily	25-Oct-2016
EP_TranseraTest	Current-EP_TranseraTest	12389287	Active	Yes	Daily	25-Oct-2016
Outdial4mCCG	Current-mCCG_outdial	12389754	Active	No	Daily	25-Oct-2016
Test1	Current-Test1	12391616	Active	Yes	Daily	25-Oct-2016
Test2	Current-Test2- Vendor Proxy only	12287255	Active	Yes	Daily	25-Oct-2016
Test3	Current-Load3_mCCG	12287235	Active	No	Daily	25-Oct-2016
Test4	Current-mCCG_Load4	12391281	Active	No	Daily	25-Oct-2016

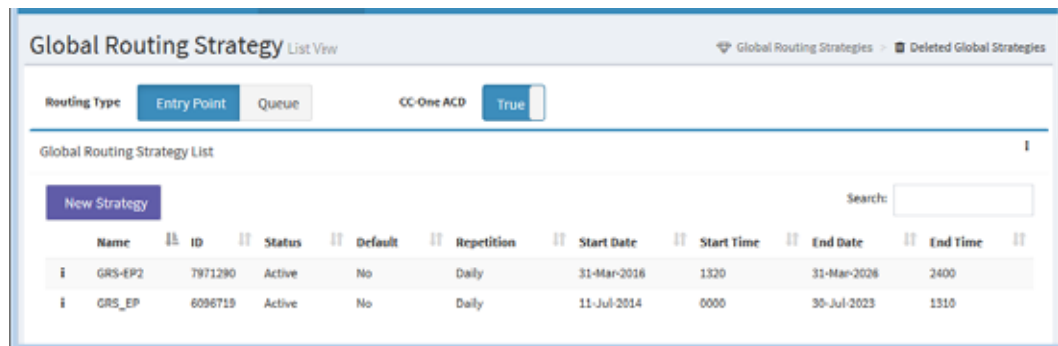
Viewing Global Routing Strategies



A global routing strategy can be associated with multiple entry points or queues. To view a list of global routing strategies:

1. In the **Routing Strategy** module, click the **Call Routing** button on the menu bar and select **Global Routing Strategies**.
2. In the **Routing Type** field, select **Entry Point** or **Queue**. To display cross-ACD entry points or proxy queues, set the **CC-One ACD** field to **False**.

The page displays a list of all global routing strategies available for the selected entry point or queue. For a description of each column in the list, see the table beginning on [page 85](#).

3. To export the data displayed in the table to a data analysis tool, click the  button on the right side of the page and select **Excel** or **CSV**.
4. To display details for a specific strategy, click the  button to the left of a listed strategy and select **Edit**.



	Name	ID	Status	Default	Repetition	Start Date	Start Time	End Date	End Time
	GRS-EP2	7971290	Active	No	Daily	31-Mar-2016	1320	31-Mar-2026	2400
	GRS_EP	6096719	Active	No	Daily	11-Jul-2014	0000	30-Jul-2023	1310

For more information, see [“About Global Routing Strategies”](#) on [page 58](#). For how to create a global routing strategy, see [“Creating a Routing Strategy”](#) on [page 89](#).

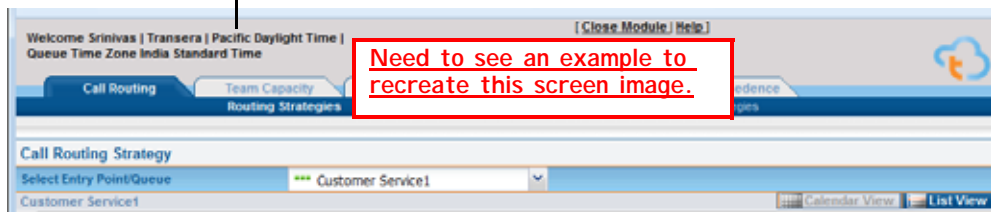
Understanding Time Values in Routing Strategies

Note: The Multiple Time Zone feature is not available in the CC-One Salesforce Edition.

If the Multiple Time Zone feature is enabled for your enterprise, entry points and queues can be provisioned with time zones. In this case, time values in routing strategies are based on the time zone provisioned for the entry point or queue or, if no time zone is specified, the time zone provisioned for your enterprise (typically headquarters).

If an entry point or queue is provisioned with a time zone, the time zone is displayed at the top of the routing strategy page to the right of or below the enterprise time zone as shown in the following illustration.



The time zone for the selected queue or entry point is displayed here.

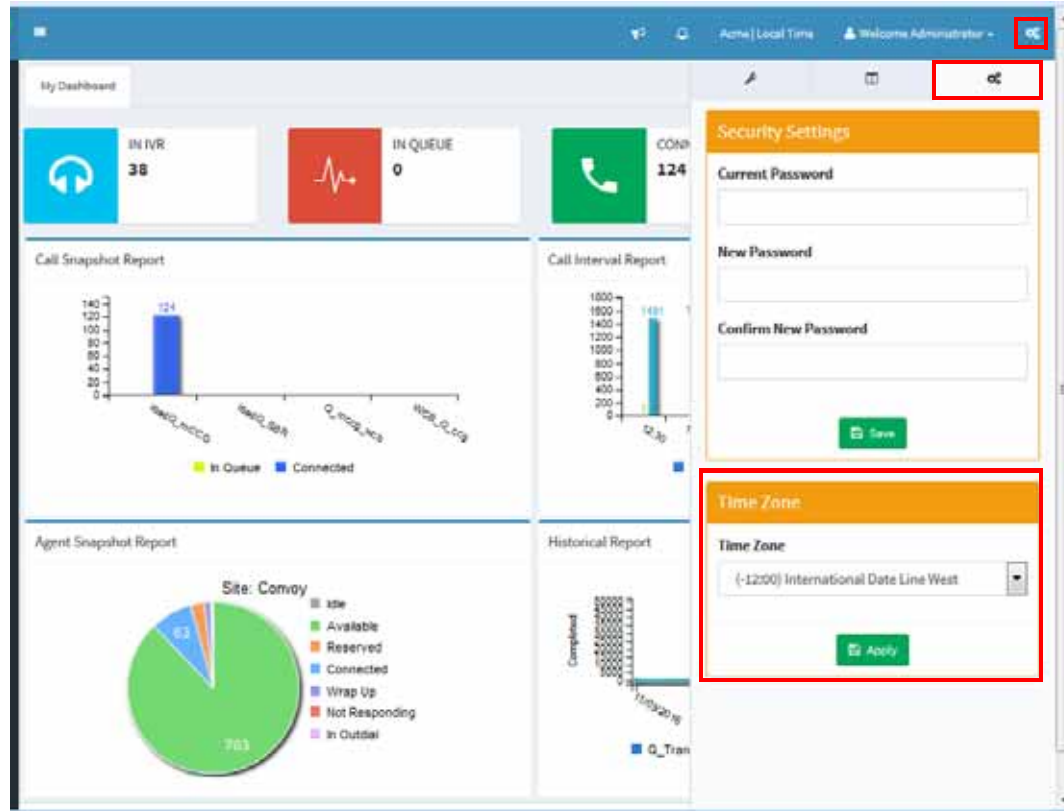


If the Multiple Time Zone feature is not enabled for your enterprise, time values in routing strategies are based on the time zone provisioned for your enterprise.

If the time zone observes daylight saving time, the time is adjusted automatically when daylight saving time changes.

You can display routing strategies in your preferred time zone as follows:

1. Click the gears  icon in the upper-right corner of the Portal landing page to display the three-tabbed settings panel.
2. Click the tab displaying the gears  icon, and under **Time Zone**, select a time zone from the **Time Zone** drop-down list and click **Apply**.



Creating a Routing Strategy


Keep the following guidelines in mind when creating a routing strategy for an entry point or queue:

- Be sure to create an active strategy for every time interval. If no active strategy is specified for a time interval, the default will be used. If there is no default strategy, the last strategy used by the system may continue as the current strategy even though it has expired.
- An easy way to create a new strategy is to make a copy of an existing one, select the entry points or queues you want to associate it with, and change the appropriate settings if necessary, including the name if another routing strategy with the same name exists for a selected entry point or queue.
- The system does not allow you to save an active strategy if the scheduled dates or times conflict with an existing active strategy.

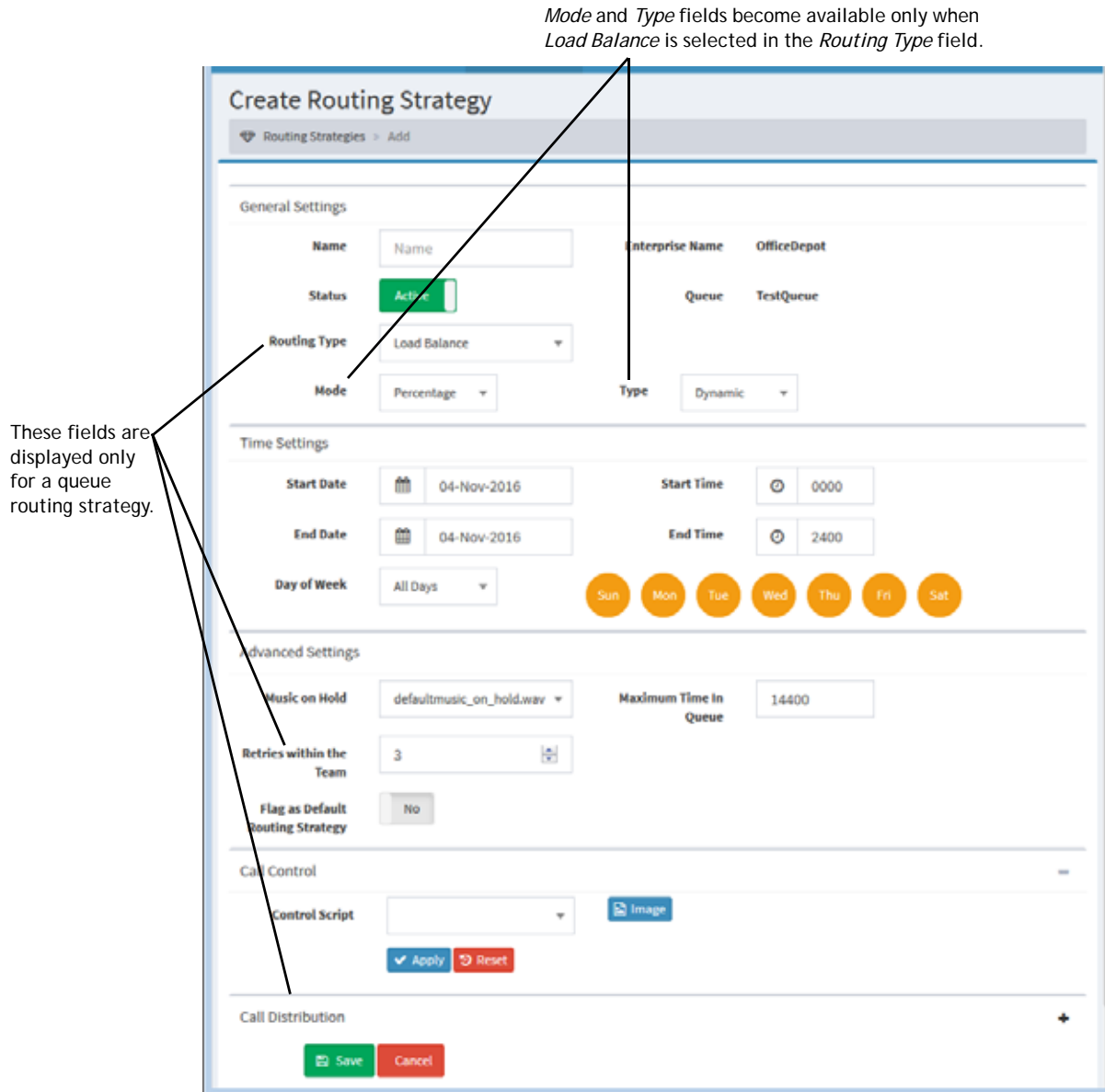
Notes:

- You can create four types of routing strategies for standard CC-One queues: *Longest Available Agent*, *Load Balance*, *Priority Based*, and *Skills Based* (if your enterprise is provisioned with the optional Skills-Based Routing feature). To learn how each routing type could be implemented in a call center, see “[Routing Strategy Examples](#)” on page 125.
 - You can create only one routing strategy for a proxy queue.
-

To create a routing strategy:

1. Open the **Routing Strategy** module.
2. Do one of the following:
 - On the Call Routing Strategy page that appears, make a selection from the **Select Entry Point/Queue** drop-down list.
- OR -
 - To create a global routing strategy, click the **Call Routing** button on the menu bar, select **Global Routing Strategies**, and select the **Entry Point** or **Queue** button on the upper-left side of the page.
If you are creating a global routing strategy for cross-ACD entry points or for proxy queues, set the **CC-One ACD** field to **False**.
3. Do one of the following from the list view:
 - Click the **New Strategy** button.
- OR -
 - Click the  button to the left of a listed strategy and select **Copy**.
4. Enter or modify the settings as described in the following table and then click **Save**.


In the following table, asterisks (*) mark settings that are available only for standard [CC-One](#) queue routing strategies.



Setting	Description
General Settings	
Strategy Name	Enter a descriptive name for the strategy, such as <i>US Holiday</i> or <i>Weekends</i> . You cannot edit this field after the strategy has been saved.
Status	Select Active if you want the strategy to become effective on the start date you specify in the <i>Start Date</i> field. Select Not Active if you want to save the strategy for future use or as a draft to continue working on later.
Entry Points/Queues	This field appears only if you are copying a routing strategy or adding a global routing strategy. Select the entry points or queues that will be associated with this routing strategy.

Setting	Description
Routing Type*	<p>If this is a queue strategy, select a routing type (this setting is not available for proxy queues):</p> <ul style="list-style-type: none"> • Longest Available Agent. Calls are routed to the agent who has been available for the longest time over all teams assigned to the strategy in the Call Distribution section. • Load Balance. Calls are routed to agents based on load-balancing conditions that you set in the Mode and Type fields and in the settings specified in the Call Distribution section. • Priority Based. Calls are routed to agent teams based on a priority scheme that you set in the Call Distribution section. • Skills Based. Calls are routed to agents based on skill requirements specified in the Call Distribution section of the routing strategy for the entry point that sends calls to this queue. The Skills Based routing type is available only if your enterprise is provisioned with the optional Skills-Based Routing feature. <p>When you select <i>Skills Based</i> as the routing type, two additional settings appear for you to specify how to route a call when more than one agent with the required skill set is available:</p> <ul style="list-style-type: none"> – Longest Available Agent. The call will be routed to the agent who has been available the longest. – Best Available Agent. When you select this setting, a Skill drop-down list appears. The call will be routed to the agent with the highest proficiency in the skill you select in the drop-down list.
Mode*	<p>If you specified <i>Load Balance</i> in the <i>Routing Type</i> field, select one of the following values to specify how the call load will be handled:</p> <ul style="list-style-type: none"> • Percentage. Calls are routed to selected teams based on a percentage allocation that you specify for each team in the Call Distribution section. The percentage spread total must equal 100 across all teams selected for Group 1. See “Specifying Call Distribution Settings” on page 101 for more information. • Number. Calls are routed to selected teams based on the value you specify for each team in the Call Distribution section. This value reflects the call capacity for that team. After the specified number of calls are sent to a particular team, no additional calls will be sent to that team. In other words, this strategy allows you to specify an upper limit on the total number of calls that are sent to a particular team. This allows you to meet any contractual obligations to not exceed certain targets.

Setting	Description
Type*	<p>If you specified <i>Load Balance</i> in the <i>Routing Type</i> field, select one of the following values in the Type field:</p> <ul style="list-style-type: none"> • Dynamic. Calls routed dynamically result in a single virtual queue. Callers queue for the longest available agent across all associated teams instead of being allocated immediately at the time of call arrival to a team specified in the load balance strategy (based on current call conditions). • Static. Calls are routed to specific teams on the basis of a predefined percentage or numeric allocation at the time of call arrival. In static routing, calls are assigned to a team based on the number of calls specified for that team in the Call Distribution section (either a percentage or number of calls). In dynamic routing, calls are assigned to a team based on the current allocation of calls among the teams based on the day's tally.
Time Settings (these are read-only for proxy queues)	
Start Date End Date	Click in each of these fields and use the calendar controls to specify the start date (the date the strategy will become effective) and end date (the date the strategy will expire).
Execution Start Time of Day Execution End Time of Day	Enter in 24-hour format (0000 to 2400) the time of day you want the strategy to start and end.
Day of Week	<p>From the drop-down list, select All Days if you want to schedule the strategy for every day or Weekdays if you want to schedule the strategy for Monday through Friday only.</p> <p>-OR-</p> <p>Select each icon that represents a day on which you want to schedule the strategy.</p>
Advanced Settings (not applicable to proxy queues)	
Music on Hold	Select the name of the audio (.wav) file to play for calls when they arrive or are waiting in queue. For more information, see "Audio on Hold" on page 146 .
Maximum Time in Queue*	<p>If this is a standard CC-One queue routing strategy, enter the length of time, in seconds, after which a queued call should be distributed to the overflow destination number provisioned for the queue. BroadSoft recommends setting this to 1800 (30 minutes) or to three times the average queue length during busy hours.</p> <p>If this is an email routing strategy, set this to a very high value to avoid overflow.</p> <p>By default, this field is set to the value provisioned for the queue.</p> <p>IMPORTANT: The cumulative total queue time specified for all groups in the Call Distribution section of the routing strategy should not be greater than the value specified here. See "Specifying Call Distribution Settings" on page 101 for more information.</p>

Setting	Description
Retries within the Team*	<p>If this is a standard CC-One queue routing strategy, specify the maximum number of times an attempt will be made to send a call to a team before the call is routed to the next available team. No further attempts will be made to send the call to that team again.</p> <p>Exceptions:</p> <ul style="list-style-type: none"> This setting does not apply to skills-based routing strategies. For skills-based routing, if the call is in the last group, the call overflows if no matching agent is found. If the call is in any other group, and if it is sent to an agent who does not answer, the system will continue to try other matching available agents any number of times, without regard to this setting. In a load balance strategy using percentage allocation, a call is not distributed to a second team when the first team is unavailable. Instead, the system retries the first team's DN for the number of times specified for the strategy and then overflows the call.
Flag as Default Routing Strategy -or- Update as Default Routing Strategy	<p>This setting is available only if you are creating a new strategy or copying an existing one.</p> <p>Set to Yes if you want this to be the default routing strategy for the specified time interval for this entry point or queue.</p> <p>Set to No if you are creating an exception to the default schedule, such as a holiday. A strategy that is <i>not</i> flagged as default overrides the default strategy. That is, the system first checks for a strategy that is <i>not</i> flagged as default, and if none exists, the default strategy is used.</p>
Call Control	
<p>Select a call control script from the drop-down list. Every strategy must have a control script associated with it, which defines how calls are handled. If appropriate, change the script's default parameters in the fields displayed. For more information, see the next section, "Assigning Call Control Scripts and Parameters."</p> <p> Caution: If you are editing an existing strategy, selecting a different call control script can significantly change how calls are handled. It is important that you are clear on what you want to do before changing scripts or script parameters.</p> <p>If this is an entry point strategy for skills-based routing, assign skills requirements as described in "Assigning Skill Requirements to Incoming Calls" on page 98.</p>	

Setting	Description
Call Distribution* (not applicable to proxy queues)	
<p>If this is a standard CC-One queue routing strategy, specify which teams you want to associate with this strategy and organize them into groups. See “Specifying Call Distribution Settings” on page 101 for details. In addition, do the following (as described in “Assigning Teams and Skill-Relaxation Settings to Groups” beginning on page 102):</p> <ul style="list-style-type: none"> • If the routing type is <i>Load Balance</i>, assign percentage spreads or capacities to each team in Group 1. You can add additional groups, but you cannot assign percentage spreads or capacities to the teams in those additional groups. • If the routing type is <i>Priority</i>, assign priorities. Note that a specific priority can be assigned to only one team within the strategy (for example, only one team can have a priority of 1 assigned to it). • If the routing type is <i>Skills Based</i>, specify skill relaxation settings if appropriate. <p>If this is a routing strategy for an outdial queue, you must specify a team in the Call Distribution section. The specified team is only a placeholder and will not be used. In addition, be sure to create only one group for an outdial queue routing strategy.</p>	
Business Metrics & Queue Escalation (applicable only to cross-ACD entry points)	
<p>If this routing strategy is for a cross-ACD entry point, organize the queues that will be served by the entry point into one or more groups and specify the call routing algorithm and applicable parameters as described in “Specifying Call Distribution for a Cross-ACD Entry Point” on page 108.</p>	

Assigning Call Control Scripts and Parameters

Call control scripts define how a call is handled. If a control script is not assigned to a routing strategy, the default control script provisioned for the entry point or queue is used.

The Call Control settings for a routing strategy allow you to assign a control script to the routing strategy and set values for configurable parameters if any are specified in the control script.

If your enterprise uses the optional Skills-Based Routing feature, the Call Control settings for an entry point strategy can also include controls for specifying skill requirements for calls that arrive at the entry point, as described in [“Assigning Skill Requirements to Incoming Calls” on page 98](#).


Note the following:

- Before you can assign a custom control script, it must be uploaded to the CC-One system (see [“Uploading a Custom Control Script” on page 74](#)).
- After a control script is available for selection, it can be assigned to new or existing routing strategies.
- If a control script is modified after being assigned to a routing strategy, it must subsequently be reassigned to the routing strategy. For more information, see [“Copying or Modifying a Call Control Script” on page 73](#) and [“Updating a Custom Control Script” on page 75](#).



Caution: Assigning a different control script to an existing routing strategy can significantly change how calls are handled. Be sure that you are clear on what you want to do before changing a control script or control script parameters.

To assign a control script and control script parameters to a routing strategy:

1. Open the **Routing Strategy** module and on the Call Routing Strategy page, display the list view.
2. Select an entry point or queue from the **Select Entry Point/Queue** drop-down list.
3. Do one of the following:
 - To create a new strategy, follow the instructions in [“Creating a Routing Strategy” on page 89](#), and then return to this procedure for instructions on assigning a control script to the strategy.
 - To assign a control script to an existing strategy do one of the following: from the list view, click the  button to the left of the listed strategy you want to modify and select **Edit**; or, from the calendar view, click the link to the strategy.

- In the **Call Control** section of the page, make a selection from the **Control Script** drop-down list. If an image associated with the control script is available, you can click the **Image** link to the right of the Control Script drop-down list to display it.

The configurable parameters for your selection are displayed beneath the control script name. You must set a value for every parameter.

If any call-associated data (CAD) variables are specified in the selected control script, their names are displayed in the **Call-Associated Data** list on the right side of the Call Control section. The system will capture data for a CAD variable as part of the call record only if it matches the name of a non-deprecated CAD variable provisioned for your enterprise.

Note: Provisioned CAD variables are not currently available in the CC-One Salesforce Edition. Contact BroadSoft Professional Services if you need this functionality.

The color of a CAD variable name indicates the status of the variable.

Color	Variable Status
Green	A matching non-deprecated variable exists.
Red	A deprecated matching variable exists; the system does not store data for deprecated variables.
Black	No matching variable exists; thus no data will be stored for the variable.

If an image of the control script is available, you can display it by clicking this link.

The names of CAD variables specified in the control script are displayed here.

Call Control

Control Script: ForCADVariables.js (Image)

WelcomeMediaFile: BrandMenu5.php (mediaFile, A valid media file.)

MenuPrompt: Menu.wav (mediaFile, A valid media file.)

Sales: AAA-EPP (vteam, A valid VTeam.)

OrderStat: AAA-EPP (vteam, A valid VTeam.)

Catalog: AAA-EPP (vteam, A valid VTeam.)

AcctPay: AAA-EPP (vteam, A valid VTeam.)

CusSvc: AAA-EPP (vteam, A valid VTeam.)

Call-Associated Data

CAD1

Menu

Apply Reset

Save Cancel

5. Specify a value for each parameter. To reset the parameter fields to the default values, click the **Reset** button beneath the parameter fields.

Note: Parameters for a proxy queue include site and team. For these parameters, you must select a dummy site and dummy team that is not agent-based.

[<VERIFY--APPEARS TO BE NOT TRUE--Sent question to Suresh>](#)

6. If the control script uses skills-based routing, a **Manage** button is displayed to the right of the Reset button. For details about adding skill requirements to a routing strategy, see “Assigning Skill Requirements to Incoming Calls” on page 98.
7. Click **Apply** to apply your control script and parameter settings.
8. To save your settings to the routing strategy, click **Save**.

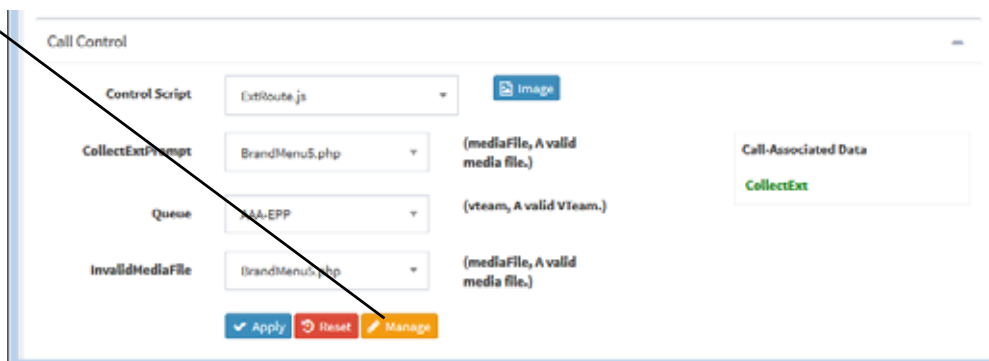
Assigning Skill Requirements to Incoming Calls

Skills-based routing is an optional CC-One feature that matches the needs of callers with agents who have the skills to best meet those needs. When calls arrive at an entry point, they are assigned skill requirements based on call paths specified in the call control script associated with the routing strategy for the entry point. The calls are then distributed to the specified queue for distribution to agents who possess a matching set of skills.

To assign skill requirements to incoming calls:

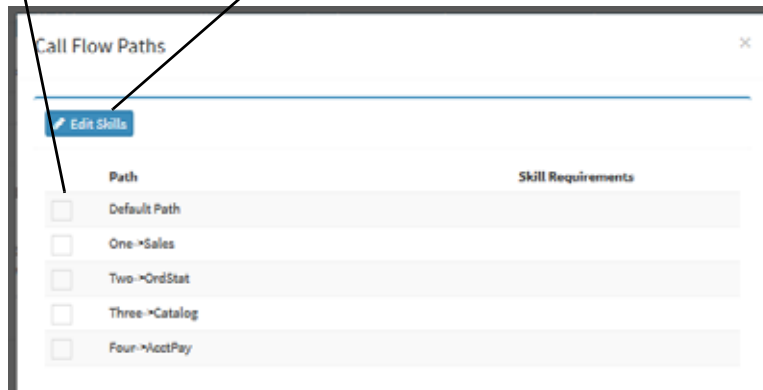
1. Display the routing strategy page for the entry point to which you want to assign or modify skill requirements.
2. In the **Call Control** section of the page, select the appropriate call control script and set any parameters as described in “Assigning Call Control Scripts and Parameters” on page 96.
3. Click the **Manage** button to display the **Call Flow Paths** window.

Click this button to display controls for specifying skill requirements.



- Click the check box to the left of a call path for which you want to assign skills, and then click the **Edit Skills** button.

Select a path... and then click **Edit Skills**

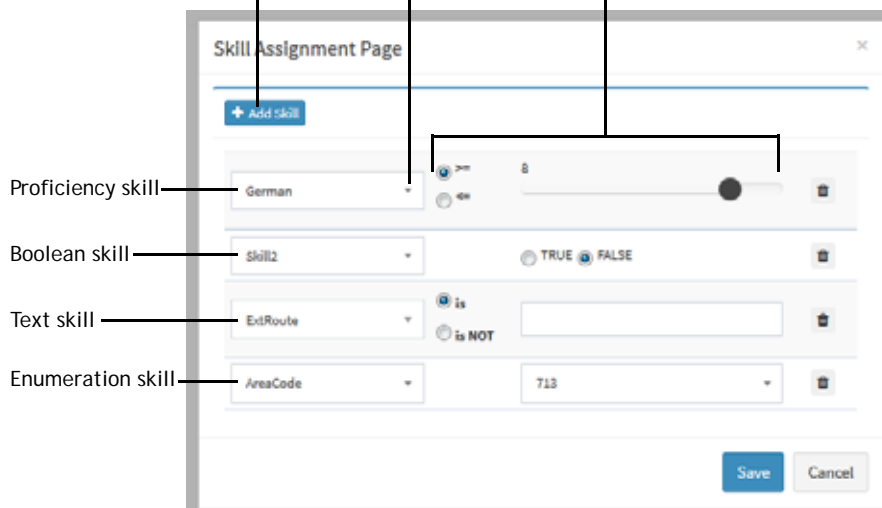


- On the **Skill Assignment Page** that appears, click the **Add Skill** button, then select a skill from the drop-down list, and then use the controls that are displayed to the right of the skill name to specify a value for the skill.


The controls for assigning a value to the skill vary depending on the skill type. The four skill types are shown in the following illustration and described in the table that follows. (For more information about skill types, see [“About Skills-Based Routing”](#) on page 51.)

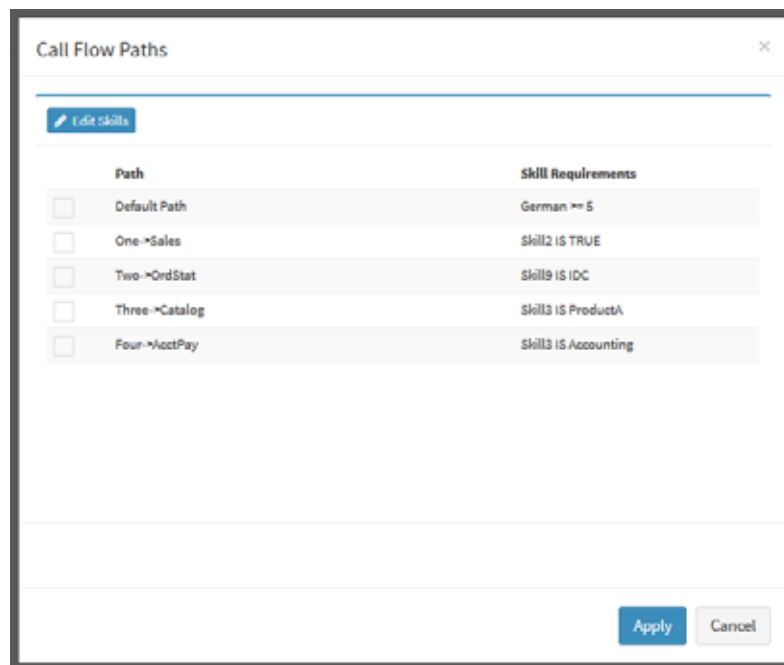
Note: Skill requirements specified for the **Default** path will be used for any path that does not have skill requirements assigned to it.

Click this button ... Then select a skill ... Then use the controls displayed here to specify a value for the skill



Skill Type	Description
Proficiency	Select the >= (greater than or equal to) button or the <= (less than or equal to) button, and then drag the slider to the right or left to assign a value between 0 (lowest) and 10 (highest) that represents the required level of expertise in the skill. In the example, a proficiency in German of 8 or greater is required.
Boolean	Select True or False to indicate whether the agent handling the call is required to have or required not to have this skill.
Text	Enter a value in the text box and select the is or is NOT button to indicate whether the agent handling the call must have or must not have a matching value. For example, you could create a skill named <i>Extension</i> and assign each agent the Extension skill with a numerical value representing that agent's extension number.
Enumeration	Select a value from the drop-down list.

6. To add another skill requirement for the selected path, repeat the previous step. To delete a skill requirement mapping, click the Delete  button to the right of the setting for that skill.
7. When you are finished adding skill requirements for the selected path, click the **Save** button to save your changes and close the **Skills Assignment Page**.
8. To add skill requirements for another path, start again at step 4.
9. When you are finished, click the **Apply** button at the bottom of the **Call Flow Paths** window.



10. To save your settings to the routing strategy, click **Save**.

Specifying Call Distribution Settings

Call Distribution settings determine which teams receive calls, and in what order. These settings are available in the Call Distribution section of the routing strategy for a standard **CC-One** queue, enabling you to assign teams to groups, which are assigned a priority based on the order in which they are created.

You assign a queue time to Group 2 and each subsequent group. When a call comes in, the teams in Group 1 become available first. If the call is not handled within the queue time specified for Group 2, the teams in Group 2 also become available. Teams in Group 2 and later serve as *escalation* groups; that is, their availability to handle overflow from Group 1 teams can considerably reduce the amount of time calls wait in queue.

In the case of priority-based routing, you assign a priority to each team in each group. Note that priorities are assigned across groups. Suppose, for example, that Group 1 has two teams with priorities 1 and 4, and Group 2 has two teams with priorities 2 and 3. In this scenario, the system would try to send the call to team1, then to team4. If the call has not been answered within the queue time specified for Group 2, the teams in Group 2 become available to handle the call, and the system will try the four teams based on their team priorities across the two groups.

If a team is assigned to groups in the routing strategies for more than one queue, the system routes a call to that team based on whichever queue (1) has that team earliest in its priority-based routing strategy and (2) has had a call waiting in queue the longest. Optionally, you can use the queue precedence function to assign the order in which calls are routed from queues to teams on a per team basis as described in [“Specifying Queue Precedence”](#) on page 145.

If your enterprise uses the optional Skills-Based Routing feature, you can use settings in the Call Distribution section to relax or remove skill requirements after specified time intervals.

Note: In a routing strategy for an outdial queue, you must specify a team in the Call Distribution section; this is only a placeholder and will not be used. In addition, you should specify only one group for an outdial queue routing strategy.

Topics covered in this section:

- [About Team Types](#)
- [Assigning Teams and Skill-Relaxation Settings to Groups](#)
- [Editing a Group of Teams or Skill Relaxation Settings](#)
- [Deleting a Group of Teams or Skill Relaxation Settings](#)

About Team Types

Two team types can be displayed in the Team Type column of the Call Distribution table when you create or modify a queue routing strategy: agent based and capacity based.

- **Agent-based** teams have a known number of agents assigned to them. Agents are set up and assigned to one or more teams in the Provisioning module or, for the CC-One Salesforce Edition, in the Call Center Admin interface. These agents use the CC-One Agent Desktop to interface with the CC-One system.
- **Capacity-based** teams do not have specific agents assigned to them, and the agents do not use the CC-One Agent Desktop. For example, an outsourcer might have teams that use a PBX or an ACD to handle calls. A capacity-based team might be used to represent a voice mailbox or an agent group that is not managed by the CC-One system.

The capacity of these teams is based on the provisioned team capacity setting, which can be overwritten by team capacity strategies (see [“Scheduling Team Capacity” on page 140](#)). If the team’s actual capacity is higher than the value currently being used by the system, agents could be left with no calls to handle, and vice versa, making strategy design more challenging.

You can mix team types when creating a routing strategy, but remember that the accuracy of call routing to capacity-based teams depends on the accuracy of the capacity number specified.

Note: If a static load balancing strategy includes both agent-based and capacity-based teams, calls will not be distributed to agent-based teams if the capacity for the capacity-based teams has been exhausted.

Assigning Teams and Skill-Relaxation Settings to Groups

When you create a routing strategy for a queue, you must create a minimum of one group of teams; there is no maximum. The required settings for a group vary depending on the type of routing strategy the group is created for.

Note: Be sure to create only one group for an outdial queue routing strategy.

If you are creating a group for a *skills based* routing strategy, you can specify skill-relaxation settings for the second and each subsequent group. Groups that specify skill-relaxation settings can include added teams but are not required to.

Skill-relaxation settings allow you to reduce or remove skill requirements assigned to a call in response to excessive customer wait times, thus expanding the pool of agents available to serve the customer.

To create a group:

1. From the **Create Routing Strategy** or **Edit Routing Strategy** page, go to the **Call Distribution** section of the page and click the **Add Group** button.
2. In the Add Call Distribution Group dialog box that opens, select the check box next to each team you want to include in the first group. You must select at least one team.

Note: If the status of a team (displayed in the *Status* column) is *Not Available*, calls will not be distributed to that team until it becomes available. The system allows you to add such a team to a group for planning purposes. For example, you might want to create a routing strategy for future use.

3. If you are creating a group for a *load balance* strategy, do one of the following:
 - If the specified call distribution mode is *Percentage*, specify the percentage spread among the teams. The spread must total 100.
 - If the mode is *Number*, enter the number of calls to be routed to each team.

This is a requirement only for Group 1. You do not specify a percentage spread or number for any additional groups.

4. If you are creating a group for a *priority-based* strategy, assign a priority to each team in each group by making selections from the drop-down list in the **Priority** column. Note that priorities are assigned across groups.
5. Click **Save Group** to save the group.

After the group is successfully saved, the settings in the dialog box are cleared you can create an additional group.

6. To create a second group, select the team or teams you want to serve as overflow teams in the event that the Group 1 teams are all busy, and select where to position the group in the call distribution sequence by selecting a value from the **Add Group As** drop-down. Specify the queue time as described in step 8 and any additional information as required by the type of strategy you are creating or editing.

For a *skills based* strategy, adding a team to the second and subsequent groups is optional.

Select where to position a second or subsequent group in the call distribution sequence.

Specify queue time here.

Team Name	Site Name	Status	Team Type
ACDTEAM	HCL	In Service	Agent Based
ACSTEAM	ACS	In Service	Agent Based
ass_team	ass	In Service	Agent Based
BCSTEAM	BCS	In Service	Agent Based
BLRTEAM	Bangalore	In Service	Agent Based
BSFT_TEAM	BSFT	In Service	Agent Based
CAPACITY_TEAM	HCL	In Service	Capacity Based
CAPTEAM	Bangalore	In Service	Capacity Based
Cessna_Team	Cessna_Site	In Service	Agent Based
Chowdary_Team	Chowdary	In Service	Agent Based

Showing 11 to 20 of 1,222 entries


Alter: 60 seconds in queue

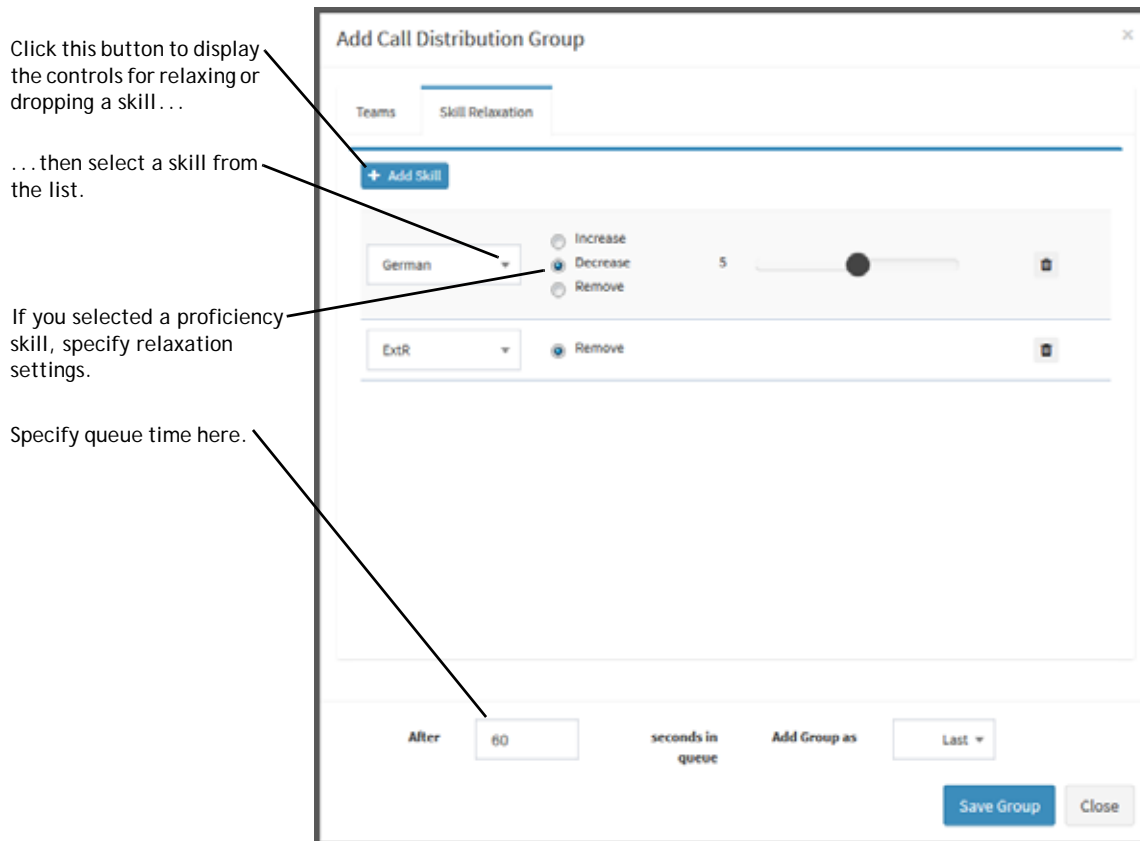
Add Group as: Last

Buttons: Save Group, Close

7. If you are creating a group for a *skills based* strategy, you can specify skill-relaxation settings to remove or reduce some or all of the skill requirements assigned to the calls after a specified queue time. To do so, you must know exactly which skill requirements were assigned to the calls in the routing strategy for the entry point that sends calls to this queue (see “[Assigning Skill Requirements to Incoming Calls](#)” on page 98 and “[Skills-Based Routing Example](#)” on page 135).

To specify skill-relaxation settings:



- Click the **Skill Relaxation** tab at the top of the Add Call Distribution Group page and then click the **Add Skill** button. You can click this button multiple times to display relaxation settings for multiple skills.
To delete a displayed setting, click Delete  button to the right of the setting.
- Select a skill from the drop-down list.
- If you selected a proficiency skill, select an option to indicate whether you want to increase, decrease, or remove the skill. If you selected **Increase** or **Decrease**, drag the slider to change the skill-level setting.
- Specify queue time as described in the next step.

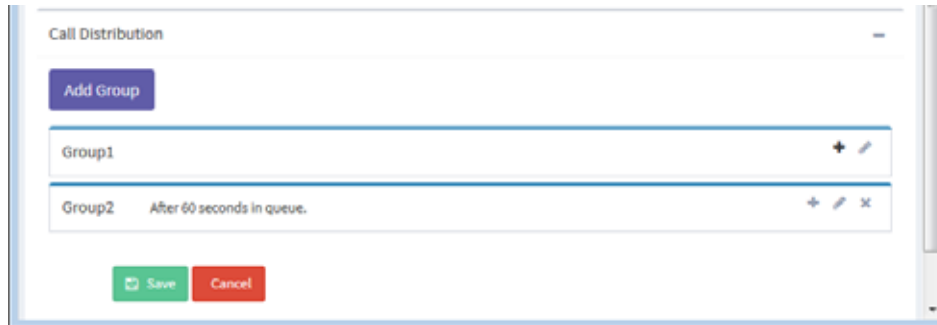


8. Specify the queue time, in seconds. Queue time is the amount of time that calls in the previous group will remain in queue before teams in the next group become available to handle them or until skills are relaxed or removed as specified in the Skill Relaxation tab. Only Group 2 and subsequent groups require a queue time.

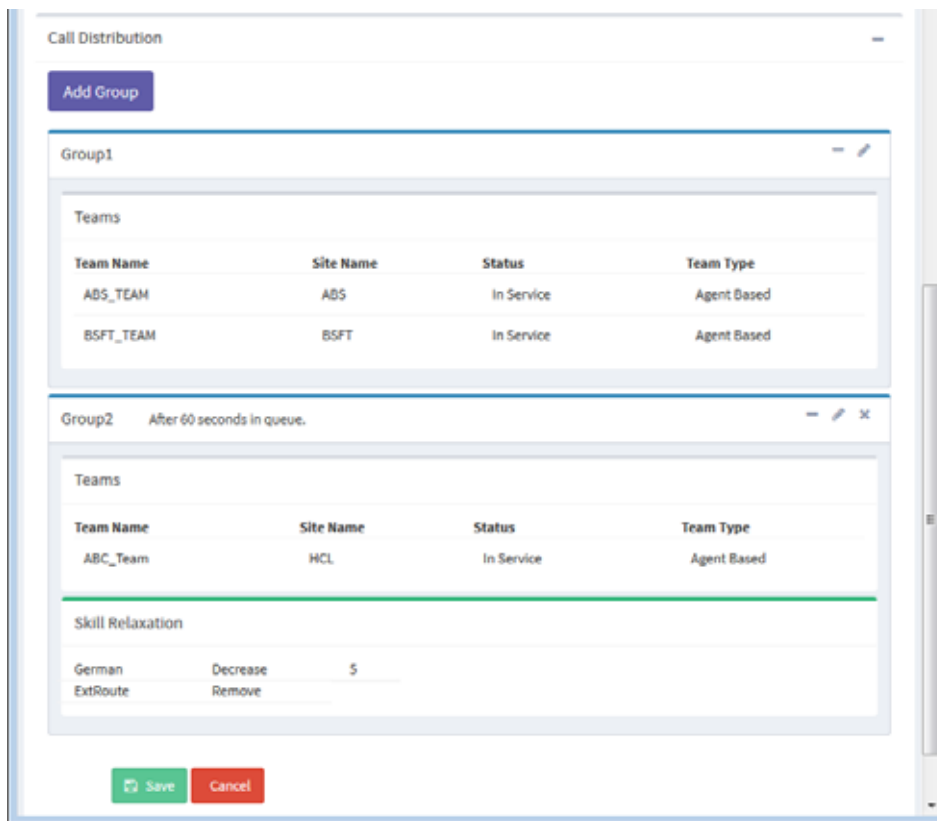
Note: Keep in mind that calls are directed to the overflow number after reaching the timeout value specified in the Maximum Time in Queue field. Therefore, it is important that you adjust that timeout value so that it is greater than or equal to the total queue time (that is, the cumulative queue times for all groups in the routing strategy).

9. Click **Save Group**.
10. To create another group, start again at step 6.

11. After you have created all the groups you want, click **Close**. The Call Distribution section displays a Group header for each added group. Each header displays two or three buttons on the right side:
 - Click **+** to expand a group section so you can see the settings for the group.
 - Click  to open a dialog box where you can edit the group's settings.
 - Click  to delete the group. This button is not displayed on Group 1 because the strategy must have at least one group.



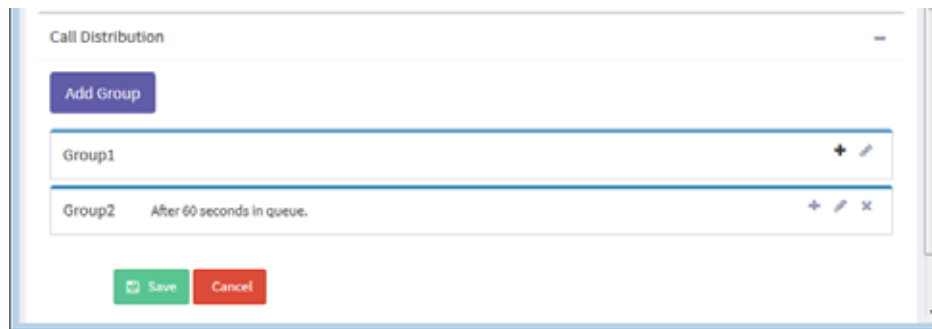
The following illustration shows the Call Control sections expanded. In this example, after calls sent to Group 1 have been in the queue for 60 seconds (the queue time specified), skills are relaxed or removed and the team in Group2 also becomes available to handle the calls.



Editing a Group of Teams or Skill Relaxation Settings

To edit a group:

1. Display the Edit Routing Strategy page for the relevant routing strategy (see [“Modifying a Routing Strategy”](#) on page 120).
2. In the **Call Distribution** section, do one of the following:
 - Click the Delete **X** button on the right side of the header for the group to delete the group. This button is not displayed on Group 1 because you cannot delete the first group.
 - Click the Edit **✎** button to open the Edit Call Distribution Group dialog box where you can edit the group’s settings.
 - Click the **Add Group** button at the top of the Call Distribution section to create a new group, as described in [“Assigning Teams and Skill-Relaxation Settings to Groups”](#) on page 102.




3. If you are editing a group, the Edit dialog box displays all teams available for selection as well as the teams that are currently selected for the group. You can select different teams or change the queue time.

If you are editing a group for a skill based strategy, click the **Skill Relaxation** tab where you can modify, delete, or add skill relaxation settings for the group.

4. After making your changes in the Edit Call Distribution Group dialog box, click the **Save Group** button and then click the **Close** button to close the dialog box.
5. Click **Save** at the bottom of the page to save the changes to the routing strategy.

Deleting a Group of Teams or Skill Relaxation Settings

To delete a group of teams:

1. Display the Edit Routing Strategy page for the appropriate routing strategy (see [“Modifying a Routing Strategy” on page 120](#)).
2. In the **Call Distribution** section, click the Delete  button on the right side of the header for the group you want to delete.
3. Click **Save** to save this change to the routing strategy.

Specifying Call Distribution for a Cross-ACD Entry Point

Note: This feature is not available in the CC-One Salesforce Edition.

Enterprises that use Scorecard Routing to route calls to third-party ACDs are provisioned with one or more cross-ACD entry points. The Call Control section of a routing strategy for a cross-ACD entry point includes a two-tabbed section that provides controls for doing the following:


- Organizing the queues that will be served by the entry point into one or more groups.
- Specifying the call routing algorithm and other parameters used to route calls under various conditions (for an overview, see [“About CC-One Scorecard Routing” on page 53](#)).

Topics covered in this section:

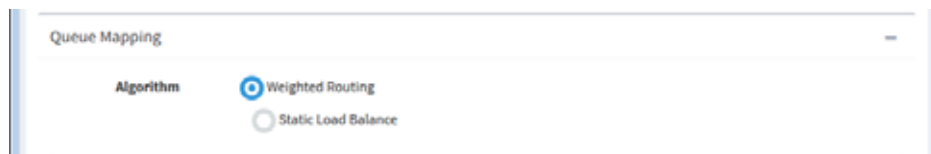
- [Specifying the Algorithm, Metrics, and Queue Groups](#)
- [Specifying Parameters for Static Load Balancing](#)
- [Specifying Parameters for Weighted Routing](#)

Specifying the Algorithm, Metrics, and Queue Groups

To specify the algorithm and queue escalation groups for a cross-ACD entry point:

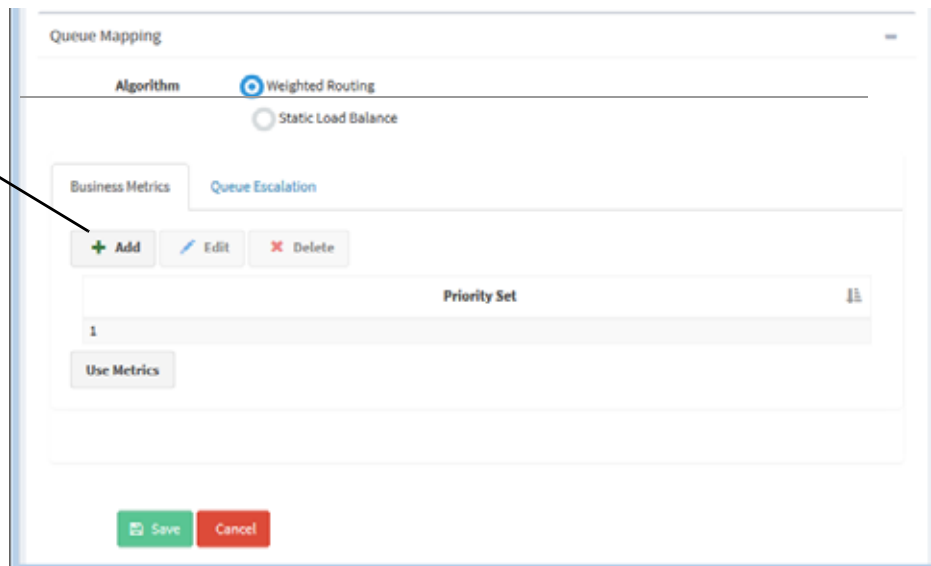
1. Do one of the following:
 - To create a new strategy, follow the instructions in [“Creating a Routing Strategy” on page 89](#), and then return to this procedure for instructions on specifying queue escalation.
 - To edit the queue escalation for an existing strategy do one of the following: from the list view, click the  button to the left of the strategy you want to modify, and then click **Edit**; or, from the calendar view, click the link to the strategy.

2. In the **Queue Mapping** section of the page, select the **Algorithm** the system will use to determine which proxy queue to route calls to:
 - **Static Load Balance.** Calls will be allocated based on the load spread specified for the proxy queues, irrespective of current queue size or handle times. When this algorithm is selected, the *Business Metrics* tab is disabled and the only enabled settings in the *Queue Escalation* tab are those for creating and editing groups of queues and assigning a load spread (%) to each queue.
 - **Weighted Routing.** Calls will be routed based on the weights specified for selected metrics within priority sets. When a call comes in, the weighted value of the metrics defined in the first priority set are computed for each queue. If multiple queues have equivalent values, a weighted value of the second priority set is computed. The call is routed to the queue with the best value.

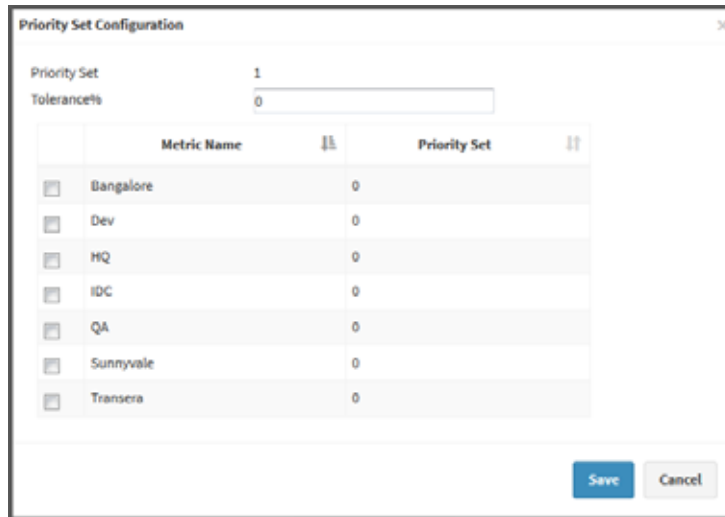


3. If *Static Load Balance* is the selected algorithm, skip to step 8.
4. If *Weighted Routing* is the selected algorithm, the **Business Metrics** tab displays controls for defining one or more *priority sets*. Click **Add** to create a priority set.

Click **Add** to create a priority set.



5. In the **Priority Set Configuration** dialog box that opens:
 - a. Select the check box next to each metric you want to include in the priority set. A priority set must include at least one metric, and you cannot include the same metric in more than one priority set.
 - b. Specify the **Tolerance %** for the set. When the metric values for two queues are compared, differences within the specified Tolerance percentage are ignored.
 - c. Click **Save**.



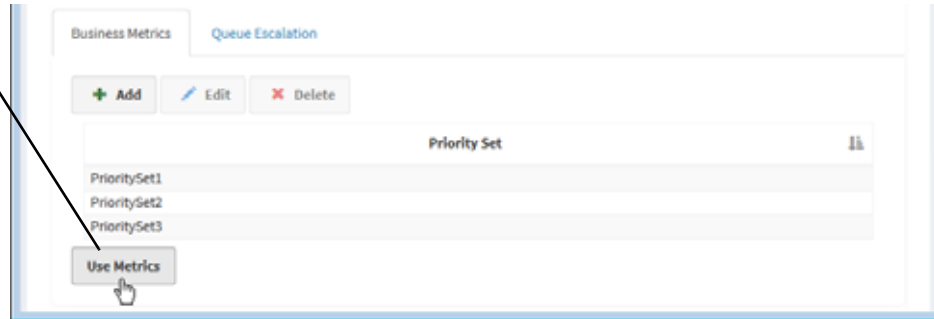
6. Repeat steps 4 and 5 for each additional priority set you want to define.

If a metric is already included in a priority set, the number assigned to the priority set is displayed in the Priority Set column, and that metric cannot be selected.



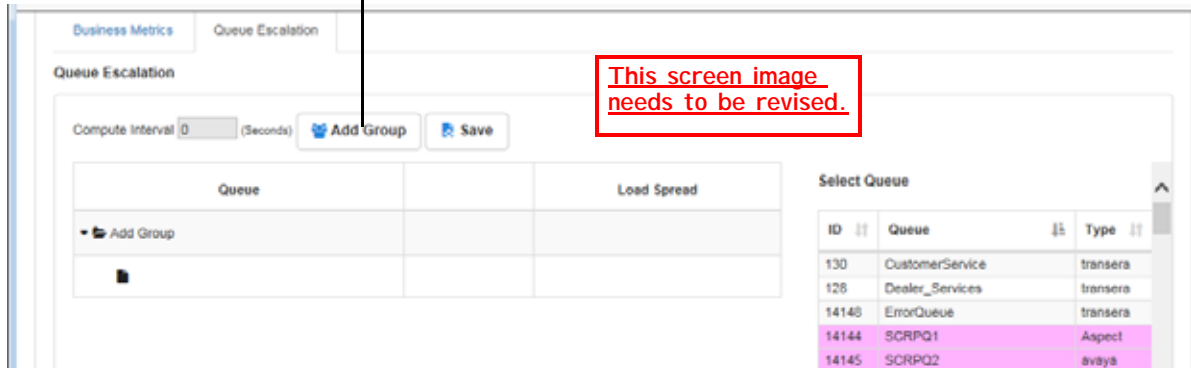
7. When finished, click the **Use Metrics** button at the bottom of the Business Metrics dialog box.

After adding and configuring priority sets, click Use Metrics.



- In the **Queue Escalation** tab, add a queue group by clicking the **Add Group** button. Repeat this step for each queue group that you want in the routing strategy.

Click this button to add a queue group.

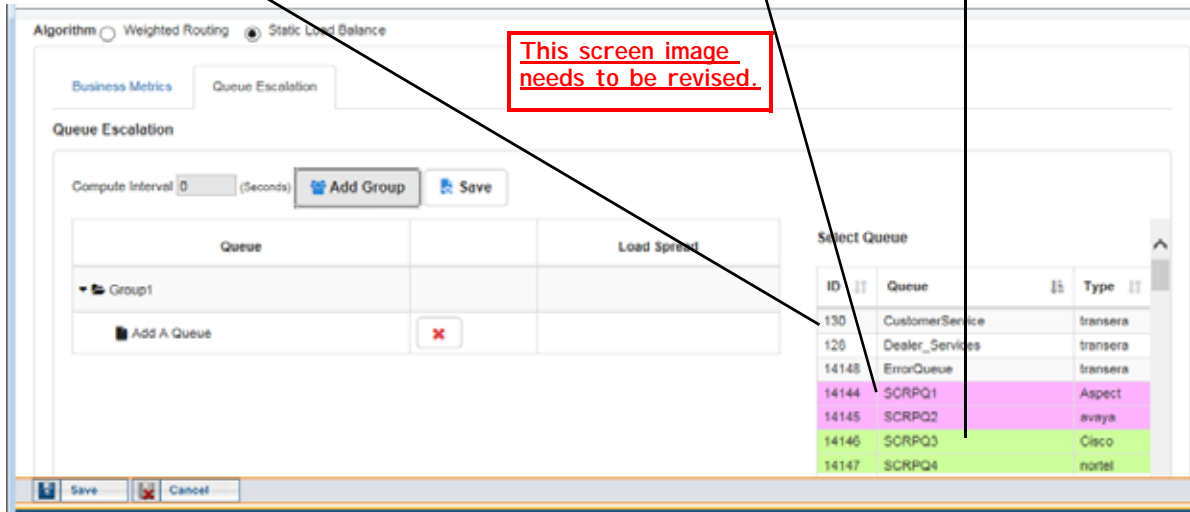


- To add a queue to a group, drag a row from the **Select Queue** list on the right side of the tab and drop it into a row beneath the **Group** folder. The names of shared proxy queues are displayed on a pink background, the names of dedicated proxy queues are displayed on a green background, and the names of **CC-One** queues are displayed on a white or gray background.

To add a queue to a group, drag a row from this list and drop it beneath the Group folder.

This is a *shared* proxy queue.

This is a *dedicated* proxy queue.



10. Specify the settings for each queue in the group as described in one of the following sections:

- “Specifying Parameters for Static Load Balancing” on page 112
- “Specifying Parameters for Weighted Routing” on page 113
- “Using the Show Metrics and Simulate Buttons” on page 119

Specifying Parameters for Static Load Balancing

If *Static Load Balance* is the selected algorithm, after organizing the queues that will be served by the cross-ACD entry point into one or more groups (as described in “Specifying the Algorithm, Metrics, and Queue Groups” on page 108), specify the load spread as follows:

1. Enter a value from 1 to 100 in the **Load Spread** column for each queue. The total spread across all queues must equal 100%.
2. When you are finished specifying the load spread for each queue, click the **Save** button to the right of the **Add Group** button. Then click **Save** on the lower-left side of the page to save the routing strategy.

Enter a Load Spread value for each queue

Click this button to save your queue escalation settings.

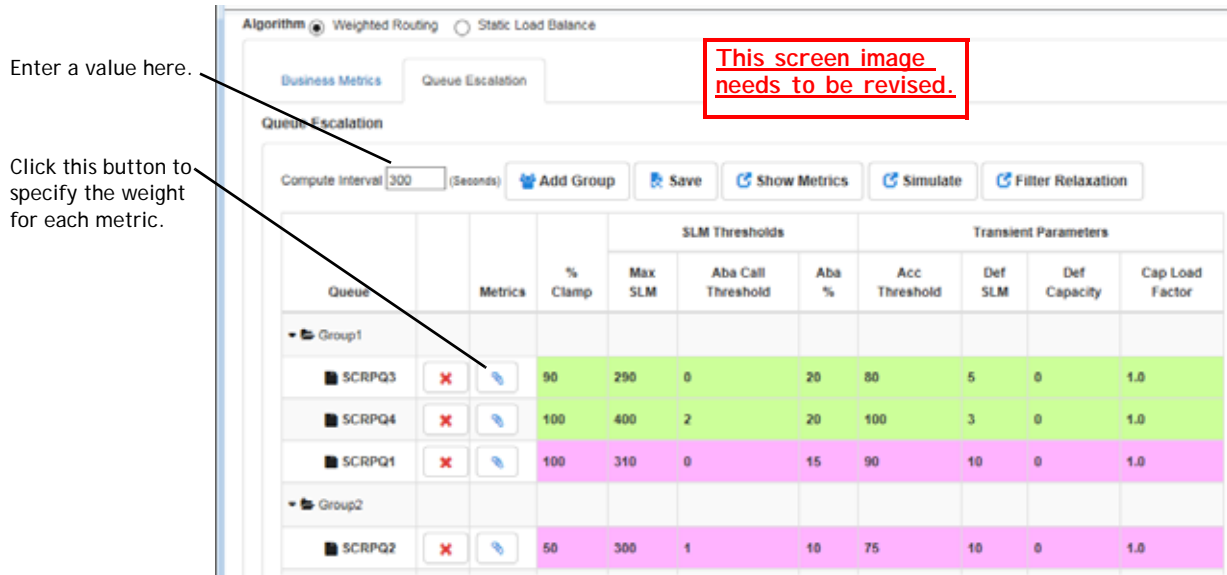
The screenshot displays the 'Queue Escalation' configuration window. At the top, the 'Algorithm' is set to 'Static Load Balance'. Below this, there are tabs for 'Business Metrics' and 'Queue Escalation'. The 'Queue Escalation' tab is active, showing a 'Compute Interval' of 0 seconds and buttons for 'Add Group' and 'Save'. A table lists queues under two groups: Group1 (SCRPG1 with Load Spread 50) and Group2 (CustomerService with Load Spread 30, and SCRPG2 with Load Spread 20). A 'Select Queue' list on the right shows various queue types, with SCRPG3 and SCRPG4 highlighted. Annotations include: 'Enter a Load Spread value for each queue' pointing to the 'Load Spread' column; 'Click this button to save your queue escalation settings.' pointing to the 'Save' button; and a red box containing the text 'This screen image needs to be revised.' pointing to the 'Load Spread' column.

Click this button to save the routing strategy.

Specifying Parameters for Weighted Routing

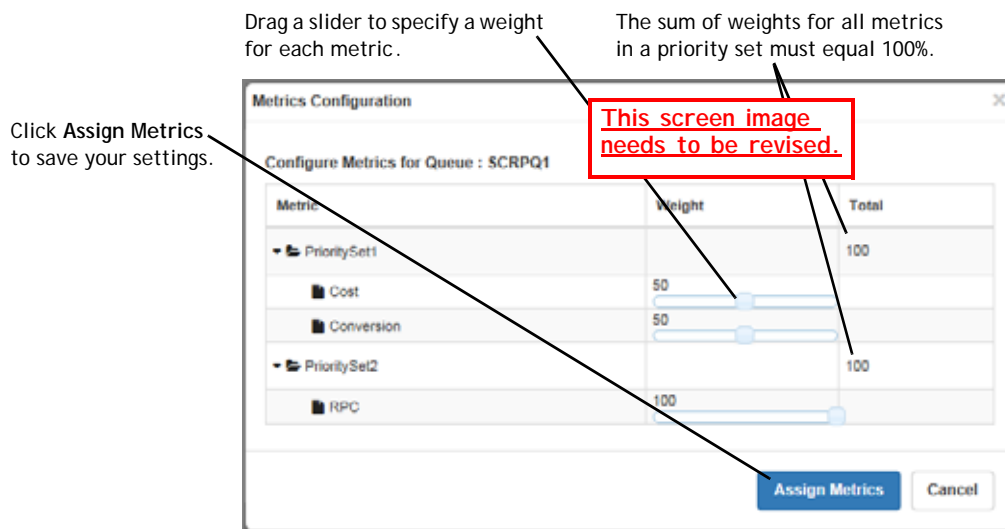
If *Weighted Routing* is the selected algorithm for the cross-ACD entry point, after following the procedure described in “[Specifying the Algorithm, Metrics, and Queue Groups](#)” on page 108, specify the call routing parameters in the Queue Escalation tab as follows:

1. In the **Compute Interval** field on the upper left side of the Queue Escalation tab, enter a value that represents the time interval after which the *Abandoned Call Threshold* will be considered and over which the *% Clamp* (maximum percentage of calls that should be sent to a queue) will be calculated.



2. To specify a weight for each metric:

- a. Click the button in the **Metrics** column.
- b. In the **Metrics Configuration** dialog box that opens, drag each slider to a value between 1 and 100 that represents the weight (as a percentage) for each metric. The sum of weights for all the metrics in each priority set must equal 100%.
- c. Click **Assign Metrics** to save your settings.

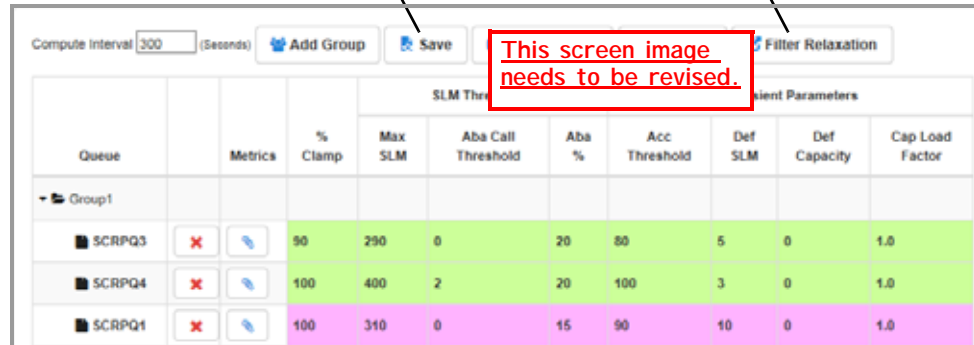


To open a dialog box that displays the weights currently assigned to each queue in the routing strategy, or to simulate call distribution based on different weights, see “Using the Show Metrics and Simulate Buttons” on page 119.

3. Specify the additional settings for each queue as described in the following table.

Click this button to save the settings specified in the Queue Escalation section.

Click this button to specify filter relaxation parameters.



Setting	Description
% Clamp	<p>Enter a value from 1 to 100.</p> <p>The percentage of calls routed to this queue should not exceed the value specified here during the interval specified in the <i>Compute Interval</i> field.</p> <p>The total of the % Clamp values across all queues in all groups must equal or exceed 100%.</p>
Max Capacity Load Factor	<p>Enter a multiple of the queue's <i>capacity</i> (which identifies the number of active agents currently handling calls for this queue). This setting determines how many active calls can be sent to the queue. For example, if the capacity of the queue is 14 and <i>Max Capacity Load Factor</i> is 1.5, then the routing engine will send a maximum of 21 active calls to this queue.</p> <p>In the case where the proxy queue's actual capacity is not being provided through a data feed, the routing engine will use a multiple of the queue's <i>Default Capacity</i> setting.</p>
SLM Thresholds	
Max SLM	<p>Enter a value that is greater than the value specified in the <i>Default SLM</i> field.</p> <p>If the ASA (average speed of answer) for this queue exceeds the value specified here, this queue will be excluded from the routing decision. If the ASA for every queue in the current group exceeds its specified Max SLM, queues in the next group will be considered in the routing decision.</p>
Aba Call Threshold (Abandoned Call Threshold)	<p>Specify the number of calls that must be routed to this queue during the <i>Compute Interval</i> before the <i>Abandoned %</i> will be considered in the routing decision.</p>

Setting	Description
Aba % (Abandoned %)	<p>Enter a value from 1 to 100.</p> <p>After the <i>Abandoned Call Threshold</i> has been reached, calls will be routed to this queue only if the percentage of abandoned calls for the queue is less than the value specified here.</p>
Transient Parameters	
Accuracy Threshold	<p>If this is a proxy queue, enter a value from 1 to 100.</p> <p>If this is a standard CC-One queue, the value is automatically set to 0 and cannot be changed.</p> <p>Accuracy is the percentage of ping events between the CC-One system and the third-party ACD (represented by the proxy queue) that were successful in a specified time interval. The accuracy for a CC-One queue is always 100%.</p>
Default SLM	<p>Enter a value that is less than the value specified in the <i>Max SLM</i> field; 0 is a valid value for this field.</p> <p>The SLM value specified here will be used to determine call routing for this queue when no vendor, real-time, or historical data is available.</p> <p>This setting applies only to proxy queues and is not relevant for CC-One queues.</p>
Default Capacity	<p>Specify the default number of active agents handling calls for this queue. This value will be used by the routing engine in the case where the proxy queue's actual capacity is not being provided through a data feed.</p>

4. Optionally specify relaxation settings as follows:
 - a. Click the **Filter Relaxation** button on the upper right side of the Queue Escalation tab.
 - b. In the dialog box that opens, click **Add**.

Click **Add** to add a filter relaxation cycle.

Queue	Filter Name	Relaxation Attribute	Value
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This screen image needs to be revised.

- c. In **Editing Cycle** dialog box that opens, click **Add Filter**; then select a queue, filter, and relaxation attribute from the drop-down lists and enter a value in the **Value** column as described in the following table. Repeat this step for each additional filter you want to include in the cycle, and then click **Save Cycle**.

Click **Add Filter**...

... then select a queue, filter, and relaxation attribute from the drop-down lists and specify a value in the **Value** column.

Click this button to save your settings.

Queue	Filter Name	Relaxation Attribute	Value
Q_Proxy_1	Capacity	Select Attribute Capacity Load Factor	0

This screen image needs to be revised.

Filter	Relaxation Attribute	Value
Abandons	Abandon %	Enter a number specifying how much to increase the <i>Abandoned %</i> value specified for the queue. Each relaxation cycle will increase the percentage as a cumulative. For example, if the original value is 10% and the relaxation value for the first cycle is 10, then the new value will be 20% in the first relaxation cycle. If the relaxation value for the second cycle is set to 10, the new value will be 30% in the second relaxation cycle.
	Call Threshold	Enter a number specifying how much to increase the number of calls specified for the queue in the <i>Abandoned Call Threshold</i> setting during the <i>Compute Interval</i> period before the abandons filter is applied. You can easily stop the system from applying the abandons filter on a queue by increasing this relaxation value to a high number.
Areacode-Blocking	Remove Blocking	Enter one of the following values: <ul style="list-style-type: none"> • 0 means do not remove area code blocking. • 1 means remove area code blocking for the queue.
Clamp Reached	Clamp %	Enter a number specifying how much to increase the <i>Percentage Clamp</i> value specified for the queue. Each relaxation cycle will increase the percentage as a cumulative. For example, if the original value is 10% and the relaxation for the first cycle is set to 10, then the new value will be 20% in the first relaxation cycle. If the relaxation for the second cycle is set to 10, the new value will be 30% in the second relaxation cycle.
Metric Exceeded	Metric Increment	Enter a number specifying how much to increase the <i>Max SLM</i> value specified for the queue. Each relaxation cycle will increase the percentage as a cumulative. For example, if the original value is 70000 milliseconds and the relaxation value specified for the first cycle is 10000 milliseconds, then the new value will be 80000 milliseconds in the first relaxation cycle. If the relaxation value specified for the second cycle is set to 10000, the new value will be 90000 milliseconds in the second relaxation cycle.

Filter	Relaxation Attribute	Value
Capacity	Capacity	Enter a number specifying how much to increase the <i>capacity</i> for the queue. This value overrides system computed capacity. For example, if the default capacity is 25, and the relaxation value specified for the first cycle is 5, then the capacity will be increased to 30 in the first relaxation cycle.
	Load Factor	Enter a value specifying how much to increase the queue's <i>Max Capacity Load Factor</i> . For example, if the current load factor is 1.5 and you specify .5, then the load factor will be increased to 2. Thus, if the current capacity of the queue is 14, the number of active calls that can be sent to the queue will be increased to 28 (14 multiplied by 2).

- Repeat step 4 for each additional relaxation cycle you want to add, and when you are finished adding cycles, click **Save Relaxation** on the lower right side of the dialog box.
- When you are finished adding groups and queues and specifying settings and relaxation cycles, click the **Save** button to the right of the **Add Group** button to save your settings. Then click **Save** on the lower-left side of the page to save the routing strategy.

Using the Show Metrics and Simulate Buttons

When the Weighted Routing algorithm is used, the Queue Escalation tab displays a *Show Metrics* and *Simulate* button.

Click this button to see which metric weights are assigned to each queue in the routing strategy.

Click this button to see how changing the weight metrics will affect the call routing decision.

Algorithm Weighted Routing Static Load Balance

Business Metrics Queue Escalation

Queue Escalation

Compute Interval (Seconds)

Queue	Metrics	% Clamp	SLM Thresholds			Transient Parameters				
			Max SLM	Aba Call Threshold	Aba %	Acc Threshold	Def SLM	Def Capacity	Cap Load Factor	
Group1										
SCRPG3		90	290	0	20	80	5	0	1.0	

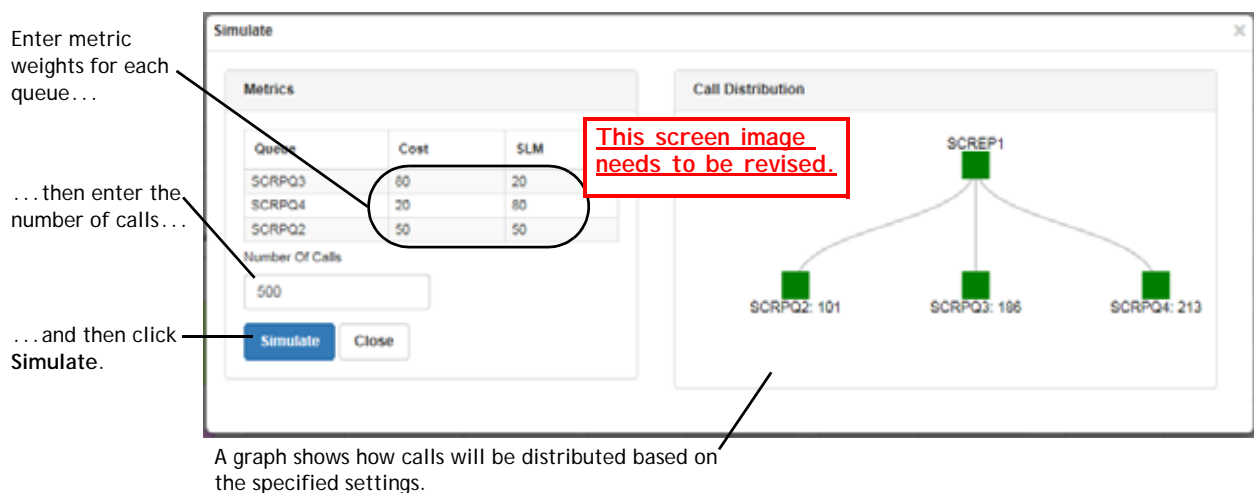
To open a dialog box that displays the weights currently assigned to each queue in the routing strategy:

- ▶ Click the **Show Metrics** button.

To see how changing the weights of metrics will affect call distribution:

1. Click the **Simulate** button.
2. In the dialog box that opens, specify metric weights for each queue.
3. Enter a number in the **Number of Calls** field.
4. Click the **Simulate** button.

A graph in the right frame of the dialog box displays how calls will be distributed for the specified number of calls based on the weights for each queue.





Modifying a Routing Strategy

Before modifying a routing strategy, be aware of the following:

- Although you cannot copy the current strategy, you can modify any of its settings except those that affect execution time or date. These changes have no effect on the recurring scheduled version of the strategy.
- When you modify the current strategy, your changes take effect immediately for new calls and remain in effect until the current strategy ends. If there are calls in the queue when the modifications are made, the existing queued calls will follow the original strategy unless you select the **Apply changes to current calls in queue** check box to the right of the **Save** button.
- When you modify a strategy that is not the current strategy, your changes take effect according to the scheduled times specified in the strategy.

To modify a routing strategy:

1. Open the **Routing Strategy** module.
2. If you are modifying a non-global routing strategy:
 - a. On the Call Routing Strategy page, select an entry point or queue from the **Select Entry Point/Queue** drop-down list.

The routing strategies for the selected entry point or queue are displayed.
 - b. Do one of the following:
 - From the list view, click the  button to the left of the strategy you want to modify and select **Edit**.
 - From the calendar view, click the link to the strategy you want to modify.
3. If you are modifying a global routing strategy:
 - a. Click the **Call Routing** button on the menu bar, select **Global Routing Strategies**, and on the Global Routing Strategy page, select the **Entry Point** or **Queue** button on the upper-left side page.
 - b. If you are modifying a strategy for cross-ACD entry points or for proxy queues, set the **CC-One ACD** field to **False**.
 - c. Click the  button to the left of a the strategy you want to modify and select **Edit**.
4. Make your changes. For information about each setting, see the setting descriptions table beginning on [page 91](#).
5. If you are modifying the current strategy and want the changes to apply to calls currently in queue, select the **Apply changes to current calls in queue** check box on the lower right side of the page. If this check box is not selected, the changes will apply only to new calls.
6. Click **Save** to save your changes.

Deleting and Restoring Routing Strategies



Caution: When you delete a current strategy, the next strategy scheduled for that time period is activated. Do not delete a current strategy unless an alternate strategy has already been created.

When you delete a routing strategy, it is moved to the *Deleted Routing Strategies* or *Deleted Global Routing Strategies* page where it can be restored or permanently deleted within 30 days. After 30 days, it will be permanently deleted by the system.

Topics covered in this section:


- [Deleting a Non-Global Routing Strategy](#)
- [Deleting a Global Routing Strategy](#)
- [Restoring or Permanently Deleting a Non-Global Routing Strategy](#)
- [Restoring or Permanently Deleting a Global Routing Strategy](#)

Deleting a Non-Global Routing Strategy

To delete a non-global routing strategy:

1. Open the Routing Strategy module and on the Call Routing Strategy page, click the **List View** button.
2. Select an entry point or queue from the **Select Entry Point/Queue** drop-down list.

The routing strategies for the selected entry point or queue are displayed.


3. Click the  button to the left of the strategy you want to delete and select **Delete**. In the confirmation dialog box that opens, click **OK**.

The strategy is moved to the Deleted Routing Strategies page where it can be restored or permanently deleted (see “[Restoring or Permanently Deleting a Non-Global Routing Strategy](#)” on page 123).

Deleting a Global Routing Strategy

To delete a global routing strategy:

1. Open the Routing Strategy module, click the **Call Routing** button on the menu bar, and select **Global Routing Strategies**.
2. On the Global Routing Strategy page, select the **Entry Point** or **Queue** button on the upper-left side page.

3. If you are deleting a strategy for cross-ACD entry points or for proxy queues, set the **CC-One ACD** field to **False**.
4. Click the  button to the left of the strategy you want to delete and select **Delete**. In the confirmation dialog box that opens, click **OK**.


The strategy is moved to the Deleted Global Routing Strategies page where it can be restored or permanently deleted (see [“Restoring or Permanently Deleting a Global Routing Strategy”](#) on page 124).

Restoring or Permanently Deleting a Non-Global Routing Strategy

To restore or permanently delete a non-global routing strategy:

1. Open the Routing Strategy module and on the Call Routing Strategy page, click the **Deleted Strategies** button.
2. Make a selection from the **Select Entry Point/Queue** drop-down list.

The deleted routing strategies for the entry point or queue you selected are displayed.

3. Click the  button to the left of the strategy you want to either restore or permanently delete and do one of the following:
 - To permanently delete the strategy, click **Delete**. Then, in the confirmation dialog box, click **OK**.
 - OR -
 - To restore the strategy, click **Restore**.


The Restore Routing Strategy page appears, displaying the settings for the routing strategy.

4. If you are restoring a strategy, modify the settings if you want to, and then click **Restore**.

If any settings conflict with an existing routing strategy, a message informs you. In this case, you must modify the settings before the strategy can be restored.

Restoring or Permanently Deleting a Global Routing Strategy

To restore or permanently delete a global routing strategy:

1. Open the Routing Strategy module, click the **Call Routing** button on the menu bar, and select **Global Routing Strategies**.
2. On the Global Routing Strategy page, click the **Deleted Global Strategies** button.
3. On the page that appears, select the **Entry Point** or **Queue** button.
4. If you are restoring or permanently deleting a strategy for cross-ACD entry points or for proxy queues, set the **CC-One ACD** field to **False**.
5. Click the  button to the left of the strategy you want to either restore or permanently delete and do one of the following:
 - To permanently delete the strategy, click **Delete**. Then, in the confirmation dialog box, click **OK**.
 - OR -
 - To restore the strategy, click **Restore**.

The Restore Global Routing Strategy page appears, displaying the settings for the routing strategy.

6. If you are restoring a strategy, modify the settings if you want to, and then click **Restore**.

If any settings conflict with an existing routing strategy, a message informs you. In this case, you must modify the settings before the strategy can be restored.

Routing Strategy Examples

The following examples illustrate how calls are routed for each strategy type in the standard CC-One service environment: The screen images in this section (and references to them) to be removed unless access can be provided to a system that includes the example entities (such as sites, teams, queues).

- “Longest Available Agent Strategy Example” on page 125
- “Load Balance Strategy Examples” on page 126
- “Priority-Based Strategy Example 1” on page 132
- “Priority-Based Strategy Example 2” on page 133
- “Skills-Based Routing Example” on page 135

Longest Available Agent Strategy Example

FastFlights Corporation has one entry point, 1-800-555-1585, serviced by a single queue, CustService, which routes calls to three sites: Athens, Troy, and Oakville. Each site has one team associated with it.

A queue strategy is created that resembles the following.

Screen image to be removed unless access can be provided to a system that includes the example entities

Team Name	Site Name	Status	Team Type
AthensCustSvc	Athens	In Service	Agent Based
TroyCustSvc	Troy	In Service	Agent Based
OakCustSvc	Oakville	In Service	Agent Based

How This Works

When the strategy is implemented, calls coming to the 1-800-555-1585 entry point are placed in a single CustService queue and routed to agents on the two teams specified in the Call Distribution portion of the queue strategy settings (AthersCustSvc and TroyCustSvc). Where calls are routed is based on which team has the longest available agent. If all agents on both teams are busy, the calls remain in queue until an agent becomes available.

Load Balance Strategy Examples

A load balance strategy allows you to control the portion of calls that are serviced by each of the various teams in your call center. Load balance strategies can be further refined to be either *dynamic* or *static*. Calls can be allocated to each team on a *percentage* basis or a *number of calls* basis.

Note: In a load balance strategy using percentage allocation, a call is not distributed to a second team when the first team is unavailable. Instead, the system retries the first team's DN for the number of times specified for the strategy and then overflows the call.

Sample Scenarios

FastFlights Corporation has one entry point, 1-800-555-1585, serviced by a single queue, CustService, which routes calls to three sites: Athens, Troy, and Oakville. Each site has a customer service team associated with it.

Because you have the option of specifying both *type* (dynamic or static) and *mode* (percentage or number of calls), there are four possible load balancing scenarios:

- [Option 1: Static Load Balancing on a Percentage Basis](#)
- [Option 2: Dynamic Load Balancing with Percentage Allocation](#)
- [Option 3: Static Load Balancing on a Number Basis](#)
- [Option 4: Dynamic Load Balancing on a Number Basis](#)

Option 1: Static Load Balancing on a Percentage Basis

To set up this load balance strategy, *Percentage* is selected in the Mode field, and *Static* in the Type field. Two teams, AthensCustSvc and TroyCustSvc are selected in the Call Distribution section. AthensCustSvc is allocated 67% of the calls; TroyCustSvc is allocated 33% of the calls. Note that the total percentage equals 100 across the two teams.

Screen image to be removed unless access can be provided to a system that includes the example entities

Team Name	Percentage / Number of Calls	Site Name	Status	Team Type
AthensCustSvc	67	Athens	In Service	Capacity Based
TroyCustSvc	33	Troy	In Service	Capacity Based

How This Works

Static routing is based on the order of call arrival, or call sequence, irrespective of the number of currently active calls. When this strategy is implemented, calls coming to the CustService queue are allocated on a percentage ratio of 2:1 (67% : 33%). Therefore, the first two incoming calls are routed to AthensCustSvc (A). The next call, call 3, is routed to TroyCustSvc (T). Calls 4 and 5 go to AthensCustSvc, Call 6 to TroyCustSvc, and so forth.

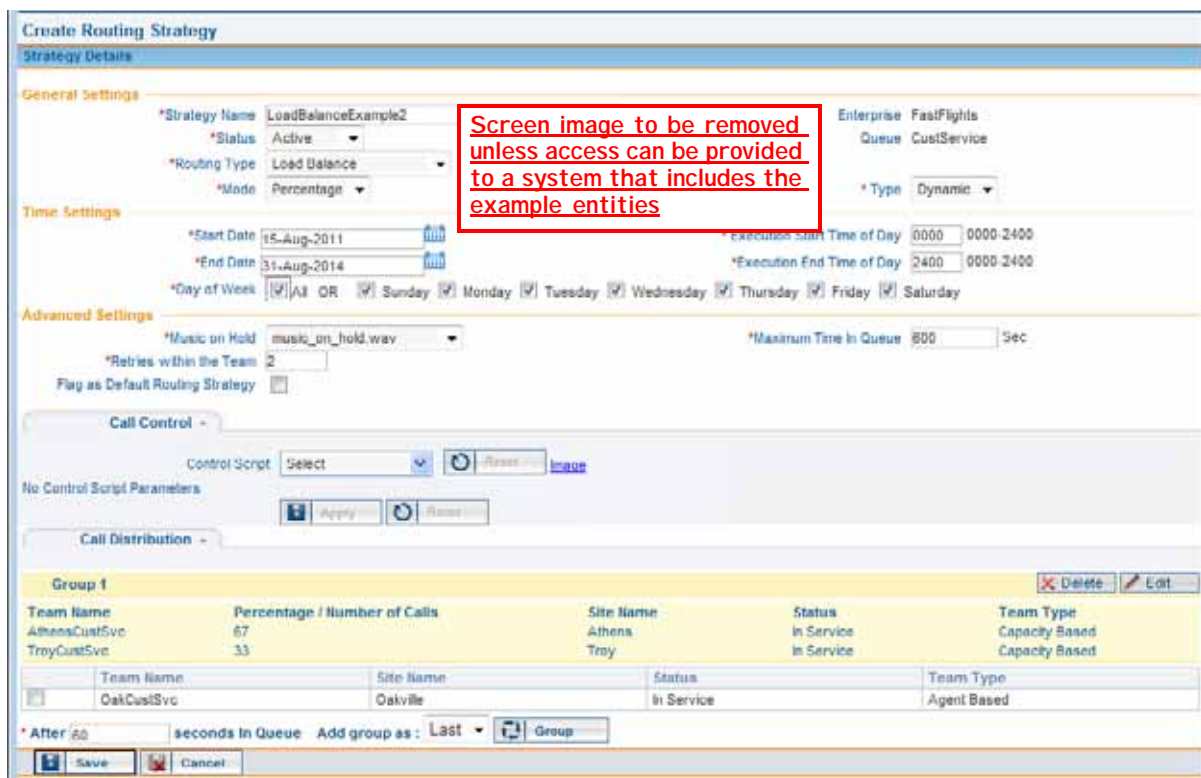
Call:	1	2	3	4	5	6
	↓	↓	↓	↓	↓	↓
Team:	A	A	T	A	A	T

Static routing operates on the concept of *pre-determined allocation*, meaning that the decision on where to route the next call is based on the count of previous calls sent to AthensCustSvc or TroyCustSvc.

Routing is irrespective of call length: even if there are calls waiting for AthensCustSvc and TroyCustSvc is free, TroyCustSvc cannot take a call until the AthensCustSvc call count has been satisfied.

Option 2: Dynamic Load Balancing with Percentage Allocation

To set up this load balance strategy, *Percentage* is selected in the Mode field, and *Dynamic* in the Type field. The two teams, AthensCustSvc and TroyCustSvc, are selected in the Call Distribution section. AthensCustSvc is allocated 67% of the calls; TroyCustSvc is allocated 33% of the calls. Note that the total percentage equals 100 across the two teams.



How This Works

Dynamic routing operates on the concept of *balancing the current load*. When this strategy is implemented, calls coming to the CustService queue are allocated on a percentage ratio of 2:1 (67%:33%). When a call comes in, the system looks at the number of current active calls for both teams and routes the call based on the load-balancing percentages assigned to the teams.

For example, suppose a total of 298 calls are being handled by the two teams assigned to the strategy.

- AthensCustSvc currently has 198 active calls. It has an assigned load balance percentage of 67.
- TroyCustSvc current has 100 active calls and has an assigned load balance percentage of 33.

AthensCustSvc should handle 67% of the total, or 199.6 calls ($298 * .67$). Currently, this team is 1.6 calls *below* its assigned load balance.

TroyCustSvc should handle 33% of the total, or 98.34 calls ($298 * .33$). Currently, this team is 1.56 calls *above* its assigned load balance.

When the next call arrives, AthensCustSvc will be tried first. If an agent is available, the call will be routed there. In the event that all agents are busy, the call will be routed to TroyCustSvc.

With dynamic routing, the system tries to route calls in such a way as to best balance the call load. However, if that is not possible, the call will be routed such that it is handled in the most efficient way.

Option 3: Static Load Balancing on a Number Basis

To set up this load balance strategy, *Number* is selected in the Mode field, and *Static* in the Type field. The two teams, AthensCustSvc and TroyCustSvc are selected in the Call Distribution section. AthensCustSvc is allocated 200 calls; TroyCustSvc is allocated 10000 calls.

Screen image to be removed unless access can be provided to a system that includes the example entities

Team Name	Percentage / Number of Calls	Site Name	Status	Team Type
AthensCustSvc	200	Athens	In Service	Capacity Based
TroyCustSvc	10000	Troy	In Service	Capacity Based

How This Works

Static routing is based on the order of calls, or call sequence, irrespective of call length. When the strategy is implemented, calls coming in to the CustService queue are sent to AthensCustSvc and TroyCustSvc in a round-robin fashion. Call 1 goes to Athens, call 2 to Troy, call 3 to Athens, Call 4 to Troy, and so forth.

After Athens receives 200 calls, all subsequent calls are sent to Troy. When the number of calls specified for each team is reached, no more calls can be routed. For this reason, it is important that you set up your teams such that they can handle expected call capacity.

In static routing, calls are routed in a set order, irrespective of call length. As stated in “Option 2: Dynamic Load Balancing with Percentage Allocation” on page 128, if there are calls waiting for AthensCustSvc and TroyCustSvc is free, TroyCustSvc cannot take a call until the AthensCustSvc call count has been satisfied.

Option 4: Dynamic Load Balancing on a Number Basis

To set up this load balance strategy, *Number* is selected in the Mode field, and *Dynamic* in the Type field. The two teams, AthensCustSvc and TroyCustSvc, are selected in the Call Distribution section. AthensCustSvc is allocated 200 calls; TroyCustSvc is allocated 10000 calls.

Screen image to be removed unless access can be provided to a system that includes the example entities

Team Name	Percentage / Number of Calls	Site Name	Status	Team Type
AthensCustSvc	200	Athens	In Service	Capacity Based
TroyCustSvc	10000	Troy	In Service	Capacity Based

How This Works

Dynamic routing operates on the concept of *balancing the current load*. When this strategy is implemented, calls coming to the CustService queue are allocated as follows: the system first tries AthensCustSvc; if no agents are available, it tries TroyCustSvc. Subsequent calls are routed as follows:

Call 1 -- > first tries AthensCustSvc, then TroyCustSvc

Call 2 -- > first tries TroyCustSvc, then AthensCustSvc

Call 3 -- > first tries AthensCustSvc, then TroyCustSvc and so forth

Note however that calls will be routed to whatever agent is available on either team so as to reduce the wait time for a call. Again, because this is based on number of calls, after 200 calls have been handled by AthensCustSvc, all subsequent calls are routed to TroyCustSvc.

Priority-Based Strategy Example 1

When priority-based routing is in use, calls are routed to teams based on a priority rating assigned to each team. The following example illustrates these concepts and explain how priority-based routing works.

Sample Scenario

FastFlights Corporation has one entry point, 1-800-555-1585, serviced by a single queue, CustService, which routes calls to three sites: Athens, Troy, and Oakville. Each site has one customer service team associated with it.

The Athens team is less expensive to operate, so all incoming calls are routed to AthensCustSvc first. If all agents are busy on that team, the system attempts to route the calls to the TroyCustSvc team. The settings for this strategy specify a priority for each team: AthensCustSvc is assigned a priority of 1; TroyCustSvc is assigned a priority of 2. The teams are then placed in Group 1.

If an incoming call is not handled by either team, then after 60 seconds, agents from the OakCustSvc team are made available to answer the calls. OakCustSvc is placed in Group 2, and is assigned a priority of 3.

The settings for this user strategy are shown in the following illustration.

Screen image to be removed unless access can be provided to a system that includes the example entities

Call Distribution					
Group 1					
Team Name	Priority	Site Name	Status	Team Type	
AthensCustSvc	1	Athens	In Service	Capacity Based	
TroyCustSvc	2	Troy	In Service	Capacity Based	
Group 2 After 60 seconds in Queue					
Team Name	Priority	Site Name	Status	Team Type	
OakCustSvc	3	Oakville	In Service	Agent Based	

How This Works

When the strategy is implemented, calls coming in to the CustService queue are routed to agents on the two teams in Group 1, AthensCustSvc and TroyCustSvc.

AthensCustSvc has a priority of 1; TroyCustSvc has a priority of 2. Calls are first routed to agents in the AthensCustSvc team (priority 1). If all agents on that team are busy, calls are routed to the TroyCustSvc team (priority 2). If all agents on both teams are busy, calls are queued for 60 seconds. If the Group1 agents are still busy, the OakCustSvc agents become available to handle the calls.

Priority-Based Strategy Example 2

In this example, there are two queues. Each queue must have a strategy associated with it. As described in [“Priority-Based Strategy Example 1” on page 132](#), you assign priorities to each team in the strategy for each queue. The priority indicates the order in which calls are routed.

Sample Scenario

ABC Insurance company has two queues:

- The AUTO queue routes customer calls regarding auto insurance
- The HOME queue routes calls regarding homeowners insurance

There is one main call center, located in Phoenix. The Phoenix site has three teams: Auto, Home, and General.

AUTO Queue

Calls regarding auto insurance come in to this queue and ideally, should be handled by the Auto team. However, during peak times it is helpful to have another team available to handle calls. The agents on the General team have been trained to answer basic insurance-related questions. Therefore the General team is a good backup option for the Auto calls.

You would set up a priority-based strategy for this queue, with a group of two teams: the Auto team, with a priority of 1, and the General team, with a priority of 2. Calls will always be routed first to the Auto team, but if no agents are available, the General team will be tried. If there are agents available on both teams, the call will always go to the Auto team because it has a priority of 1.

The strategy settings for the AUTO queue are shown in the following illustration.

Create Routing Strategy

Strategy Details

General Settings

*Strategy Name: Auto
 *Status: Active
 *Routing Type: Priority Based

Enterprise: ABC_Insurance
 Queue: AUTO

Time Settings

*Start Date: 15-Aug-2011
 *End Date: 31-Aug-2014
 *Day of Week: All OR Sunday Monday Tuesday Wednesday Thursday Friday Saturday

*Execution Start Time of Day: 0000 - 0000-2400
 *Execution End Time of Day: 2400 - 0000-2400

Advanced Settings

*Music on Hold: music_on_hold.wav
 *Retries within the Team: 2
 *Maximum Time In Queue: 600 Sec
 Flag as Default Routing Strategy:

Call Control

Control Script: Select [Reset] [Image]

No Control Script Parameters
 [Apply] [Reset]

Call Distribution

Group 1 [Delete] [Edit]

Team Name	Priority	Site Name	Status	Team Type	
Auto	1	Phoenix	In Service	Capacity Based	
General	2	Phoenix	In Service	Capacity Based	
<input type="checkbox"/>	Team Name	Priority	Site Name	Status	Team Type
<input type="checkbox"/>	Home	3	Phoenix	In Service	Capacity Based

* After 60 seconds In Queue Add group as: Last [Group]

[Save] [Cancel]

Screen image to be removed unless access can be provided to a system that includes the example entities

HOME Queue

The Home insurance team could also use help during peak call times—the General team can fill in when needed. As described earlier, the General team serves as backup. Therefore, the strategy for this queue is set up to be priority-based with a group of two teams: the Home team, with a priority of 1, and the General team, with a priority of 2.

The strategy settings for the HOME queue are shown in the next illustration.

Skills-Based Routing Example

If your enterprise uses the optional Skills-Based Routing feature, you can route calls to teams based on skill requirements assigned to the calls and the skill level of agents. The following example illustrates how skills-based routing works.

Sample Scenario

ABC Technology provides technical support in both Spanish and English for software products that run on three different operating systems: Windows, Mac, and Linux. The company has one entry point, 1-800-555-HELP, serviced by a single queue, AllProductLine, which routes calls to two sites: Denver CO and Plano TX. Each site has one team associated with it.

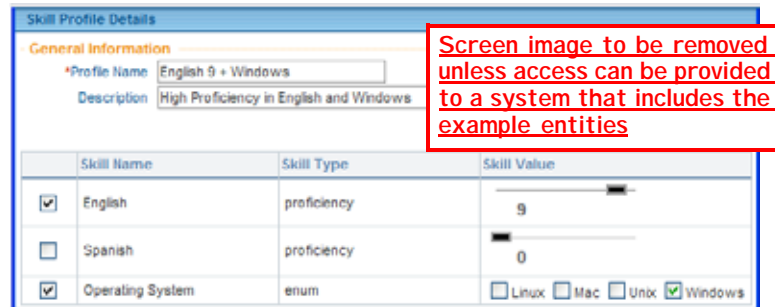
Agents on both teams speak either English or Spanish with high proficiency, and some agents on each team speak both English and Spanish well enough to handle calls in either language, but are more proficient in one language than in the other.

All agents have been trained to handle basic software issues on any operating system, but each agent has a high degree of expertise in one of the three operating systems.

Setting Up the Skills and Skill Profiles

To set up skills-based routing for ABC Technology, you would first define three skills. In this example two are proficiency skills (English and Spanish) and one is an enum skill (Operating System) with three predefined values (Windows, Mac, and Linux).

Next, you would the define the needed skill profiles and assign one to each agent. In this example, 12 profiles have been defined for ABC Technology’s 60 agents. The settings for one of the profiles is shown in the next illustration, and the settings for each of the 12 profiles are described in the table that follows.



Screen image to be removed unless access can be provided to a system that includes the example entities

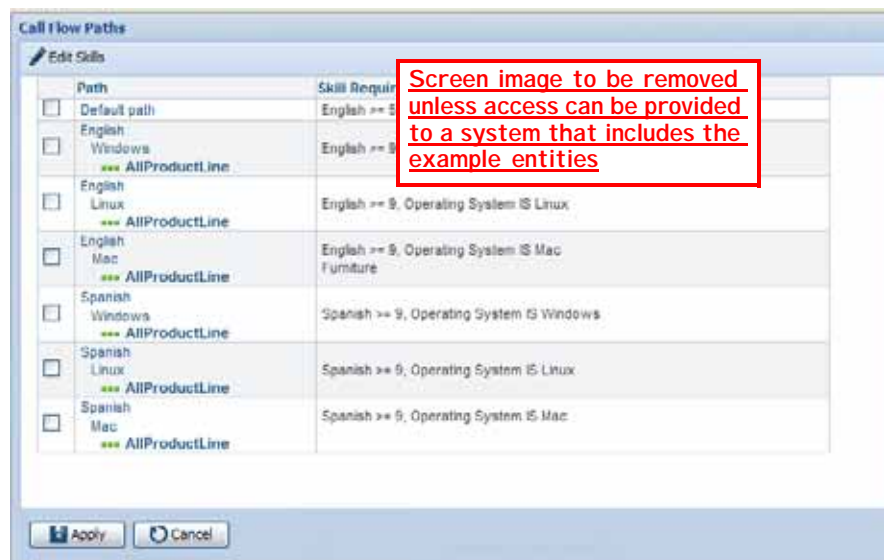
Skill Profile Name	Skill Name	Skill Type	Skill Value
English 9+Windows	English	Proficiency	9
	Operating System	enum	Windows
English 9+Mac	English	Proficiency	9
	Operating System	enum	Mac
English 9+Linux	English	Proficiency	9
	Operating System	enum	Linux
English 9+Spanish 6+Windows	English	Proficiency	9
	Spanish	Proficiency	6
	Operating System	enum	Windows
English 9+Spanish 6+Mac	English	Proficiency	9
	Spanish	Proficiency	6
	Operating System	enum	Mac
English 9+Spanish 6+Linux	English	Proficiency	9
	Spanish	Proficiency	6
	Operating System	enum	Linux
Spanish 9+Windows	Spanish	Proficiency	9
	Operating System	enum	Windows
Spanish 9+Mac	Spanish	Proficiency	9
	Operating System	enum	Mac
Spanish 9+Linux	Spanish	Proficiency	9
	Operating System	enum	Linux

Skill Profile Name	Skill Name	Skill Type	Skill Value
Spanish 9+English 6+Windows	Spanish	Proficiency	9
	English	Proficiency	6
	Operating System	enum	Windows
Spanish 9+English 6+Mac	Spanish	Proficiency	9
	English	Proficiency	6
	Operating System	enum	Mac
Spanish 9+English 6+Linux	Spanish	Proficiency	9
	English	Proficiency	6
	Operating System	enum	Linux

Assigning Skill Requirements to the Incoming Calls

In the entry point routing strategy for skills-based routing, skill requirements are assigned to calls based on menu selections collected during call treatment as defined in the call control script.

After the control script has been created and uploaded to the CC-One system, you would create a routing strategy for the entry point (1-800-555-HELP) and map skill requirements to each call path. In this example, all calls are assigned a proficiency of 9 in either Spanish or English plus an Operating System skill of either Windows, Mac, or Linux



The calls are then distributed to the AllProductLine queue, where they wait for an agent with the required skills.

Specifying the Call Distribution Settings

Ideally, calls should be handled by the agents who have expertise in the caller's operating system and high proficiency in the caller's language. However, during peak times it is helpful to have other agents available to handle calls.

The queue routing strategy settings for the AllProductLine queue are shown in the next illustration.

Strategy Details

General Settings

Strategy Name: All ProductLine SBR
 * Status: Active
 * Routing Type: Skills Based
 Longest Available Agent (selected) | Best Available

Time Settings

* Start Date: 29-Oct-2008 | * Execution Start Time of Day: 0000 | 0000-2400
 * End Date: 31-Oct-2026 | * Execution End Time of Day: 2400 | 0000-2400
 * Day of Week: All OR Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Advanced Settings

* Music on Hold: pianoagentsbusy.wav | * Maximum Time In Queue: 6000 Seconds
 * Retries within the Team: 2

Call Control

Control Script: queue.js | Parameters: MIQ: pianoagentsbusy.wav (mediaFile, Music In Queue)

Call Distribution

Group 1			
Team Name	Site Name	Status	Team Type
DenverTeam	Denver CO	In Service	Agent Based
PlanoTeam	Plano TX	In Service	Agent Based

Group 2 After 60 seconds In Queue

Skill Relaxation
 English Decrease 3
 Spanish Decrease 3

Group 3 After 60 seconds In Queue

Skill Relaxation
 Operating System Remove

When a call comes in to the AllProductLine queue, it waits for an agent on either team (DenverTeam and PlanoTeam) who has skills that match the skill requirements assigned to the call (a proficiency of 9 in either Spanish or English, based on the caller's first menu selection, plus an Operating System skill of either Windows, Mac, or Linux, based on the caller's second menu selection).

In this example, if more than one agent with matching skills is available, the call is routed to the agent who has been available the longest.

If all agents with matching skills are busy, the call is queued for 60 seconds. Then, if a matching agent is still not available, the English and Spanish skill requirements are decreased by 3, thus widening the pool of agents with matching skills. If the call is still in the queue after another 60 seconds, the Operating System skill is dropped, further widening the pool of matching agents.

For example, suppose a caller selects English as the language and Windows as the operating system. In this case, the call must be matched with an agent who has been assigned one of the following skill profiles:

- English 9+Windows
- English 9+Spanish 6+Windows

If a matching agent is not available after 60 seconds, the pool enlarges to include agents assigned the following skill profile:

- Spanish 9+English 6+Windows

If a matching agent is not available after another 60 seconds, the pool enlarges even more to include agents with the following skill profiles:

- English 9+Mac
- English 9+Spanish 6+Mac
- Spanish 9+English 6+Mac
- English 9+Linux
- English 9+Spanish 6+Linux
- Spanish 9+English 6+Linux

Scheduling Team Capacity

A team's capacity setting represents the number of simultaneous calls the team can handle. Each capacity-based team is provisioned with a static capacity value of up to 10,000 (see “Teams” beginning on page 322).

You can create scheduled team capacity strategies to override these settings in response to changing call center conditions. If a team capacity strategy is not created for a team, the system uses the capacity value provisioned for the team.

Because teams can service multiple queues, team capacity is independent of the call routing strategies that you create for queues.

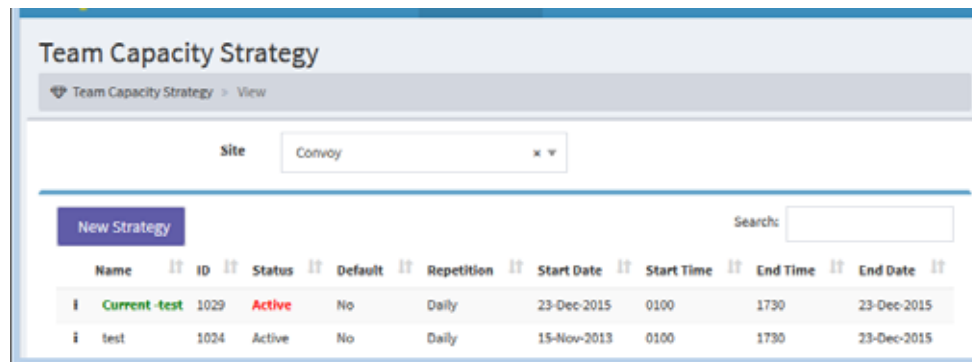
Topics covered in this section:

- [Viewing Scheduled Team Capacity Strategies](#)
- [Creating or Modifying a Scheduled Team Capacity Strategy](#)
- [Deleting a Scheduled Team Capacity Strategy](#)

Viewing Scheduled Team Capacity Strategies

To view existing team capacity strategies:

1. Open the **Routing Strategy** module and click the **Team Capacity** button on the menu bar.
2. If the scheduled team capacity strategies for the site you want to view are not currently displayed, make a selection from the **Site** drop-down list.



Name	ID	Status	Default	Repetition	Start Date	Start Time	End Time	End Date
Current-test	1029	Active	No	Daily	23-Dec-2015	0100	1730	23-Dec-2015
test	1024	Active	No	Daily	15-Nov-2013	0100	1730	23-Dec-2015

The page displays a grid listing the scheduled team capacity strategies that have been created for the selected site. Following is a description of each column.

Column	Description
Name	The name assigned to the strategy when it was created.
ID	The identification number of the strategy. This number is automatically assigned by the system.
Status	<p>Indicates the status of the strategy.</p> <ul style="list-style-type: none"> • Current means that this is a snapshot of the current team capacity strategy for the selected site. You cannot copy the current team capacity strategy, but you can modify any setting that does not affect execution time or date. You can delete the current team capacity strategy, but do not delete it before creating a different strategy for the same time interval. Your changes will not affect the recurring scheduled version of the strategy. • Active means the strategy will become effective at the specified start time on the specified start date. • Not Active means the strategy will not become effective regardless of the specified start time and date. This status lets you save a strategy for future use or as a draft to continue working on later.
Default	Indicates whether the strategy is the default. A strategy that is <i>not</i> flagged as default overrides a default strategy and is used as an exception to the default schedule.
Repetition	Specifies whether the strategy is scheduled to be repeated daily or only on specific days of the week.
Start Date	The date the strategy is scheduled to start.
Start Time	The time the strategy is scheduled to start (in 24-hour format) for any given day in the specified date range.
End Time	The time the strategy is scheduled to end (in 24-hour format) for any given day in the specified date range.
End Date	The date the strategy is scheduled to end.

3. To view strategy information, click the button next to the strategy you want to view, and then click **Edit**.

Creating or Modifying a Scheduled Team Capacity Strategy


Before modifying a team capacity strategy, be aware of the following:

- Although you cannot copy the current team capacity strategy, you can modify any of its settings except those that affect execution time or date. These changes have no effect on the recurring scheduled version of the strategy.
- When you modify the currently running strategy, your changes take effect immediately and remain in effect until the current strategy ends.
- When you modify a strategy that is not the current strategy, your changes take effect according to the scheduled times specified in the strategy.

To create or modify a team capacity strategy:

1. Open the **Routing Strategy** module and click the **Team Capacity** button on the menu bar.
2. If the scheduled team capacity strategies for the site you want to view are not currently displayed, make a selection from the **Site** drop-down list.

The team capacity strategies for the site you selected are displayed.

3. Do one of the following:
 - Click the **New Strategy** button.
 - OR -
 - Click the  button to the left of the listed strategy you want to modify or copy and select **Edit** or **Copy**


4. On the page that appears, specify the appropriate settings as described in the following table.

Setting	Description
General Settings	
Name	Enter a descriptive name for the strategy, such as <i>US Holiday</i> or <i>Weekends</i> .
Strategy Description	Enter a description for the strategy.
Default	Select Yes if you want this to be the default team capacity strategy for this site. A strategy that is <i>not</i> flagged as default overrides the default strategy and is used as an exception to the default schedule. The system first checks for a strategy that is <i>not</i> flagged as default, and if none exists, the default strategy is used. If no team capacity strategy exists for a team, the system uses the capacity value provisioned for the team.
Status	Select Active if you want the strategy to become effective on the start date you specify in the Start Date field. Select Not Active to save the strategy for future use or as a draft to continue working on later.
Duration	
Start Date End Date	Click in each of these fields and use the calendar controls to specify the start date (the date the strategy becomes effective) and end date (the date the strategy expires).

Setting	Description
Execution Start Time of Day	Enter in 24-hour format (0000 to 2400) the time of day the strategy will start.
Execution End Time of Day	Enter in 24-hour format (0000 to 2400) the time of day the strategy will end.
Day of Week	From the drop-down list, select All Days to schedule the strategy for every day or Weekdays to schedule the strategy for Monday through Friday only. -OR- Select each icon that represents a day on which you want to schedule the strategy.
Team Capacity	
This section lists each team associated with the site along with the team status—either <i>In Service</i> or <i>Not Available</i> . In the Capacity column, specify the capacity for each team of up to 10,000.	

5. Click **Save** (if you are creating a new strategy) or **Update** (if you are modifying a strategy).


Deleting a Scheduled Team Capacity Strategy

 **Caution:** When you delete a current team capacity strategy, the next strategy scheduled for that time period is activated. Do not delete a current team capacity strategy unless an alternate one has already been created.

To delete a team capacity strategy:

1. Open the **Routing Strategy** module and click the **Team Capacity** button on the menu bar.
2. If the strategies for the site you want to view are not currently displayed, make a selection from the **Site** drop-down list.

The team capacity strategies for the site you selected are displayed.

3. Click the  button to the left of the listed strategy you want to delete and select **Delete**.

Specifying Queue Precedence

The queue precedence function allows you to assign the order in which calls are routed from queues to teams, on a per-team basis. For example, suppose that *TeamA* can take calls from queues *Billing* and *Sales*. You could use queue precedence to assign a higher priority to the Billing queue, so when calls come in to the queues, those from Billing will be routed to TeamA ahead of those from Sales.

If you assign a priority only to some of the queues, calls in those queues will take precedence over calls in the queues for which no priority is specified.

Note: This is an optional feature; you do not have to set up queue precedence for teams.

To set up a team routing scenario:

1. Open the **Routing Strategy** module and click the **Queue Precedence** button on the menu bar.

The Team Routing page appears, displaying a list of all queues belonging to the enterprise.

2. Select a team from the **Select Team** drop-down list, which includes the names of all teams belonging to the enterprise.

The current queue priorities for the selected team are displayed in the Priority column.

3. Assign a priority to as many queues as you want. A priority of 1 is highest. Queues for which no priority value is specified have the lowest priority.

To assign a priority to a queue, click in the **Priority** field for the queue and enter a number in the text box that appears. Then click the check mark button beneath the text box.

To delete an assigned priority, click in the Priority field for the queue and then click the delete button that appears beneath the text box.

4. Click **Save** to save changes, which become effective immediately.

Audio on Hold

When a call is queued on the CC-One network, an audio file continues to play until the call is distributed to a team with available capacity. If the call is queued for longer than the length of the audio content, the audio file loops back and restarts from the beginning.

BroadSoft recommends that the audio file include a brief delay message followed by music. The message should announce the name of the associated queue, instruct the caller to hold for the next available agent, and include a warning that calls may be monitored.

You can record one audio file for each strategy, so the message can vary by time of day, day of week, holiday schedule, and other factors.

Creating Audio-on-Hold Files

BroadSoft recommends using the Goldwave Digital Audio Editor to create and manipulate .wav files to use for audio on hold. This editor can be downloaded from:

<http://www.goldwave.com/release.php>

You can splice the voice prompt content to the front of the music file using the Goldwave application by copying the entire voice waveform and pasting it into the beginning of the music file. Because the file will loop back to the beginning, make sure that the length of the music is sufficiently long to avoid annoying repetition.

You can also use the Goldwave application to convert music from MP3 or other formats. Be sure to comply with copyright laws. Use the following file format and settings:

wav: u-Law, mono 8.000 kHz.

Give the audio-on-hold file a name that does not exceed 23 characters, including the extension. Otherwise, you will not be able to upload the file to the CC-One system.

Implementing Audio on Hold

To implement audio on hold:

1. Upload audio files as described in “[Uploading a Resource File](#)” on page 77.
2. Create a routing strategy that uses the audio file (see “[Creating a Routing Strategy](#)” on page 89).
3. Make a test call to ensure that the appropriate audio file is played when your call is queued.

... 4

Real-Time Reports

The CC-One solution enables real-time statistics and key performance indicators to be displayed across a network of distributed call center sites and diverse technologies. This chapter describes the real-time data elements that are available from the Real-Time Reports module and explains how to view, create, and modify real-time reports, log out an agent, download report data to a data-analysis tool, and customize the ticker, which displays status information at the top of Real-Time Reports pages.

Note: Some of the real-time data elements described in this chapter are not available in a system where calls are serviced by proxy queues.

Topics covered in this chapter:

- [Real-Time Reports Overview](#)
- [Showing and Hiding Report Panels](#)
- [Sorting, Reordering, and Navigating Report Grids](#)
- [Viewing Real-Time Call Activity](#)
- [Viewing Real-Time Agent Activity](#)
- [Viewing Multiple Real-Time Chart Reports](#)
- [Modifying a Real-Time Report](#)
- [Deleting a Real-Time Report](#)
- [Printing a Report](#)
- [Exporting Report Data](#)
- [Monitoring Threshold Alerts](#)
- [Working with the Ticker](#)

See also:

- [“Provisioned Items Reports” on page 379](#)
- [“CC-One Report Parameters” beginning on page 427](#)

Real-Time Reports Overview

The CC-One Real-Time Reports module provides access to real-time statistics and key performance indicators that you can view online through a Web browser or download to a data analysis tool such as Microsoft Excel.

Report Formats

Real-time call and agent reports are displayed in two formats:

- **Snapshot reports** display current call center activity. The data is refreshed every 10 seconds. For details, see [“Call Snapshot Report Parameters” on page 151](#) and [“Data Available in Agent Snapshot Reports” on page 174](#).
- **Interval reports** display cumulative and derived values. The data is displayed in half-hour segments since midnight; the data for the current 30-minute time interval is displayed in five-minute segments. For details, see [“Call Interval Report Parameters” on page 153](#) and [“Displaying a Real-Time Agent Interval Report” on page 191](#).

Canned Reports and Tickers

The Real-Time Reports and Historical Reports modules provide a set of canned reports, which allow you to see real-time data when you first open the module. There is also a set of canned tickers that display real-time information in the ticker on pages in the Real-Time Reports module. If you are unsure whether a report or ticker is canned, check the description in the list of reports that is displayed when you access a *Customize Report* page.

A few things to note about canned reports and tickers:

- You cannot edit or delete canned reports or tickers; you can only copy them.
- Although a canned report acts as a default report when you open the module, note that the value in the Default column for the canned report is *Na*. This is done so that you can assign the default value to a report of your choosing.
- To override the default canned report or ticker, create a new report or ticker, select **Set as Default**, and then log out and log in again to see the change.

Showing and Hiding Report Panels

Real-time and historical report View pages display three report panels that can be expanded and collapsed:

- The Report Filter panel on the left displays controls for selecting report parameters. Click the ☰ button on the left side of the menu bar to collapse and expand the panel.
- The top report panel displays a chart of the report data; the lower panel displays data in a grid format. Click the expand ↗ button in the upper-right corner of a Chart or Grid panel to maximize the panel so it occupies the entire report space. Then you can click the compress ↖ button to restore the panel to its previous size.

The screenshot shows the Broadsoft interface for a 'Call Interval Entry Point Report'. On the left is the 'Report Filter' panel with various controls. The main area is titled 'Call Interval Entry Point Report' and contains a 'Chart' and a 'Grid'. The chart displays 'New' counts for 'EP_Outdial_ccg' over time. The grid below the chart shows a summary of the data.

Entry Point	Time	Total	New	From Entry Point	Transferred In	IVR Ended
Total		103	103	0	0	0
EP_Outdial_ccg	23:30-00:00	3	3	0	0	0
EP_Outdial_ccg	00:00-00:30	3	3	0	0	0

Sorting, Reordering, and Navigating Report Grids

Topics covered in this section:

- [Sorting the Data in a Grid](#)
- [Reordering Columns in a Grid](#)
- [Using the Controls at the Bottom of a Grid](#)

Sorting the Data in a Grid

You can change the sort order of the data in a report grid by performing simple or multicolumn sorts.

To sort by a single column:

- Click a column header. Click it again to reverse the sort order.

To sort by multiple columns:

- Sort by the first criterion by clicking a column header. Then hold down the CTRL key on your keyboard while you click a second heading. Repeat this process until you have sorted by as many columns as needed.

When you select a column to sort by, an arrow appears next to the column header to indicate the direction of the sort order. A number appears next to the arrow, indicating whether this is the first, second, or subsequent criterion for ordering the data.

Reordering Columns in a Grid

You can reorder columns in a CC-One report grid by holding down the mouse button on a column header and dragging the column to the right or left. Note that in most reports, you cannot move the first column.

Using the Controls at the Bottom of a Grid

The following controls are displayed at the bottom of the grids available in several CC-One modules. Use them to quickly navigate through a multipage report, reload the current page, and collapse or expand rows in the grid. After you click the collapse button, it becomes an expand button displaying a plus sign (+).



Viewing Real-Time Call Activity

Topics covered in this section:

- [Call Snapshot Report Parameters](#)
- [Differences Between Queue-Level versus Site and Team-Level Data in Reports](#)
- [Call Interval Report Parameters](#)
- [Displaying a Call Snapshot Report](#)
- [Displaying a Call Interval Report](#)
- [Creating a Custom Call Interval Report](#)
- [Creating a Custom Call Snapshot Report](#)
- [Specifying a Different Default Real-Time Call Report](#)

See also [Sorting](#), [Reordering](#), and [Navigating Report Grids](#).

Call Snapshot Report Parameters

You can display snapshot reports for one or more entry points or queues. If your enterprises uses the optional skills-based routing feature, you can also display snapshot reports for skills by queue, which shows call data based on the skill requirements assigned to the calls within each queue covered in the report.

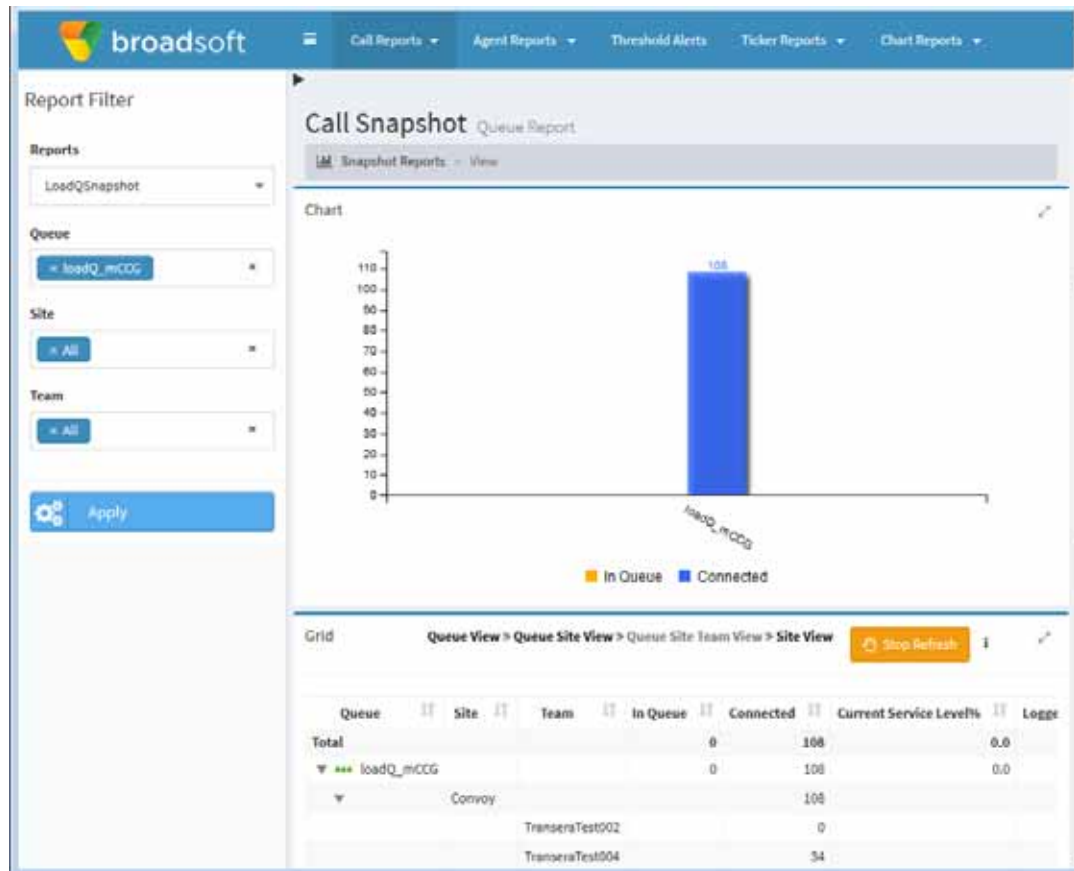
The data is refreshed every 10 seconds, but you can use the **Stop Refresh** button to prevent the data from being refreshed during the current session.

The following parameters are displayed in call snapshot reports:

Parameter	Description	Entry Point Report	Queue Report	Skills Report
Entry Point	The name of an entry point.	X		
Queue	The name of a queue		X	X
Site	The name of a site.		X	
Team	The name of a team.		X	
Skill	The name of a skill.			X
In IVR	The number of calls that are currently in the IVR system.	X		

Parameter	Description	Entry Point Report	Queue Report	Skills Report
In Queue	<p>The number of calls currently in the queues that are covered in the report. In the case of entry-point reports, this is the number of calls that are currently in queues fed by the entry point.</p> <p>In entry point and queue reports, you can click a number in this column to display the <i>Age of Calls in Queue</i> pie chart in a pop-up window. The chart displays the number of calls that have been in the queue for the length of time represented by three time segments. The time segments are derived by dividing the <i>Longest Time in Queue</i> value by three, rounding the resulting value down to the nearest 10 seconds, and then multiplying that value by 1, 2, and 3. For example, if the Longest Time in Queue value is 85 seconds, then $85/3=28.3$, which is rounded down to 20, and the chart displays time segments of 20, 40, and 60 seconds.</p>	X	X	X
Connected	The number of calls currently connected to an agent.	X	X	X
Current Service Level %	<p>The percentage of calls in queue that have not yet reached the Service Level threshold provisioned for the queue (in a queue report) or skill (in the skill rows of a skills-by-queue report).</p> <p>Note that although this metric is visible for outdial calls, it is not meaningful for such calls.</p>		X	X
Logged-in Agents	The number of agents who are currently logged in to this team or to all teams at this site. At the queue level, this is the number of agents logged in to all teams at the sites serving this queue.		X	
Available Agents	The number of logged-in agents who are currently in the Available state.		X	
Longest Call In Queue Time	The longest amount of time a call has been in each queue covered in the report.	X	X	X

Following is an example of a call snapshot report for a queue.



Call Interval Report Parameters

Note: Because some report parameters are not meaningful for outdial calls, BroadSoft recommends that you view inbound and outdial call activity separately.

Call interval reports display data in half-hour segments since midnight at the entry-point, queue, site, or team level. If your enterprise uses the optional skills-based routing feature, you can also display call data based on the skill requirements assigned to the calls within each queue covered in the report.

In a call interval report, data for the current 30-minute time interval is displayed in five-minute segments.

Topics covered in this section:

- [Real-Time and Historical Parameters for Entry Points](#)
- [Real-Time and Historical Parameters for Queues, Sites, and Teams](#)

Real-Time and Historical Parameters for Entry Points

The following parameters are available for display in real-time call interval reports and historical reports for entry points.

Category	Parameter	Description
Summary	Entry Point	The name of an entry point.
	Time	The time interval.
	Date	The date (appears only in historical reports).
Origination	Total	The total number of calls that came in to this entry point from all sources (external calls, transferred calls, and calls from other entry points).
	New	The number of external calls that came in to the entry point.
	From Entry Point	The number of calls that came in to this entry point from another entry point.
	Transferred In	The number of calls that were transferred to this entry point by an agent.
Termination	IVR Ended	The number of calls that ended in the IVR but were not short calls.
	Short	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being distributed to a destination site or connected to an agent.
	To Entry Point	The number of calls that were transferred to another entry point.
	To Queue	The number of calls that were sent to a queue.
Durations	IVR Time	The cumulative amount of time calls were in the IVR system.
Averages	Avg IVR Time	The total amount of time that calls were in the IVR system divided by the total number of calls that were in the IVR system.

Real-Time and Historical Parameters for Queues, Sites, and Teams

The following parameters are available for display in real-time call interval reports for queues, including skills by queue, and in historical call reports for queues. Asterisks (*) mark parameters that are also available in site-level and team-level reports.

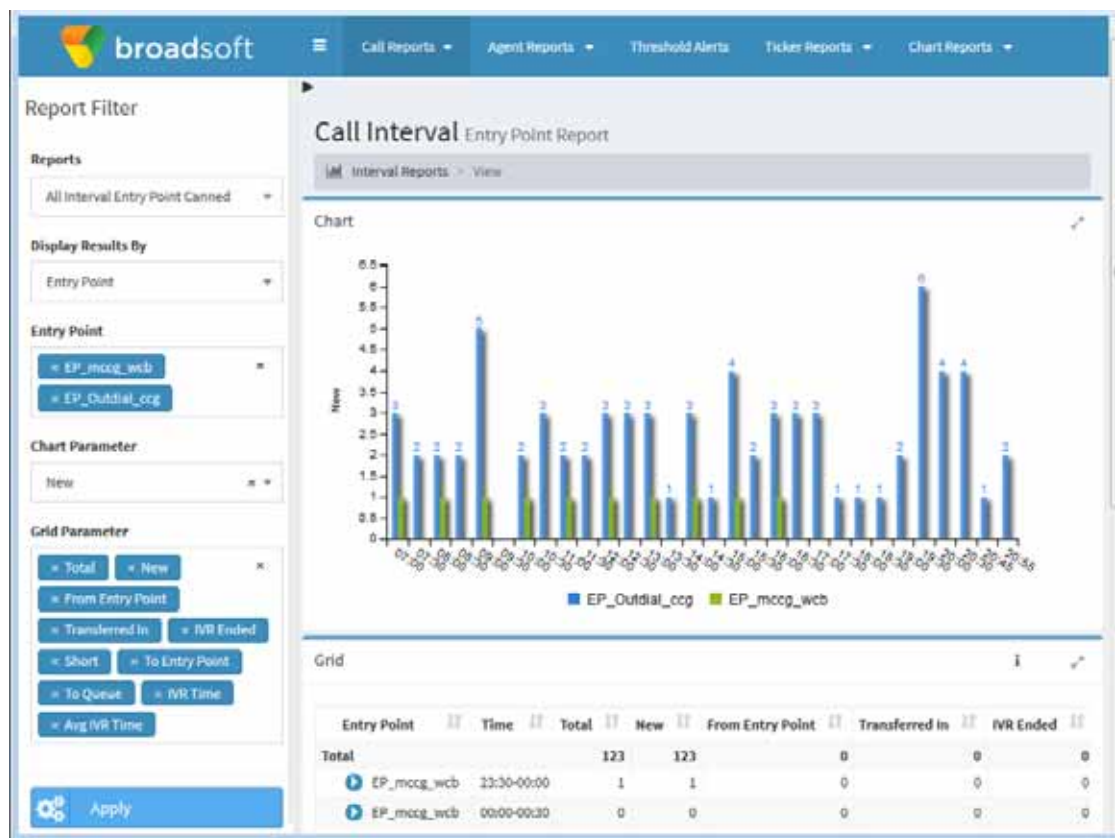
Category	Parameter	Description
Summary	Queue*	The name of a queue.
	Site*	The name of a site (appears only in site-level and team-level reports).
	Team*	The name of a team (appears only in team-level reports).
	Skill	The name of a skill (appears only in skills by queue reports).
	Time*	The time interval (appears only in real-time reports).
	Date*	The date (appears only in historical reports).
	Service Level % *	The number of calls that were answered within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100: $((\text{In Service Level})/(\text{Answered} + \text{Abandoned})) * 100$ Does not appear in site-level or team-level real-time reports. Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.
	Adjusted Service Level % *	The number of calls that were either answered or abandoned within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100. $((\text{In Service Level} + \text{Abandoned within SL})/(\text{Answered} + \text{Abandoned})) * 100$ Does not appear in site-level or team-level real-time reports. Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.
	In Service Level*	The number of calls that were answered within the Service Level threshold provisioned for this queue or skill (in a skills interval by queue report). Does not appear in site-level or team-level real-time reports. Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.
	% Answered	The number of answered calls divided by the number of calls that entered the queue minus short calls multiplied by 100. $(\text{Answered}/(\text{Answered} + \text{Abandoned})) * 100$
% Abandoned	The percentage of calls that were abandoned during the report interval. $(\text{Abandoned}/\text{Total}) * 100$	
Maximum Wait Time	The longest amount of time a call was in the queue waiting to be answered (appears only in historical reports).	

Category	Parameter	Description
Origination	Total	The total number of calls from all origination types.
	From Entry Point	The number of calls that entered this queue after being classified into the queue from an entry point by the IVR call control script.
	Transferred In	The number of calls that entered this queue after having been transferred into the queue by an agent who clicked the Queue button, selected a queue from the drop-down list, and clicked Transfer .
Termination	Completed*	The number of calls that ended during the report interval. Answered, abandoned, and disconnected calls are included in this count. Transferred and short calls are not.
	Abandoned	The number of calls that were abandoned during the report interval. An abandoned call is a call that was terminated without being distributed to a destination site, but that was in the system for longer than the time specified by the Short Call threshold provisioned for the enterprise.
	Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report). Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.
	Disconnected*	The number of calls that were answered (that is, connected to an agent or distributed to and accepted by a destination site), but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.
	Overflow	The number of calls that were sent to the overflow number provisioned for the queue and were answered. Typically, a call is sent to an overflow number if it has been queued for longer than the maximum time specified in the routing strategy or because an error occurred when the call was sent to an agent. If the call is not answered, it is included in the Abandoned or Disconnected count when it ends.
	Transferred*	The sum of all calls transferred from this queue to an agent, external DN, or another CC-One queue: Transferred Out + Requeued
	Transferred Out*	The number of calls that left this queue after having been transferred by an agent to an external DN or to another agent. Transferred out calls result when an agent clicks the Agent button, selects an agent from the drop-down list, and clicks Transfer , or when the agent clicks the DN button, enters a phone number, and clicks Transfer . Transferred out calls may begin as a consultation or conference, but will be counted as transferred out only when the first agent completes the transfer to the second party.
	Blind Transfers*	The subset of transferred out calls that were transferred by the agent to another agent or an external DN without the first agent consulting or conferencing with the party to whom the call was transferred.
	Requeued*	The number of calls that left this queue after having been transferred by the agent to another queue. For calls to be requeued, the first agent clicks the Queue button, selects a queue from the drop-down list, and clicks Transfer .

Category	Parameter	Description
Call Details	Queued	The number of calls that entered the queue during this interval.
	Answered*	The number of calls that were routed from the queue to an agent or available resource and were answered by the agent or resource.
	Secondary Answered*	The number of calls that were answered by an agent after being transferred to the agent by another agent.
	Short	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being connected to an agent.
	Consult Count*	The number of times agents initiated a consult with another agent or someone at an external number while handling a call.
	Conference Count*	The number of times agents initiated a conference call to an agent or external number.
	Hold Count*	The number of times a caller was put on hold.
	CTQ Request Count*	The number of times consult-to-queue requests were initiated.
	CTQ Answer Count*	The number of times consult-to-queue requests were answered.
Cumulative Times	CTQ Request Time*	The cumulative amount of time between when consult-to-queue requests were initiated and when the consultations ended (appears only in historical reports).
	CTQ Answer Time*	The cumulative amount of time between when consult-to-queue requests were answered and when the consultations ended (appears only in historical reports).
	Queued Time	The cumulative amount of time calls were in queue, waiting to be sent to an agent or other resource. Because queued time is calculated after the call leaves the queue, the queued time for a call that is still in the queue is not reflected in the report.
	Answered Time*	The cumulative amount of time between when calls entered the queue and when they were answered (connected to an agent or other resource) during the report interval. Because answered time is calculated after the call is answered, answered time for calls that are waiting to be answered is not reflected in the report.
	Abandoned Time	The cumulative amount of time calls were in the system for longer than the time specified by the Short Call threshold, but terminated before being distributed to an agent or other resource.
	Connected Time*	The time interval between when calls were answered by an agent or other resource and when they were terminated. Because connected time is not calculated until the call is terminated, the connected time for a call that is still in progress is not reflected in the report.
	Wrap Up Time*	The cumulative amount of time agents spent in the Wrap-up state after handling the calls.
	Handle Time*	The cumulative amount of time spent handling calls: Connected Time + Wrap Up Time

Category	Parameter	Description
Averages	Avg Queued Time	The total amount of time that calls were in queue divided by the total number of calls that were queued: Queued Time/Queued
	Avg Abandoned Time	The total amount of time that calls were in the system before they were abandoned divided by the total number of calls that were abandoned: Abandoned Time/Abandoned
	Avg Connected Time*	The total connected time divided by the total number of calls that were answered during the report interval: Connected Time/(Answered + Secondary Answered)
	Avg Wrap Up Time*	The total amount of time agents spent in the Wrap-up state divided by the total number of answered calls: Wrap Up Time/(Answered + Secondary Answered)
	Avg Handle Time*	The average length of time spent handling a call (connected time plus wrap-up time), divided by number of answered calls: Connected Time+Wrap Up Time/(Answered + Secondary Answered)
	Avg Speed of Answer*	The total answered time divided by the total number of answered calls: Answered Time/Answered

An example of a real-time call interval report is shown in the following illustration.



Differences Between Queue-Level versus Site and Team-Level Data in Reports

For some metrics, call reports show different values at the queue level than are shown for the total of all sites or teams that serve that queue. This is due to calls that are transferred to parties outside the CC-One system. Such transferred calls continue to accumulate connected time that is not associated with a CC-One site or team, but is still attributed to the queue-level report. Thus, any metric that is derived from the connected time (namely, handle time and the associated averages) will be different at the queue level than at the site or team level if external transfers are performed.

If you want to consider connected time by CC-One resources only as handle time, you should use the site-level metrics. Alternatively, you should use the queue-level metrics if you want to consider the connected time for the entire call, even after an agent transfers it to an external number.

Displaying a Call Snapshot Report

You can display call snapshot reports for entry points or queues. If your enterprise uses the optional skills-based routing feature, you can also display call data based on the skill requirements assigned to the calls within each queue covered in the report.

- In a snapshot report for an entry point, you can drill down to display data about a queue serving that entry point.
- In a snapshot report for queues, you can display data for queues, sites and teams, or you can collapse and expand the report to display only queue-level data, or only queue-level and site-level data, or only site-level data.

To display a call snapshot report:

1. Open the **Real-Time Reports** module.

The default call snapshot report is displayed. For a description of each parameter, see [“Call Snapshot Report Parameters” on page 151](#).

2. To display a different report, select an entry from the **Reports** drop-down list on Report Filter panel.

3. To display an ad hoc report, select report parameters from the Report Filter panel on the left, and then click **Apply**.
 - For an entry point report, make sure an entry point report is already displayed, and then select one or more entry points from the Report Filter panel.
 - For a queue report, make sure a queue report is already displayed, and then select one or more queues, sites, and teams from the Report Filter panel.
 - For a skills report, make sure a skills by queue report is already displayed, and then select one or more queues and skills from the Report Filter panel.

Note: If the Report Filter panel is not already displayed, click the ☰ button on the left side of the menu bar. See [“Showing and Hiding Report Panels” on page 149](#) for more information.

4. To prevent the data in the grid from being updated every 10 seconds during the current session, click the **Stop Refresh** button on the **Grid** panel header. The button changes to **Start Refresh** so you can restart the data update process.
5. To change the sort order in the grid, click a column header to sort the data by that column, and click it a second time to reverse the sort order. To sort by additional columns, hold down the CTRL key while you click a second and subsequent headings.
6. In a snapshot report for queues, click one of the following links on the Grid panel header to reduce or increase the level of data in the report.

This Link	Does This
Queue View	Shows only queue-level data, and hides site-level and team-level data.
Queue-Site View	Shows only queue-level and site-level data, and hides team-level data.
Queue-Site-Team View	Shows queue-level, site-level, and team-level data.
Site View	Shows only site-level data: Connected, Logged-in Agents, and Available Agents.

Click these links to collapse and expand the data in the report so that it shows only queue-level data, or only queue-level and site-level data, or only site-level data.

Select report parameters from the Report Filter panel... .. and then click Apply.

Rest the cursor over a bar to display a description of the data represented by the bar.

Queue	Site	Team	In Queue	Connected	Current Service Level%	Lo
Total			1	2	100.0	
loadQ_SBR			1	2	100.0	
	Chicago			0		
		TelstraTest001		0		

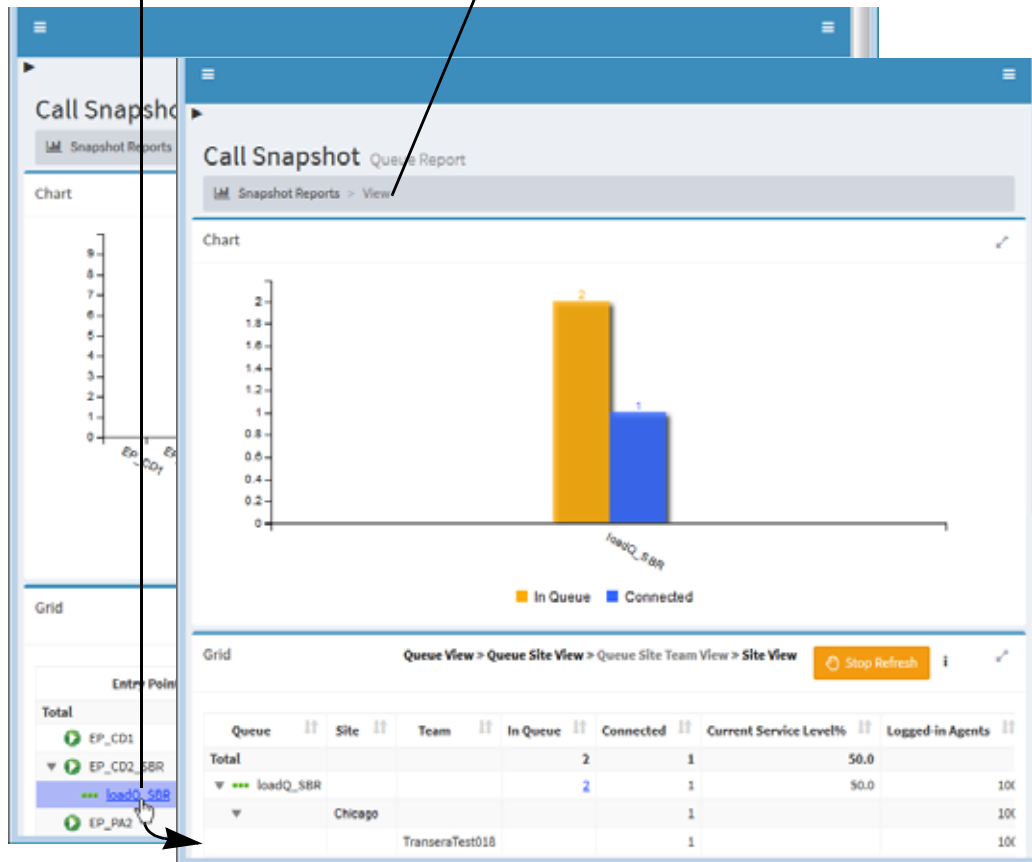
Click a link in this column to display the Age of Calls in Queue pie chart.

Click Stop Refresh to prevent data in the table from being updated every 10 seconds.

As shown in the next illustration, in a snapshot report for entry points, you can drill down from an entry point to a queue by clicking the name of a queue. Then you can return to the previous view by clicking the **Entry Point View** link in the report title bar.

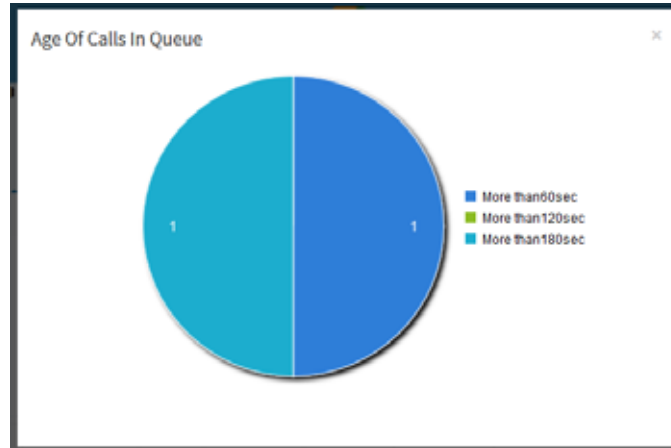
Click the name of a queue in an entry point report to display the Queue view...

... then you can click this link to return to the Entry Point view.



7. In an entry point or queue snapshot report, you can click a value in the **In Queue** column to display the *Age of Calls In Queue* pie chart in a pop-up window.

This chart displays the number of calls that have been in the queue for the length of time represented by three time segments. The time segments are derived by dividing the *Longest Time in Queue* value by three, rounding the resulting value down to the nearest 10 seconds, and then multiplying that value by 1, 2, and 3. For example, if the *Longest Time in Queue* value is 85 seconds, then $85/3=28.3$, which is rounded down to 20, and the chart displays time segments of 20, 40, and 60 seconds. In the following illustration, the longest time in queue is 156 seconds, so the chart displays time segments of 50, 100, and 150 seconds.



Displaying a Call Interval Report

To display a call interval report:

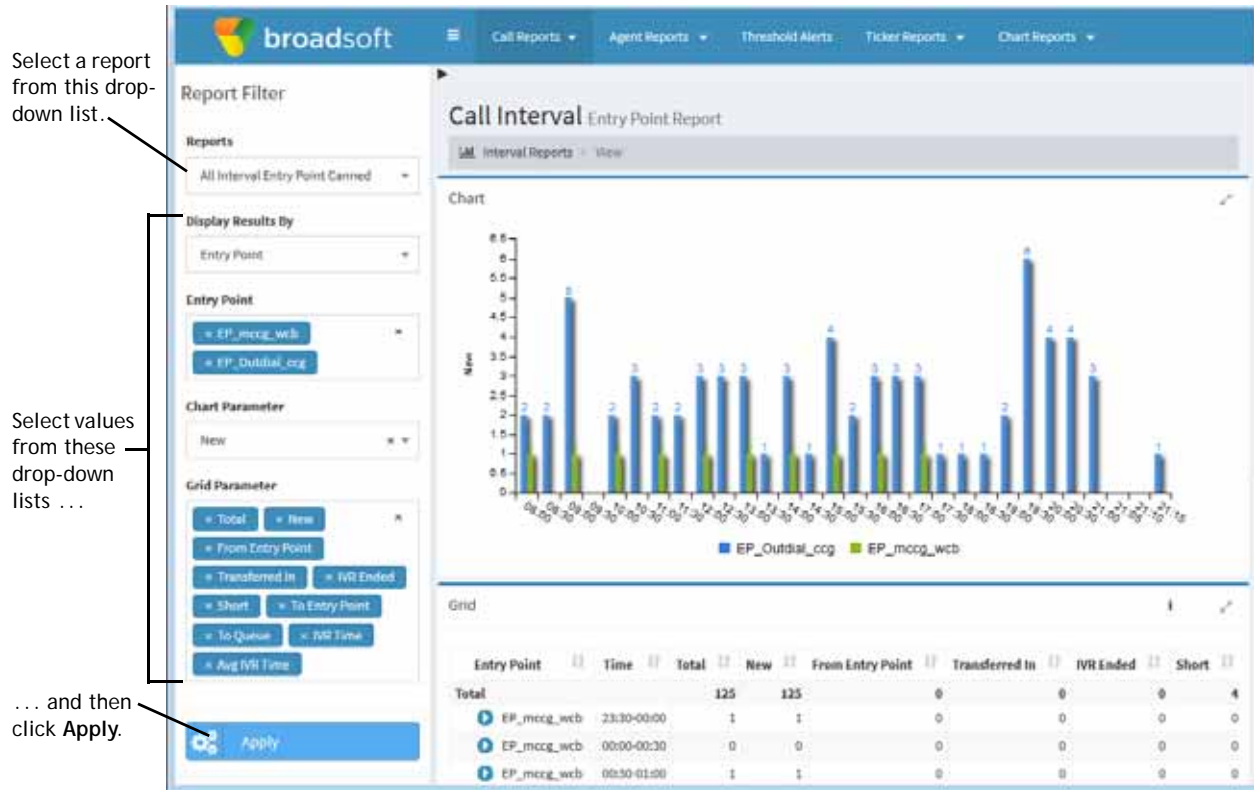
1. Open the **Real-Time Reports** module.

The default call snapshot report is displayed.

2. Click the **Call Reports** button on the menu bar and select **View Interval Reports** from the drop-down list.

A default interval report is displayed.

3. To change the sort order in the grid, click a column header to sort the data by that column, and click it a second time to reverse the sort order. To sort by additional columns, hold down the CTRL key while you click a second and subsequent headings.
4. To display a different report, make a selection from the **Reports** drop-down list.



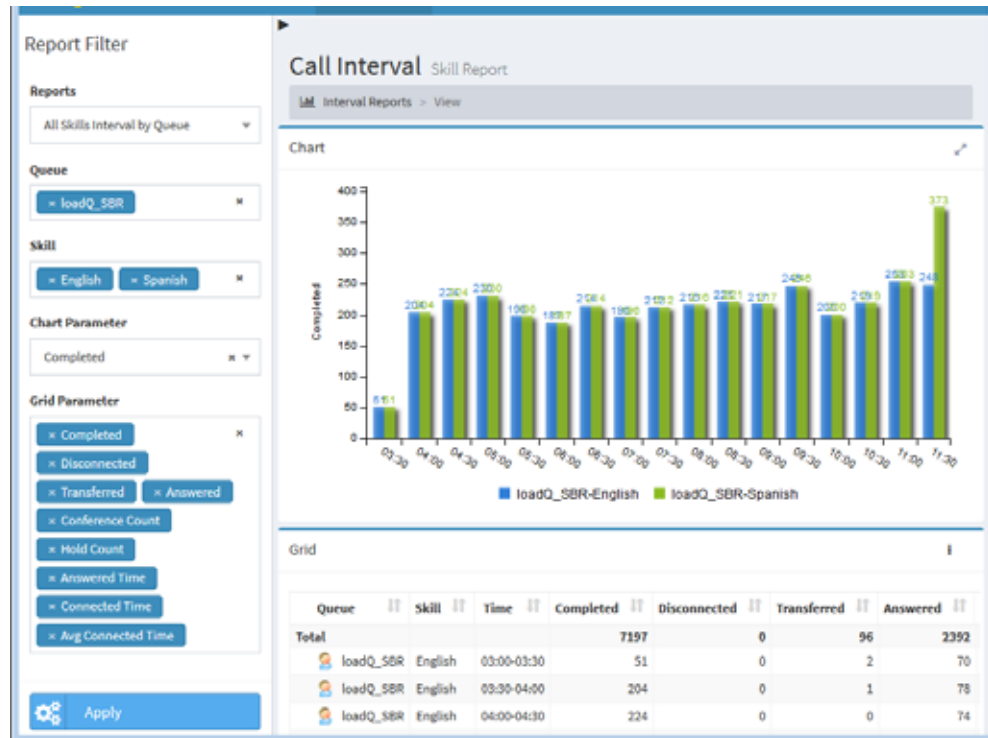
5. To display different statistics, select the settings you want from the lists in the Report Filter panel on the left side of the page:
 - a. Select a value from the **Display Results By** list to specify whether you want to display results by entry point, queue, site, or team. (This setting is not available for a skills by queue reports.)
 - b. Select the entry points, queues, sites, teams, or skills you want included in the report.
 - c. Select the parameter from the **Chart Parameter** list that you want to be displayed in the chart, and select the parameters from the **Grid Parameter** list that you want to be displayed as columns in the grid.

For an explanation of the available parameters, see [“Call Interval Report Parameters” on page 153](#).
 - d. Click **Apply**.

The report displays data since midnight in half-hour segments.

Note: If the Report Filter panel is not already displayed, click the ☰ button on the left side of the menu bar. See [“Showing and Hiding Report Panels” on page 149](#) for more information.

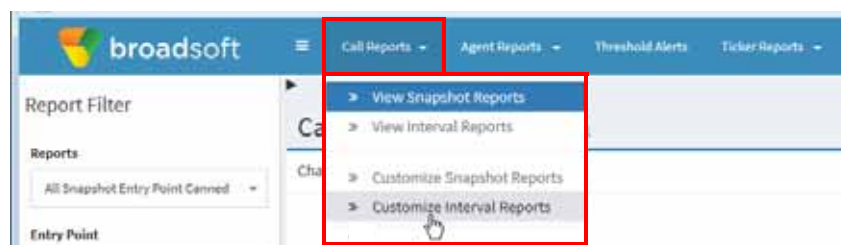
Following is an example of a skills interval by queue report.




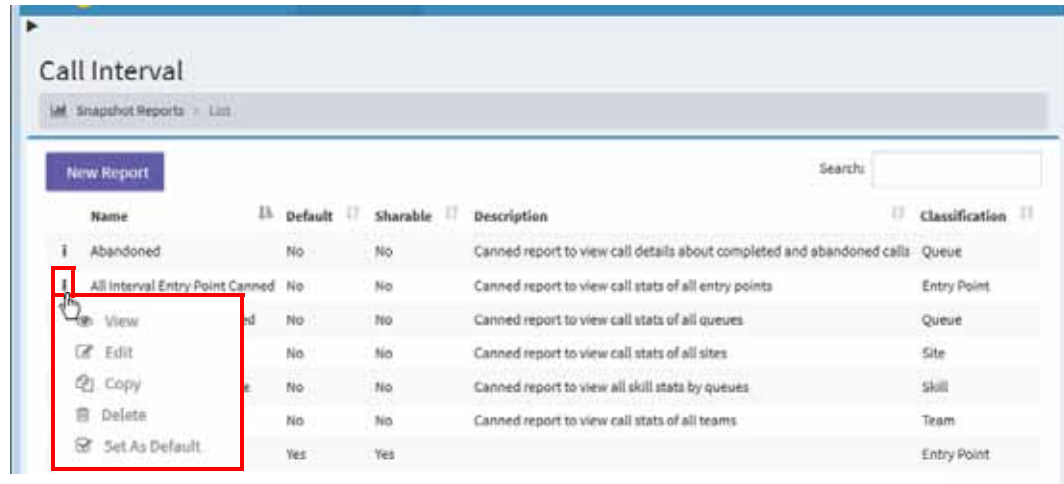
Creating a Custom Call Interval Report

To create a custom call interval report:

1. Open the **Real-Time Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Interval Reports** from the drop-down list.

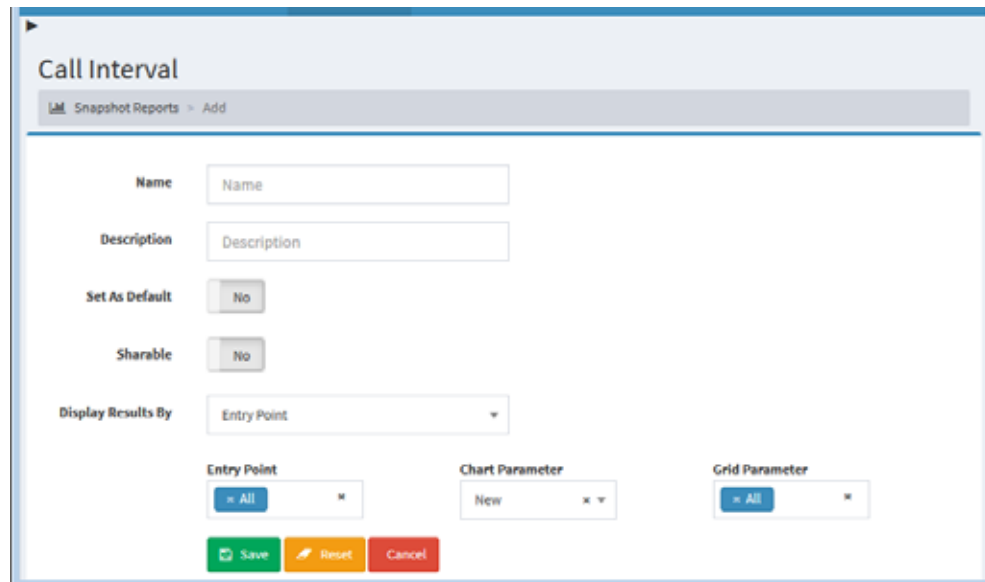


3. On the List page that appears, do one of the following:
 - Click the **New Report** button on the upper-left side of the page.
 - OR-
 - To copy an existing report, click the  button to the left of a listed report and select **Copy** from the drop-down list.



4. On the Add page that appears, specify the settings for the report as described in the following table, and then click **Save**.

After the new report is saved, it will be available for selection from the Reports drop-down list on the Call Interval Reports page and will be listed in the Customize Interval Reports page with your login name displayed in the *Created By* column.




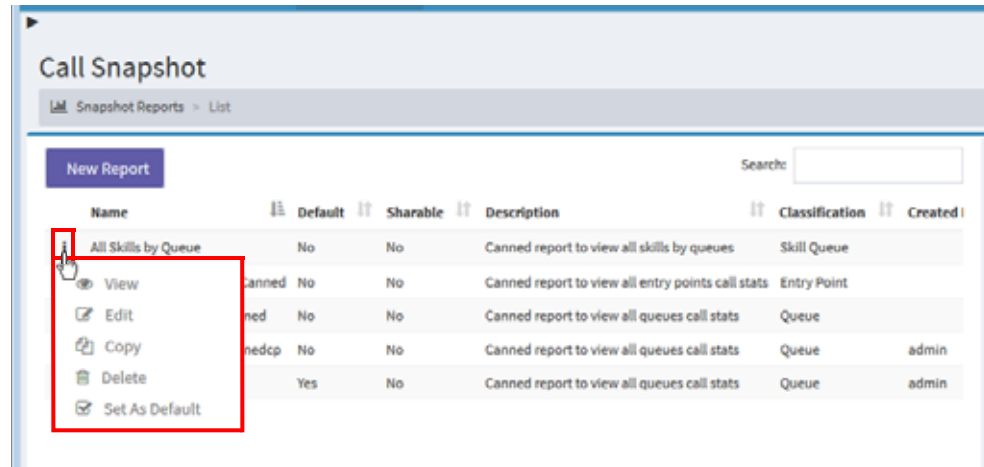
Setting	Description
Name	Enter a name for the report.
Description	Optionally, enter a short description of the report.

Setting	Description
Set as Default	Select Yes if you want this report to be displayed the next time you click the View Interval Reports link. For CC-One Management Portal users, the default report is also displayed on the Portal home page. Note: You must log out and log in again for the new default to take effect.
Sharable	Select Yes if you want everyone who has access to the CC-One Real-Time Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by entry point, queue, site, team, or skill queue.
Chart Parameter	Select the single parameter that you want displayed in the report chart.
Grid Parameter	Select the parameters that you want displayed as columns in the report grid. For an explanation of the available parameters, see “Call Interval Report Parameters” on page 153.

Creating a Custom Call Snapshot Report

To create a custom call snapshot report:

1. Open the **Real-Time Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Snapshot Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
 - Click the **New Report** button on the upper left side of the page.
 - OR-
 - To copy an existing report, click the  button to the left of a listed report and select **Copy** from the drop-down list.



4. On the page that appears, select the **Entry Point**, **Queue**, or **Skill** button to specify the type of report you want to create.
5. Enter a name and, optionally, a description for the report in the **Name** and **Description** fields.
6. Do one of the following:
 - If you are creating an entry point report, select one or more entry points you want the report to include.
 - If you are creating a queue report, select one or more queues, sites, and teams you want the report to include.
 - If you are creating a skill report, select one or more queues and skills you want the report to include.

The settings available for a queue snapshot report are shown in the next illustration.

7. In the **Set as Default** field, select **Yes** if you want this report to be displayed when you open the Real-Time Reports module.
8. In the **Sharable** field, select **Yes** if you want everyone who has access to the CC-One Real-Time Reports module to be able to see the report.
9. Click **Save**.

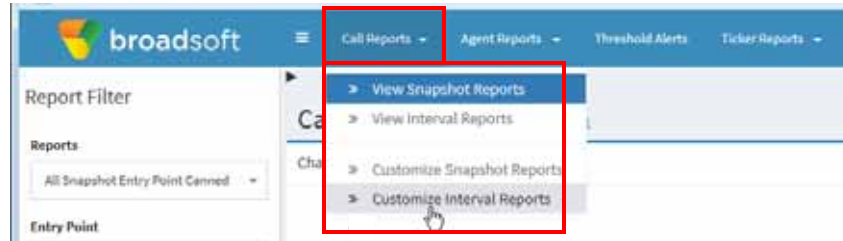
After it is saved, the new report will be available for selection from the Reports drop-down list on the View Snapshot Reports page and will be listed in the Customize Snapshot Reports page with your login name displayed in the *Created By* column.


Specifying a Different Default Real-Time Call Report

When you open the Real-Time Reports module, the default call snapshot report is displayed, and when you navigate to the Interval Reports page, the default call interval report is displayed. For CC-One Management Portal users, the default interval report is also displayed on the Management Portal home page.

To specify a different default report:

1. Open the **Real-Time Reports** module.
2. Click the **Call Reports** button on the menu bar and select either **Customize Snapshot Reports** or **Customize Interval Reports** from the drop-down list.



3. On the page that appears, click the  button to the left of a listed report that is not canned and select **Set As Default**.

Note: You must log out and log in again for the new default to take effect.

Viewing Real-Time Agent Activity

Real-time agent reports are displayed in both snapshot and interval report formats. They provide information about agent activity at the site, team, and agent level as well as at the skill level (for enterprises that use the optional skills-based routing feature). In addition, you can log out an agent either from the Team view or from the Skills view of the agent snapshot report.

Topics covered in this section:

- [Displaying Agent Snapshot Reports](#)
- [Data Available in Agent Snapshot Reports](#)
- [Logging Out an Agent](#)
- [Creating a Custom Agent Snapshot Report](#)
- [Specifying a Different Default Agent Snapshot Report](#)
- [Displaying a Real-Time Agent Interval Report](#)

See also “[Sorting, Reordering, and Navigating Report Grids](#)” on page 150.

Displaying Agent Snapshot Reports

Agent snapshot reports provide detailed information about all agent activity at the site level. You can drill down through the information to view agent activity at the team and agent level. To view agent activity for multiple teams, create a custom multi-team report (see “[Creating a Custom Agent Snapshot Report](#)” on page 189).

If your enterprise uses the optional skills-based routing feature, you can also display real-time agent activity based on the skills the agents possess and team activity broken down by skills.

To display an agent snapshot report:

1. Open the **Real-Time Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **View Snapshot Reports** from the drop-down list.

The default agent snapshot report is displayed.

3. To display a different report, select an entry from the **Reports** drop-down list.
4. To display an ad hoc report:
 - a. Make sure the type of report you want to display is already displayed; then select parameters from the Report Filter panel. For example:
 - If the *AgentSite* report is displayed, select the sites you want the report to cover.
 - If the *All Agent Canned* report is displayed, select up to 100 agents you want the report to cover.
 - If *All Agents by Skills* report is displayed, select the skills you want the report to cover.
 - If the *All Skills by Teams* report is displayed, select the teams you want the report to cover.
 - If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.
 - b. Click **Update Report**.

Note: If the Report Filter panel is not already displayed, click the ☰ button on the left side of the menu bar. See “[Showing and Hiding Report Panels](#)” on page 149 for more information.

- To prevent the data in the grid from being updated every 10 seconds during the current session, click the **Stop Refresh** button on the **Grid** panel header. The button then changes to **Start Refresh** so you can restart the data update process.

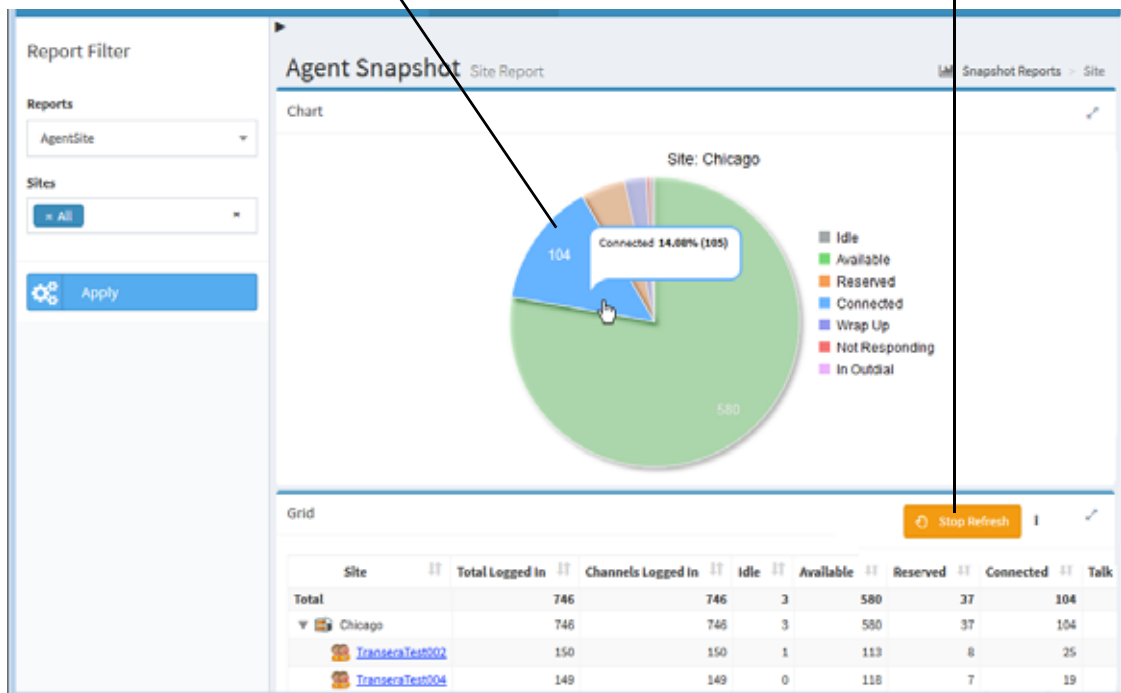
Note: The refresh interval for a multi-team report is 90 seconds.

- To change the sort order in the grid, click a column header to sort the data by that column, and click it a second time to reverse the sort order. To sort by additional columns, hold down the CTRL key while you click a second and subsequent headings.

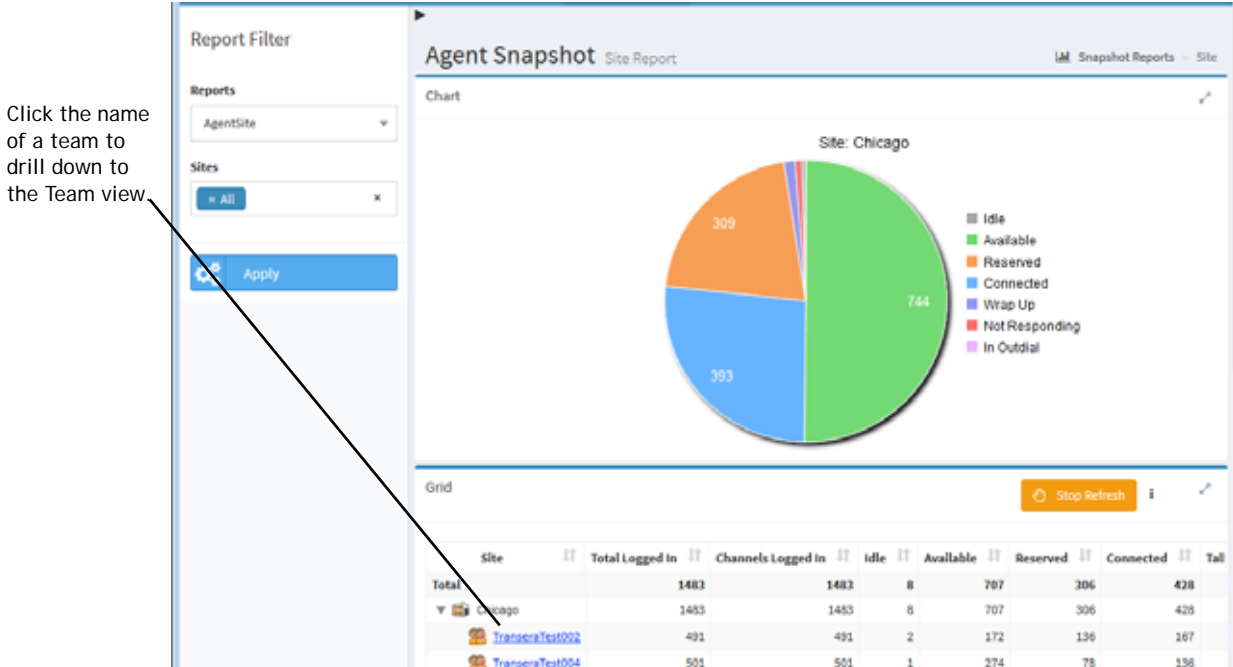
Note: You cannot change the sort order of an Action column.

Rest the cursor over a part of the chart to display a description of the data it represents.

Click **Stop Refresh** to prevent data in the table from being updated every 10 seconds.



- To drill down to the Team view, click the name of a team in the **Team** column. For more information about the Team view, see [“Team View” on page 176](#).

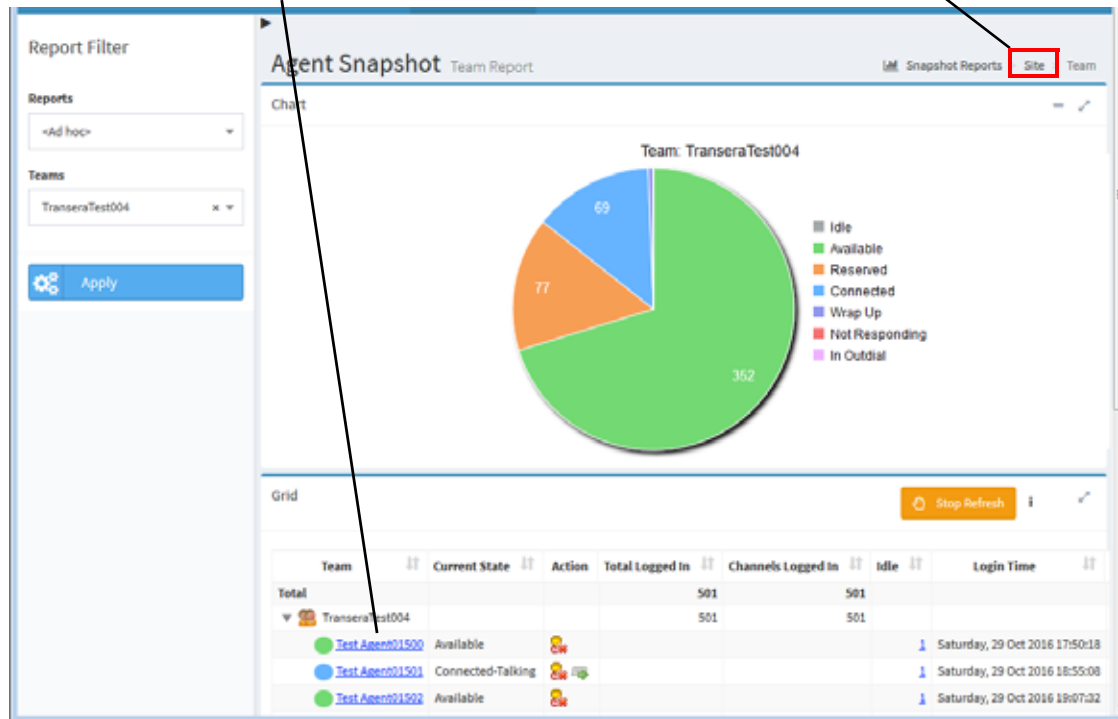


- To drill down from the Team view to the Agent view, click the name of an agent in the **Agent** column in the report grid.

The Agent view displays call data for that agent. For more information, see “Agent View” on page 179.

Click an agent name to drill down to the Agent view for that agent.

Click this link to return to the Site view.



Data Available in Agent Snapshot Reports

The following table describes the agent states that can appear in agent reports.

Agent State	Description
Available	The agent is available and waiting for calls.
Connected	The agent has picked up the phone and is connected with a caller. When the agent is in the Connected state, the agent's sub-state is also displayed— <i>Connected-on-hold</i> or <i>Connected-talking</i> .
Consulting	The agent is consulting with another agent.
Idle	The agent is logged in but not available for a specified reason (for example, lunch break, meeting).
Not Responding	The phone rang but was not answered within a specified period of time. The call is routed to another agent. An agent who is in this state must manually click the Available button to get out of this state.
Outdial Connected	The agent is connected to an outdial call (a call made from the CC-One Agent Desktop by entering a phone number in the Call Out field). When the agent is in the Outdial Connected state, the agent's sub-state is also displayed— <i>Outdial-Connected-on-hold</i> or <i>Outdial-Connected-talking</i> .
Reserved	A call is coming in to the agent's station but the agent has not yet answered it.
Outdial Reserved	The agent has initiated a call, but the call is not connected yet.
Wrap Up	The call has ended but the agent is not ready for the next call.

In agent snapshot reports, you can drill down through three views to display the data described in the following topics:

- [Site View](#)
- [Team View](#)
- [Agent View](#)

In addition, if your enterprise uses the optional skills-based routing feature, you can display real-time agent reports from the skills point of view. The following topics describe the available data:

- [Skill View](#)
- [Skills by Team View](#)

Site View

The Site view displays agent-state data for the teams assigned to the sites covered by the report.

The report chart displays a pie chart of agent activity at one of the sites in the report. If the report covers more than one site, the chart displays data for the site listed first in the report grid. The grid displays data for all sites covered in the report.

You can click the name of a team listed in the report grid to display the Team view for that team, as described in [“Displaying Agent Snapshot Reports”](#) beginning on [page 171](#).

The report grid displays the following information for each site in the report.

Column	Description
Site	<p>The name of the site.</p> <ul style="list-style-type: none"> Click a collapse arrow (▼) or expand arrow (►) next to a site name to collapse or expand the list of logged-in teams at the site. Click the name of a team to drill-down to the Team view for that team. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse or expand arrow to the left of a team name to collapse or expand the channel details.
Total Logged In	The number of agents currently logged in.
Channels Logged In	The number of media channels to which agents are currently logged in.
Idle	The number of agents currently in the Idle state.
Available	The number of agents currently in the Available state.
Reserved	The number of agents currently in the Reserved state, during which a call is coming in but has not yet been answered.
Connected	The number of agents currently connected to an inbound call.
Talk	The number of agents in the Connected state who are currently talking with a caller.
Hold	The number of agents in the Connected state who have placed the caller on hold.
Consulting	The number of agents currently consulting with another agent.
CTQ	The number of agents currently consulting with another agent after initiating or answering a consult-to-queue request.
Wrap Up	The number of agents currently in the Wrap-up state.
Not Responding	The number of agents currently in the Not Responding state.
In Outdial	The number of agents who are connected to or are wrapping up an outdial call (a call made from the CC-One Agent Desktop by entering a phone number in the Call Out field).

Team View

In the Team view, the report chart displays a pie chart of current agent activity on that team. The report grid displays the information described in the following table.

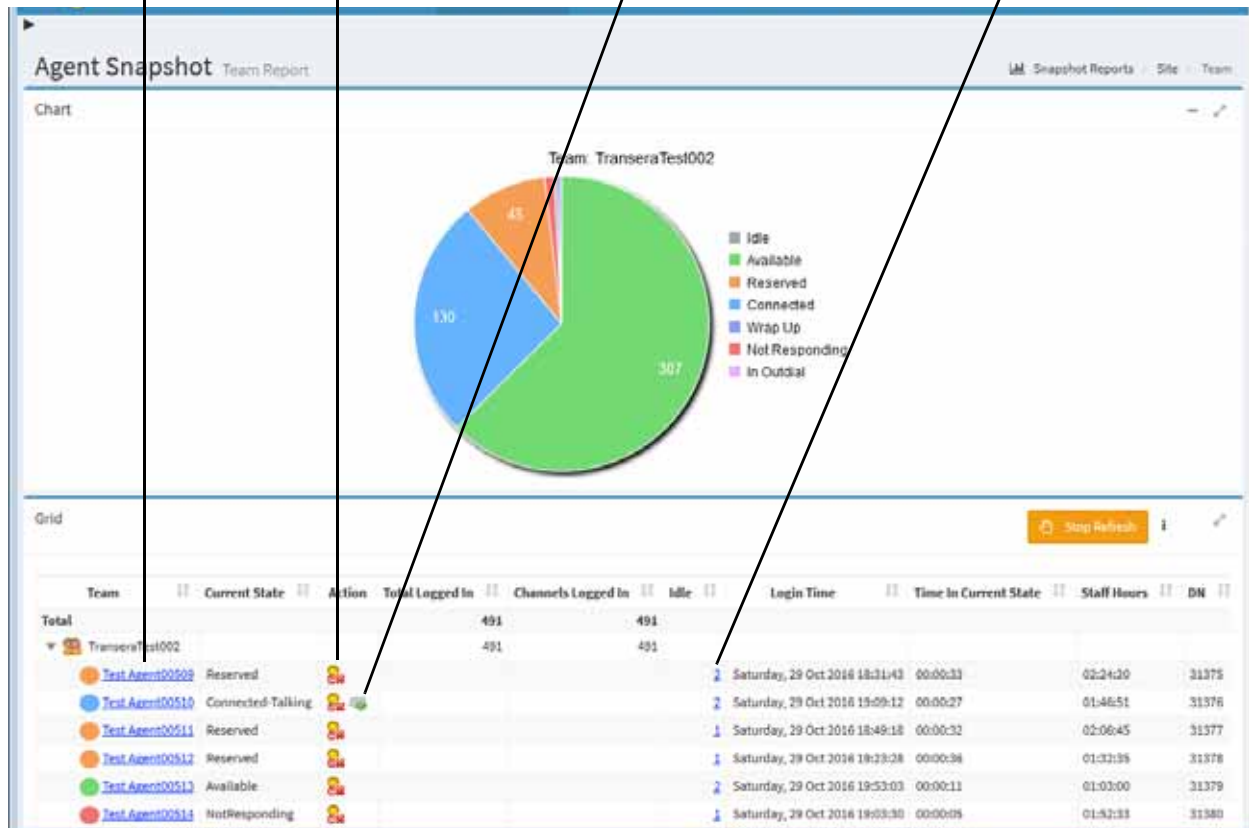
To display information for multiple teams, create a custom multi-team report (see “Creating a Custom Agent Snapshot Report” on page 189).

Click an agent name to drill down to the Agent view for that agent.



Click this icon to log out the agent.

Click this icon to monitor the agent, if authorized by your user role.

Rest the cursor over a number in the Idle column to see the idle codes the agent entered and how many times each code was entered.



Column	Description
Team	<p>The name of the team.</p> <ul style="list-style-type: none"> Click a collapse arrow (▼) or expand arrow (►) next to a team name to collapse or expand the list of logged-in agents on the team. Click the name of an agent to drill-down to the Agent view for that agent. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse or expand arrow to the left of an agent name to collapse or expand the data grouped by channel type.

Column	Description
Current State	The agent's current state. See the table on page 174 for a description of each state that can appear in this column. If the current state is Idle, the idle code the agent selected is shown in parentheses (no code is shown if the agent has just logged in and has not selected an idle code).
Action	Icons you can click to perform an action: <ul style="list-style-type: none"> Click the Logout () icon to log out the agent. For more information, see "Logging Out an Agent" on page 187. Click the Monitor () icon to open the Call Monitoring module where you can monitor the agent's call by entering your callback number and clicking the Midcall Monitor button. <p>This icon is displayed only if the agent is in the Connected state and your user role authorizes midcall monitoring. For more information, see Chapter 5, "Call Monitoring," beginning on page 207.</p>
Total Logged In	The total number of agents currently logged in.
Channels Logged In	The number of media channels to which agents are currently logged in. Appears only if your enterprise uses the Multimedia feature.
Idle	The number of times the agent went into the Idle state from a different state. Rest the cursor over a number in this column to display a pop-up showing the idle codes the agent entered and how many times each code was entered. Note: Because an agent can change the idle code while in the Idle state, the number of idle codes displayed in the pop-up can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email.
Login Time	The date and time the agent logged in.
Time in Current State	How long the agent has been in the current state.
Staff Hours	The amount of time the agent has been logged in.
DN	The dial number the agent used to log in to the Agent Desktop.
Queue	If the agent is currently handling a call, the name of the queue that the call came in on.
Calls Handled	The number of calls the agent handled since logging in. Rest the cursor over a number in this column to display a pop-up showing the wrap-up codes the agent entered and how many times each code was entered.
In Outdial	The number of times the agent was connected to or was wrapping up an outdial call.

The Team view can display activity for up to 40 agents on a page. If the report covers more than 40 agents, their activities are displayed on multiple pages that you can view by using the controls at the bottom of the report grid.

The Multi-Team view can display activity for up to 40 agents per page. Agents for a team may be split across pages.

From the Team view, you can change the report parameters to display a different team report. To do so:

1. Select the team you are interested in from the Report Filter panel and, if your enterprise uses the optional multimedia feature, select one or more media channels.

If the Report Filter panel is not already displayed, click the ☰ button on the left side of the menu bar to display it.

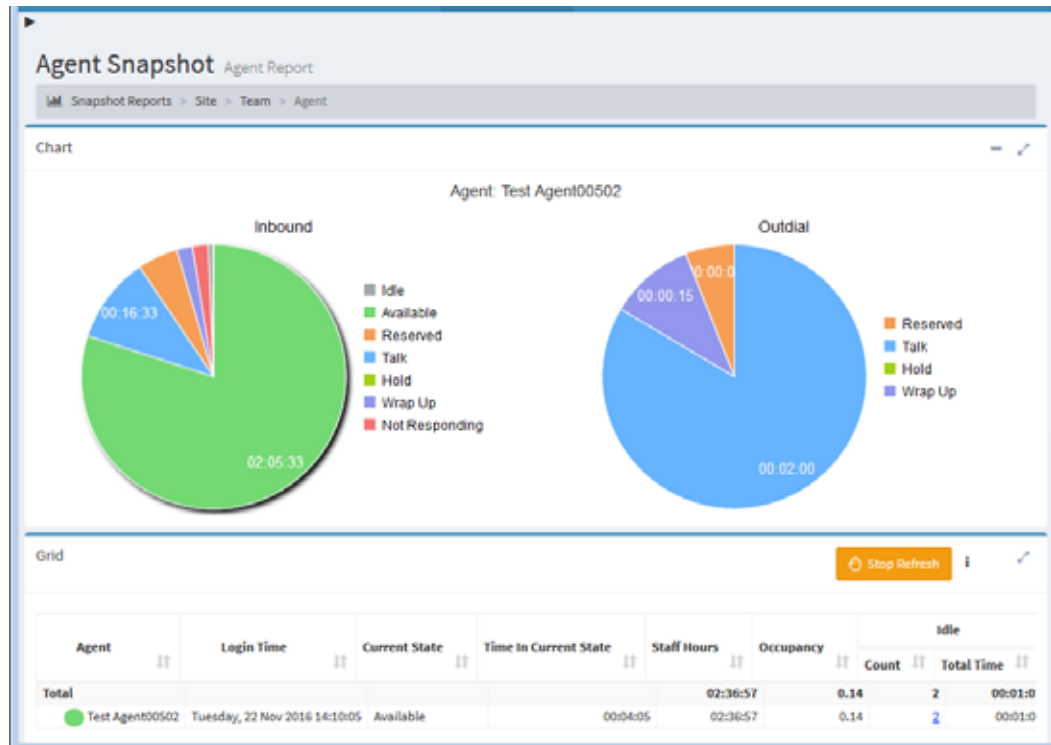
2. Click **Apply**.



Agent View

In the Agent view, the report chart panel displays two pie charts. The chart on the left shows the amount of time the agent spent in each agent state since logging in. If the agent participated in any outdial calls during the current session, the chart on the right shows the time the agent spent in each agent state during outdial calls.

If the report covers more than one agent, the chart displays data for the agent listed first in the report grid.



Click the Idle or Wrap Up segment of a pie chart to display another chart showing which codes the agent entered and how many times each code was used.

The report grid displays the following details about the activity of each agent in the report since logging in.

Column	Description
Agent	The name of an agent.
Login Time	The time the agent logged in.
Current State	The state the agent is currently in. See the table on page 174 for a description of each state that can appear in this column.
Time in Current State	The amount of time the agent has been in the current state.
Staff Hours	The amount of time the agent was logged in during this login session.

Column	Description
Occupancy	The measure of time the agent spent on calls compared to available and idle time (Total Talk Time + Total Hold Time + Total Wrap Up Time + Outdial Connected Time + Outdial Wrap Up Time divided by Staff Hours).
Idle	<p>Count. The number of times the agent went into the Idle state from a different state. Rest the cursor over the number in this field to display a pop-up showing the idle codes the agent entered and how many times each code was used.</p> <p>Note: Because an agent can change the idle code while in the Idle state, the number of idle codes can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email.</p>
	<p>Total Time. The total amount of time the agent spent in the Idle state.</p>
Available	<p>Count. The number of times the agent went into the Available state.</p>
	<p>Total Time. The total amount of time the agent spent in the Available state.</p>
Inbound Reserved	<p>Count. The number of times the agent went into in the Reserved state, during which a call was coming in but had not yet been answered.</p>
	<p>Total Time. Total amount of time the agent spent in the Reserved state.</p>
Inbound Connected	<p>Hold Count. The number of times the agent put a caller on hold.</p>
	<p>Connected Count. The number of calls the agent handled.</p>
	<p>Total Talk Time. The total amount of time the agent was talking with a caller. This does not include hold time.</p>
	<p>Total Hold Time. The total amount of time inbound calls were on hold.</p>
	<p>Total Time. The amount of time inbound calls were connected to an agent during the time interval (talk time plus hold time)</p>
Outdial Reserved	<p>Count. The number of times the agent went into in the Outdial Reserved state, indicating that the agent has initiated an outdial call but the call is not connected yet.</p>
	<p>Total Time. The amount of time the agent spent in the Outdial Reserved state.</p>

Column	Description
Outdial Connected	Attempted Count. The number of outdial calls the agent made.
	Connected Count. The number of outdial calls the agent made that were answered.
	Hold Count. The number of times an outdial call made by the agent was put on hold.
	Total Talk Time. The total amount of time the agent was talking with a party on an outdial call.
	Total Hold Time. The total amount of time an outdial call made by the agent was on hold.
	Total Time. The total amount of time the agent was connected to an outdial call.
Disconnected Hold Count	The number of times an inbound call was disconnected while the caller was on hold.
Inbound Wrap Up	Count. The number of times the agent went into the Wrap-up state after an inbound call. Rest the cursor over the number in this column to display a pop-up showing the wrap-up codes the agent entered and how many times each code was used.
	Total Time. The total amount of time the agent spent in the Wrap-up state after an inbound call.
Outdial Wrap Up	Count. The number of times the agent went into the Wrap-up state after an outdial call.
	Total Time. The total amount of time the agent spent in the Wrap-up state after an outdial call.
Not Responding	Count. The number of times the agent went into the Not Responding state.
	Total Time. The total amount of time the agent spent in the Not Responding state.
Inbound Consult Answer	Count. The number of times the agent answered a consult request from another agent handling an inbound call.
	Total Time. The amount of time the agent spent being consulted by another agent who was handling an inbound call.
Inbound Consult Request	Count. The number of times the agent consulted another agent while handling an inbound call.
	Total Time. The amount of time the agent spent consulting another agent during an inbound call.
Inbound Consult	Count. The number of times the agent answered consult requests plus the number of times the agent consulted other agents during inbound calls.
	Total Time. The amount of time the agent spent being consulted by other agents plus the amount of time the agent spent consulting other agents during inbound calls.
Conference	The number of times the agent conferenced an inbound call with another party.

Column	Description
Inbound CTQ Answer	Count. The number of times the agent answered a consult-to-queue request from an agent who was handling an inbound call.
	Total Time. The total amount of time the agent spent answering consult-to-queue requests from agents handling inbound calls.
Inbound CTQ Request	Count. The number of times the agent initiated a consult-to-queue while handling an inbound call.
	Total Time. The total amount of time between when the agent initiated consult-to-queue requests while handling inbound calls and when the consultations ended.
Inbound CTQ	Count. Inbound CTQ Answer Count plus Inbound CTQ Request Count.
	Total Time. Total Inbound CTQ Answer Time plus Total Inbound CTQ Request Time.
Outdial Consult Answer	Count. The number of times the agent answered a consult request from another agent who was on an outdial call.
	Total Time. The total amount of time the agent was consulted by another agent who was on an outdial call.
Outdial Consult Request	Count. The number of times the agent consulted another agent while on an outdial call.
	Total Time. The total amount of time the agent consulted another agent during an outdial call.
Outdial Consult	Count. Outdial Consult Answer Count plus Outdial Consult Request Count.
	Total Time. Outdial Consult Answer Total Time plus Outdial Consult Request Total Time.
Outdial CTQ Answer	Count. The number of times the agent answered a consult-to-queue request from an agent who was on an outdial call.
	Total Time. The total amount of time the agent spent answering consult-to-queue requests from agents handling outdial calls
Outdial CTQ Request	Count. The number of times the agent initiated a consult to queue while handling an outdial call.
	Total Time. The total amount of time between when the agent initiated consult-to-queue requests while handling outdial calls and when the consultations ended.
Outdial CTQ	Count. Outdial CTQ Answer Count plus Outdial CTQ Request Count.
	Total Time. Total Outdial CTQ Answer Time plus Total Outdial CTQ Request Time.
Outdial Conference	The number of outdial calls the agent conferenced with another party.
Inbound Transfers	The number of inbound calls the agent transferred to another agent or number.


Column	Description
Outdial Transfers	The number of outdial calls the agent transferred to another agent, queue, or number.
Agent Requeue	The number of inbound calls the agent requeued.
Queue	If the agent is currently handling a call, the queue the call came in on.
DN	The dial number the agent used to log in to the Agent Desktop.
Inbound Average Handle Time	The average length of time spent handling a call (total inbound talk time plus total inbound hold time and total inbound wrap-up time, divided by inbound connected count).

From the Agent view, you can change the report parameters to display agent activity for a different agent or you can display the activity for multiple agents.

The Agent view can display activity for up to 40 agents on a page. If the report covers more than 40 agents, their activities are displayed on multiple pages that you can view by using the controls at the bottom of the report grid.

To change the report parameters:

1. Select one or more agents from the Report Filter panel and, if your enterprise uses the optional multimedia feature, select one or more media channels.

If the Report Filter panel is not already displayed, click the  button on the left side of the menu bar to display it.

2. Click **Apply**.

Skill View

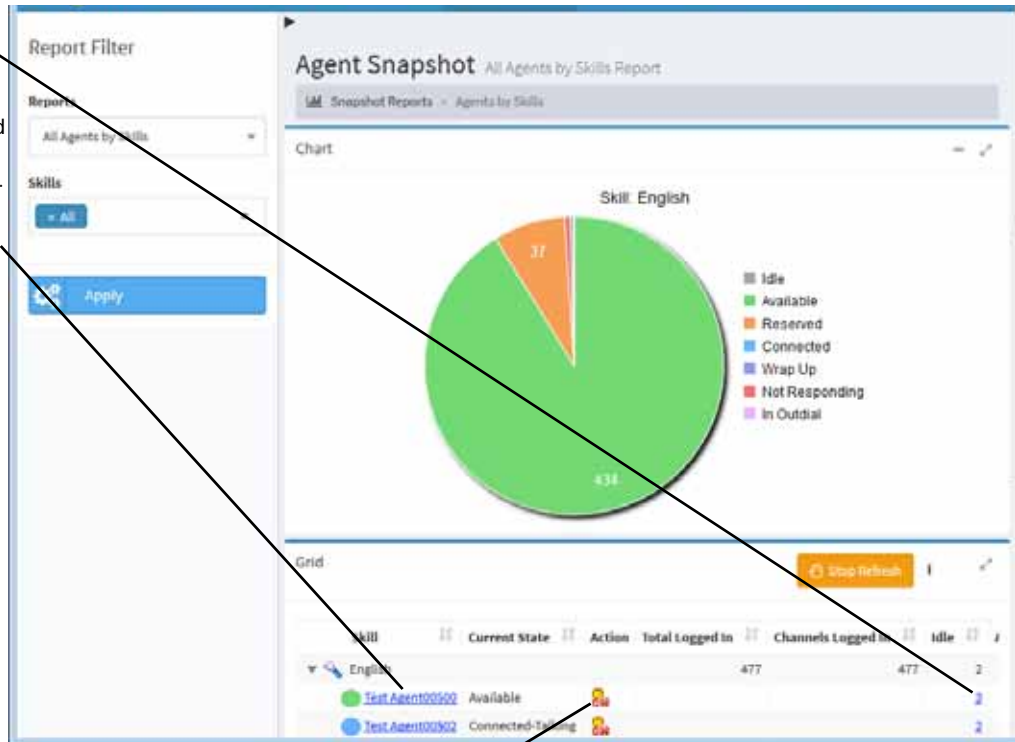
If your enterprise uses the optional skills-based routing feature, you can display the All Agents by Skills report to display real-time agent activity based on the skills they possess.

The report chart displays agent activity for the first skill listed in the report and the grid displays the information described in the following table. If an agent possesses more than one of the skills in the report, that agent's activities are displayed for each skill.

To drill down from the Skill view to the Agent view, click the name of an agent in the **Agent** column of the grid. The Agent view displays call data for that agent. For more information, see [“Agent View” on page 179](#).

Rest the cursor over a number in the Idle column to see the idle codes the agent entered and how many times each code was entered.

Click an agent name to drill down to the Agent view for that agent.



Click this icon to log out the agent.

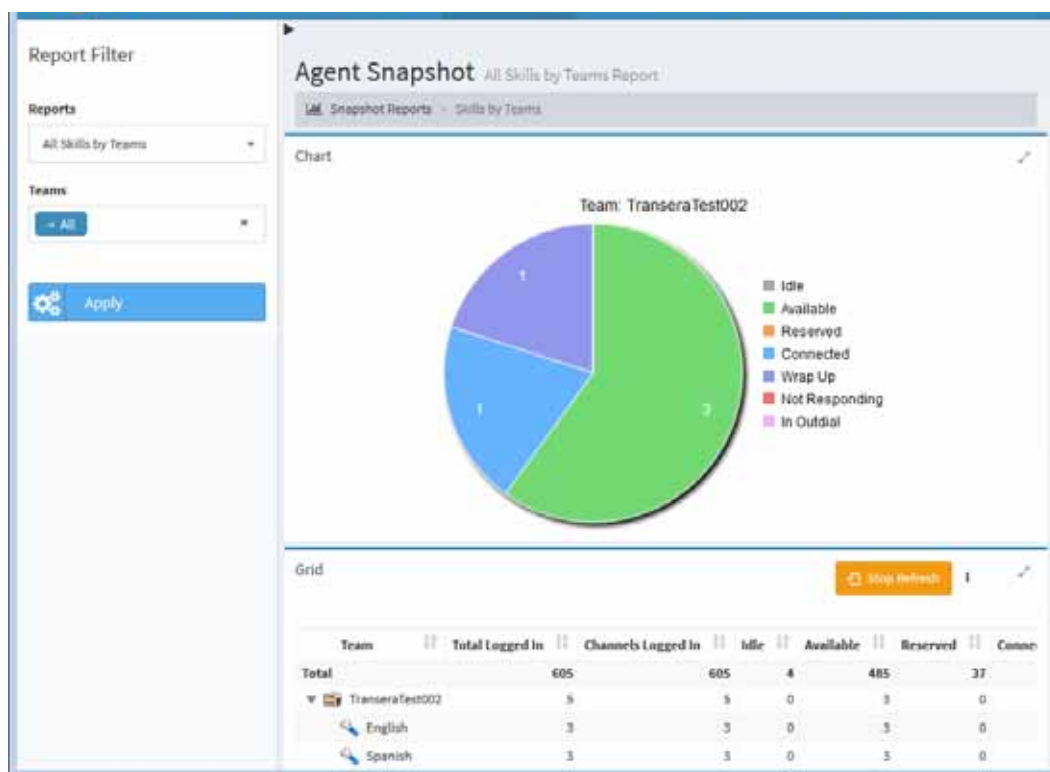
Column	Description
Skill	<p>The name of the skill.</p> <ul style="list-style-type: none"> Click a collapse arrow (▼) or expand arrow (▶) next to a skill name to collapse or expand the list of logged-in agents who possess the skill. Click the name of an agent to drill-down to the Agent view for that agent. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse or expand arrow to the left of an agent name to collapse or expand the data grouped by channel type.
Current State	<p>The agent's current state. See the table on page 174 for a description of each state that can appear in this column.</p> <p>If the current state is Idle, the idle code the agent selected is shown in parentheses (no code is shown if the agent has just logged in and has not selected an idle code).</p>
Action	<p>A Logout (🚪) icon that you can click to log out the agent. For more information, see "Logging Out an Agent" on page 187.</p>
Total Logged In	<p>The total number of agents currently logged in who possess the skill.</p>
Channels Logged In	<p>The number of media channels to which agents who possess the skill are currently logged in.</p>

Column	Description
Idle	<p>In a skill row, the number of agents in the Idle state who possess the skill.</p> <p>In an agent row, the number of times the agent went into the Idle state from a different state. Rest the cursor over a number in this column to display a pop-up showing the idle codes the agent entered and how many times each code was entered.</p> <p>Note: Because an agent can change the idle code while in the Idle state, the number of idle codes displayed in the pop-up can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email.</p>
Available	The number of agents in the Available state who possess the skill.
Reserved	The number of agents in the Reserved state who possess the skill.
Connected	The number of agents in the Connected state who possess the skill.
Login Time	The time the agent logged in.
Time in Current State	How long the agent has been in the current state.
Staff Hours	The amount of time the agent has been logged in.
DN	The dial number the agent used to log in to the Agent Desktop.
Queue	If the agent is currently handling a call, the name of the queue that the call came in on.
Calls Handled	The number of calls the agent handled for that skill since logging in. Rest the cursor over a number in this column to display a pop-up showing the wrap-up codes the agent entered and how many times each code was entered.

Skills by Team View

If your enterprise uses the optional skills-based routing feature, you can display the All Skills by Teams report to view real-time agent activity within each team broken down by skills possessed by agents on the teams. The report chart displays a pie chart of agent activity for the team listed first in the report grid.

The grid displays the following information for each team in the report. Note that the counts shown for all skills possessed by a team can exceed the count of logged-in agents because agents can possess multiple skills. However, the totals row displays the actual number of logged-in agents.



Column	Description
Team	<p>The name a team covered in the report.</p> <ul style="list-style-type: none"> Click a collapse arrow (▼) or expand arrow (►) next to a team name to collapse or expand the list of skills possessed by one or more agents on the team. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse arrow (▼) or expand arrow (►) to the left of a skill name to collapse or expand the data grouped by channel type.
Total Logged In	The number of agents currently logged in.
Channels Logged In	The number of media channels to which agents who possess the skill are currently logged in.

Column	Description
Idle	The number of agents currently in the Idle state.
Available	The number of agents currently in the Available state.
Reserved	The number of agents currently in the Reserved state, during which a call is coming in but has not yet been answered.
Connected	The number of agents currently connected to an inbound call.
Talk	The number of agents in the Connected state who are currently talking with a caller.
Hold	The number of agents in the Connected state who have placed the caller on hold.
Consulting	The number of agents currently consulting with another agent.
Wrap Up	The number of agents currently in the Wrap-up state.
Not Responding	The number of agents currently in the Not Responding state.
In Outdial	The number of agents who are connected to or are wrapping up an outdial call (a call made from the CC-One Agent Desktop by entering a phone number in the Call Out field).

Logging Out an Agent

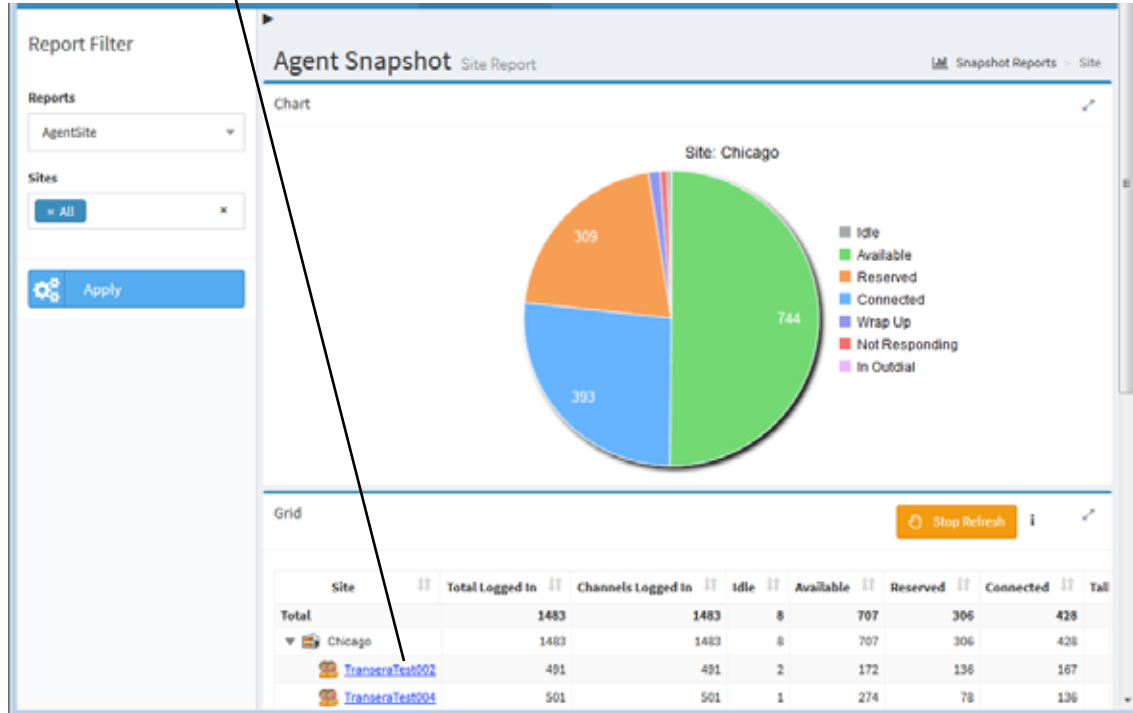
You can log out an agent from the Team view of an agent snapshot report or from the All Agents by Skills report if your enterprise uses the optional skills-based routing feature:

1. Open the **Real-Time Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **View Snapshot Reports** from the drop-down list.

The default agent snapshot report is displayed.

3. If the appropriate report is not already displayed, do one of the following to display it:
 - To navigate to the Skills view, select **All Agents by Skills** from the **Reports** drop-down list, then select the appropriate skill and click **Apply**.
 - To navigate to the Team view, make sure the AgentSite report is displayed and, if the report does not include the site where the agent is located, select the appropriate site from the Sites drop-down list in the Report Filter panel, click **Apply**, and then click the name of the appropriate team to drill down to the Team view.

Click the name of a team to drill-down to the Team view.



4. Click the **Logout** 🚪 icon in the **Action** column for the appropriate agent.


Team	Current State	Action	Total Logged In	Channels Logged In	Idle	Login Time	Time in Current State
Total			491	491			
TranseraTest002			491	491			
Test Agent00508	Available	🚪			2	Saturday, 29 Oct 2016 18:31:43	00:00:33
Test Agent00510	Connected-Talking	🚪			2	Saturday, 29 Oct 2016 19:09:12	00:00:27
Test Agent00511	Reserved	🚪			1	Saturday, 29 Oct 2016 18:49:18	00:00:32
Test Agent00512	Reserved	🚪			1	Saturday, 29 Oct 2016 19:23:28	00:00:36
Test Agent00513	Available	🚪			2	Saturday, 29 Oct 2016 19:53:03	00:00:11
Test Agent00514	NotResponding	🚪			1	Saturday, 29 Oct 2016 19:03:30	00:00:05

5. In the confirmation dialog box, click **OK**.

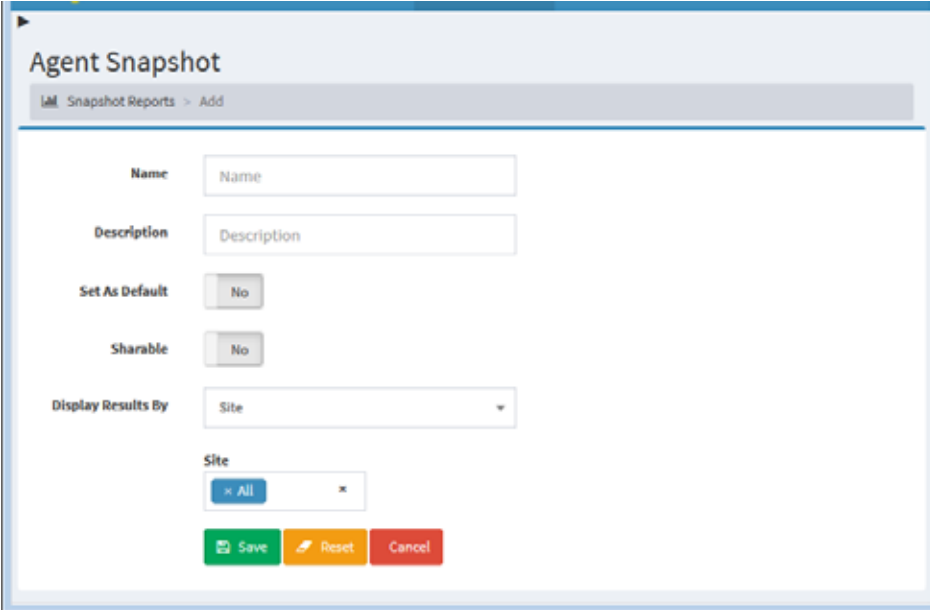
A message informs you when the agent is successfully logged out. Click **OK** to dismiss the message.

Creating a Custom Agent Snapshot Report

To create a custom real-time agent snapshot report:

1. Open the **Real-Time Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Snapshot Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
 - Click the **New Report** button on the upper left side of the page.
 - OR-
 - To copy an existing report, click the  button to the left of a listed report and select **Copy** from the drop-down list.
4. On the Add page that appears, specify the settings for the report as described in the following table, and then click **Save**.

After the new report is saved, it will be available for selection from the Reports drop-down list on the Agent Reports > View Snapshot Reports page and will be listed in the Customize Snapshot Reports page with your login name displayed in the *Created By* column.




Setting	Description
Name	Enter a name for the report.
Description	Optionally, enter a short description of the report.

Setting	Description
Set as Default	Select Yes if you want this report to be displayed the next time you select the Agent Reports > View Snapshot Reports link. A multi-team cannot be set as the default. Note: You must log out and log in again for the new default to take effect.
Sharable	Select Yes if you want everyone who has access to the CC-One Real-Time Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by site, team, multi-team, agent, or (if your enterprise uses the optional skills-based routing feature) by skill or skills by team. Then select the sites, teams, agents, or skills you want included in the report. If you selected to display results by Multi-Team , you can select multiple teams across sites. A Multi-Team View displays agents in the selected teams by Team. This view displays a maximum of 40 agents per page. Agents for a team can be split across pages. The refresh interval is 30 seconds.

Specifying a Different Default Agent Snapshot Report

When select **Agent Reports > View Snapshot Reports** in the Real-Time Reports module, the default agent snapshot report is displayed.

To specify a different default report:

1. Open the **Real-Time Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Snapshot Reports** from the drop-down list.
3. On the List page that appears, click the  button to the left of a listed report that is not canned not a multi-team report and select **Set As Default**.

Note: You must log out and log in again for the new default to take effect.

Displaying a Real-Time Agent Interval Report

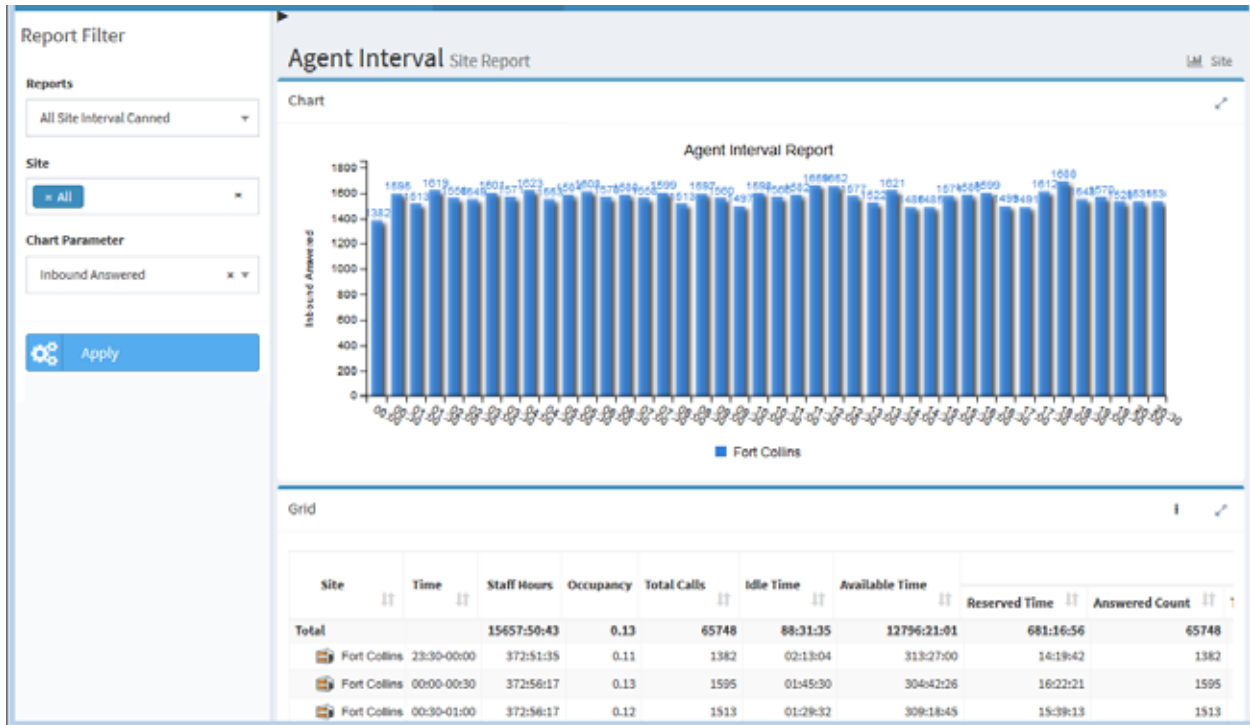
Agent interval reports display cumulative and derived values in half-hour segments since midnight at the site, team, or agent level. If your enterprise uses the optional skills-based routing feature, you can also display data at the team level broken down by skills possessed by the agents on each team in the report.

To display a real-time agent interval report:

1. Open the **Real-Time Reports** module.
2. Click the **Call Reports** button on the menu bar and select **View Interval Reports** from the drop-down list.

A default interval report is displayed.

3. To change the sort order in the grid, click a column header to sort the data by that column, and click it a second time to reverse the sort order. To sort by additional columns, hold down the CTRL key while you click a second and subsequent headings.
4. To display a different report:
 - a. Make a selection from the **Reports** drop-down list.
 - b. To display different statistics, select values from the **Sites**, **Teams**, or **Agents** list and, for a skills report, from the **Skills** list.
 - c. Select a parameter from the **Chart Parameter** list. This parameter will be displayed in the report chart.
 - d. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.
 - e. Click **Apply**.



The report chart displays the selected chart parameter (such as number of calls) for each site, team, or skill by team in half-hour segments.

The grid in an agent-level, team-level, or site-level agent interval report displays the following summary information for one or more agents, sites, or teams in half-hour segments.

Column	Description
Site	The name of a site in the report (does not appear in agent-level reports). If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse arrow (▼) or expand arrow (►) to the left of a site name to collapse or expand the data grouped by channel type.
Team	The name of a team in the report (appears only in team-level and skills reports).
Agent	The name of an agent in the report (appears only in agent-level reports). If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse arrow (▼) or expand arrow (►) to the left of an agent name to collapse or expand the data grouped by channel type.
Time	The time interval.

Column	Description
Staff Hours	The amount of time the agent was logged in during the time interval.
Occupancy	The measure of time the agent spent on calls compared to available and idle time, calculated by dividing total connected time (inbound connected time plus outdial connected time) plus total wrap up time (inbound wrap up time plus outdial wrap up time) by staff hours.
Total Calls	Inbound Answered calls plus Outdial Attempted calls.
Idle Time	The amount of time agents were in the Idle state during the time interval.
Available Time	The amount of time agents were in the Available state during the time interval.
Inbound	Reserved Time. The amount of time agents were in the Reserved state, during which incoming calls were ringing but had not yet been answered.
	Answered Count. The number of inbound calls that were answered by an agent during the time interval.
	Talk Time. The amount of time agents were talking on inbound calls during the time interval.
	Hold Time. The amount of time inbound calls were on hold during the time interval.
	Connected Time. The amount of time inbound calls were connected to an agent during the time interval (inbound talk time plus inbound hold time).
	Wrap Up Time. The amount of time agents spent in the Wrap-up state after an inbound call during the time interval.
	Average Connected Time. Inbound connected time divided by the number of inbound calls that were connected during the time interval.
	Average Handle Time. The average length of time spent handling an inbound call (inbound connected time plus inbound wrap-up time, divided by number of inbound calls).
Not Responding Time	The amount of time agents spent in the Not Responding state during the time interval.

Column	Description
Outdial	Attempted. The number of calls that agents initiated during the time interval.
	Connected. The number of outdial calls that were connected to an agent during the time interval.
	Reserved Time. The amount of time agents were in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet.
	Talk Time. The amount of time agents were talking on outdial calls during the time interval.
	Hold Time. The amount of time outdial calls were on hold during the time interval.
	Connected Time. The amount of time outdial calls were connected to an agent during the time interval (outdial talk time plus outdial hold time).
	Wrap Up Time. The amount of time agents spent in the Wrap-up state after an outdial call during the time interval.
	Average Connected Time. Outdial connected time divided by the number of outdial calls that were connected during the time interval.
	Average Handle Time. The average length of time spent handling an outdial call (outdial connected time plus outdial wrap-up time, divided by number of outdial calls).

The grid in a Skills Interval by Team report displays the following summary information for one or more teams and skills in half-hour segments.

Column	Description
Site	The name of a site in the report.
Team	The name of a team in the report.
Skill	The name of a skill assigned to a team or agent on a team covered in the report.
Time	The time interval.
Staff Hours	The amount of time the agent was logged in during the time interval.
Occupancy	The measure of time the agent spent on calls compared to available and idle time, calculated by dividing connected time plus wrap up time by staff hours.
Number of Calls	The number of inbound calls that were connected to the site or team during the time interval.
Talk Time	The amount of time agents were talking with callers during the time interval.
Hold Time	The amount of time callers were on hold during the time interval.

Column	Description
Connected Time	The amount of time inbound calls were connected to an agent during the time interval (talk time plus hold time).
Wrap Up Time	The amount of time agents spent in the Wrap-up state after an inbound call during the time interval.
Average Connected Time	The connected time divided by the number of calls that were connected during the time interval.
Average Handle Time	The average length of time spent handling a call (connected time plus wrap-up time, divided by number of calls).

Viewing Multiple Real-Time Chart Reports

The Real-Time Reports module includes a Chart Reports page that can display up to four charts from your existing real-time call and agent reports.

When you access the Chart Reports page for the first time, the page displays controls for creating a custom multi-chart report so you can create a default report.

Topics covered in this section:

- [Displaying Multi-Chart Reports](#)
- [Creating a Custom Multi-Chart Report](#)
- [Specifying a Different Default Multi-Chart Report](#)

See Also:

- [Modifying a Real-Time Report](#)
- [Deleting a Real-Time Report](#)

Displaying Multi-Chart Reports

To display a multi-chart report:

1. Open the **Real-Time Reports** module.
2. Click the **Chart Reports** button on the menu bar and select **View Reports** from the drop-down list.

The default multi-chart report is displayed.

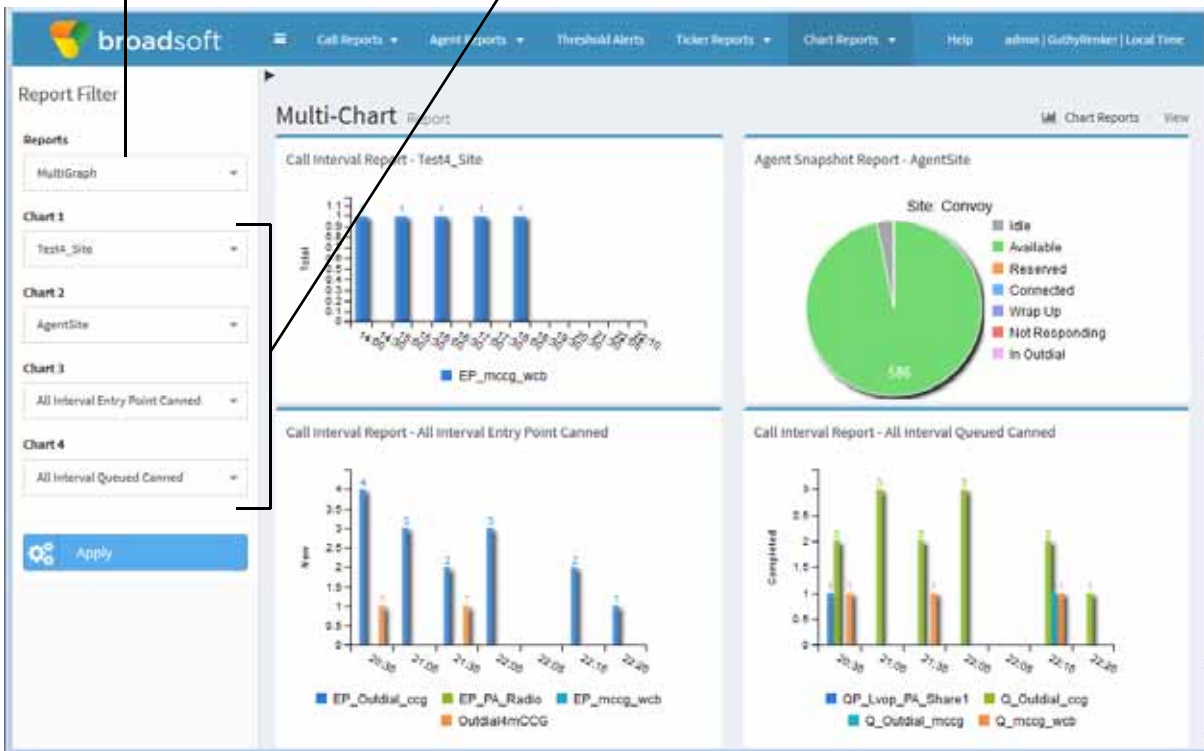
-OR-

If no default report exists, the page displays settings for creating one as described in [“Creating a Custom Multi-Chart Report” on page 196](#) beginning with step 4.

3. To view different charts, do one of the following:
 - Select a report from the **Reports** drop-down list.
 - OR -
 - Select a report from one or more of the **Chart** lists and click **Apply**.


Select a report from the drop-down list.

To view different charts, select reports from these lists and then click **Update Report**.



Creating a Custom Multi-Chart Report

To create a custom multi-chart report:

1. Open the **Real-Time Reports** module.
2. Click the **Chart Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
 - Click the **New Report** button on the upper-left side of the page.
 - OR-
 - To copy an existing report, click the  button to the left of a listed report and select **Copy** from the drop-down list.
4. Enter a name and, optionally, a description for the report in the **Name** and **Description** fields.

- In the **Set as Default** field, select **Yes** if you want this report to be displayed the next time you access the Multi-Chart Reports page.

Note: You must log out and log in again for the new default to take effect.

- In the **Sharable** field, select **Yes** if you want everyone who has access to the CC-One Real-Time Reports module to be able to see the report.
- Select the reports you want to include from the **Chart** drop-down lists.
- Click **Save**.

The screenshot shows a web form titled "Multi-Chart Report". It contains the following elements:


- Name:** A text input field with the placeholder "Name".
- Description:** A text input field with the placeholder "Description".
- Set As Default:** A button labeled "No".
- Sharable:** A button labeled "No".
- Chart 1, Chart 2, Chart 3, Chart 4:** Four dropdown menus, each currently showing "None".
- Buttons:** Three buttons at the bottom: "Save" (green), "Reset" (orange), and "Cancel" (red).

The report appears in the Saved Reports list and is available for selection from the Reports drop-down list on the Multi-Chart Report view page.

Specifying a Different Default Multi-Chart Report

When select **Chart Reports > View Reports** in the Real-Time Reports module, the default multi-chart report is displayed.

To specify a different default report:


- Open the **Real-Time Reports** module.
- Click the **Chart Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
- On the List page that appears, click the  button to the left of a listed report that is not canned and select **Set as Default**.

Note: You must log out and log in again for the new default to take effect.

Modifying a Real-Time Report

Note: Canned reports cannot be modified.


To modify a real-time report:

1. Open the **Real-Time Reports** module and click the relevant button on the menu bar: **Call Reports**, **Agent Reports**, or **Chart Reports**.
2. Select **Customize Snapshot Reports**, **Customize Interval Reports**, or **Customize Reports** from the drop-down list.
3. On the page that appears, click the  button to the left of a listed report and select **Edit**.
4. Make the changes you want, and then click **Save**. For information about the available settings, see one of the following topics:
 - “Creating a Custom Call Interval Report” on page 165
 - “Creating a Custom Call Snapshot Report” on page 167
 - “Creating a Custom Agent Snapshot Report” on page 189
 - “Creating a Custom Multi-Chart Report” on page 196

Deleting a Real-Time Report

Note: Canned reports cannot be deleted.

To delete a real-time report:

1. Open the **Real-Time Reports** module and click the relevant button on the menu bar: **Call Reports**, **Agent Reports**, or **Chart Reports**.
2. Select **Customize Snapshot Reports**, **Customize Interval Reports**, or **Customize Reports** from the drop-down list.
3. On the page that appears, click the  button to the left of a listed report and select **Delete**.



Printing a Report

To print a report, use the Print button on your Web browser.

Exporting Report Data

You can export real-time or historical report data to a data analysis tool such as Microsoft Excel by downloading it in the appropriate format and saving it.

To download report data for export to a data analysis tool:

1. Display the report. For instructions, see one of the following topics:
 - “Displaying a Call Snapshot Report” on page 159
 - “Displaying a Call Interval Report” on page 163
 - “Displaying Agent Snapshot Reports” on page 171
 - “Displaying a Real-Time Agent Interval Report” on page 191
 - “Displaying Historical Call Report Data” on page 226
 - “Historical Agent Reports” on page 239
 - “Displaying Auxiliary Reports” on page 259
 - “Displaying Historical Skill Reports” on page 263
2. To export the file to comma-separated values (CSV) format:
 - a. Click the  button on the right side of the **Grid** panel header and select **CSV**.
 - b. In the dialog box that opens, click **Open** to view the file or **Save** to save the file.
3. To export the file to Microsoft Excel format:
 - a. Click the  button on the right side of the **Grid** panel header and select **Excel**.
 - b. In the dialog box that opens, click **Open**. The Microsoft Excel application opens, but the format of the data is CSV.
 - c. To save the exported data as a Microsoft Excel (.xls) file, select **Save As** from the Microsoft Excel **File** menu. Then, in the **Save as type** field, select the appropriate Microsoft Excel Workbook format.

Note: If the exported report includes date and time data in hh:mm:ss format, Excel displays the data in hh:mm format. However, you can double-click in the cell to see the data in hh:mm:ss format. [<DELETE THIS NOTE?>](#)

Monitoring Threshold Alerts

If your enterprise uses the threshold alerts feature, authorized users can create threshold rules to monitor agent and call data as described in “[Threshold Rules](#)” beginning on [page 326](#).

When a threshold is breached, an alert is sent to the Real-Time Reports module where it can be viewed, acknowledged, and archived by authorized users. In addition, a threshold rule can specify one or more email addresses to which alert notifications are sent when a threshold is breached. If a threshold is defined as agent-viewable and is selected in the agent profile assigned to an agent, the agent can display alerts in a separate window by clicking a button on the Agent Desktop (see “[Agent Profiles](#)” beginning on [page 342](#)).

To monitor threshold:

1. Open the **Real-Time Reports** module and click the **Threshold Alerts** button on the menu bar.

The page displays three panels. When a threshold is breached, an alert is displayed in the **Alerts Summary** panel.

- If the threshold is breached multiple times during the time interval specified for the threshold, no additional alerts are displayed. For example, if the time interval specified for the threshold is 300, then only one alert will be sent during each 5-minute interval. If the threshold continues to be breached after the time interval, a new alert is displayed.
- Every five minutes, the system automatically acknowledges alerts for thresholds that are no longer being breached.
- A sound is played repeatedly from the time an alert arrives until it is acknowledged. Click the **Mute** button on the lower left side of the page to mute the sound. When you do so, the button changes to a **Sound** button.

Click an entry in this panel to display details about the selected metric in the panel on the right.

Click to select all unacknowledged alerts.

Click to acknowledge the selected alerts and move them to the bottom panel.

Click a check box to select an alert.

Will try to replace this image with a better one when I have access to a build displaying real-time threshold alert data.

Alert Summary

Entity	Metric Name	Active Count	Acknowledged Count
Site	Idle Agents	0	3
Site	Number Of Logged In Agents	0	2
Site	Available Agents	0	1
Team	Idle Agents	0	3
Team	Number Of Logged In Agents	0	3
Team	Available Agents	0	1

Alert Details - Idle Agents

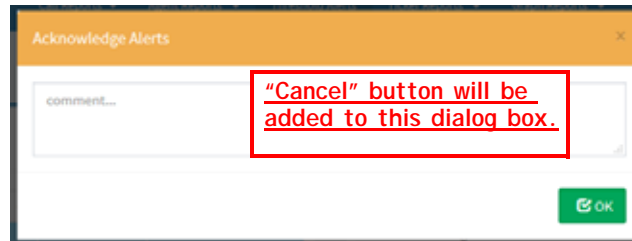
Threshold Value	Actual Value	Alert Time	Acknowledge
1.0	1.0	18:35:09	<input checked="" type="checkbox"/> Auto acknowledged
1.0	1.0	18:25:34	<input checked="" type="checkbox"/> Auto acknowledged
1.0	1.0	18:25:29	<input checked="" type="checkbox"/> Auto acknowledged

Archived Alert

Id	Message	Alert Time	Acknowledged Time	Acknowledged By	Action Taken
16	Current Available Time - Threshold : 20 (sec) , Actual: 261 (sec)	18:35:04	18:35:24	BroadSoft	Auto acknowledged
13	Current Available Time - Threshold : 20 (sec) , Actual: 20 (sec)	18:31:04	18:35:24	BroadSoft	Auto acknowledged
10	Total Idle Time - Threshold : 300 (sec) , Actual: 302 (sec)	18:30:24	18:35:24	BroadSoft	Auto acknowledged
9	Current Idle Time - Threshold : 20 (sec) , Actual: 267 (sec)	18:29:49	18:35:24	BroadSoft	Auto acknowledged
8	Current Idle Time - Threshold : 20 (sec) , Actual: 23 (sec)	18:25:49	18:32:33	BroadSoft	Auto acknowledged

2. To acknowledge an alert and optionally provide a comment on action being taken:
 - a. Click an entry in the **Alerts Summary** panel to display the alert in the **Alert Details** panel.
 - b. Either select one or more check boxes in the **Acknowledge** column or select the **Select All** check box at the top of the **Alert Details** panel.
 - c. Click the **Acknowledge** button on the upper right side of the **Alert Details** panel.

A dialog box appears where you can enter an optional comment, and then either click **OK** or click **Cancel** to cancel the action.



A message informs you that the acknowledgement was successful. Click **OK** to dismiss the message. <Message does not appear--to be in next build>

3. To archive acknowledged alerts, click the **Archive All** button at the bottom of the page.

The alerts are moved to the Archived Alerts panel.

The system automatically archives acknowledged alerts every fifteen minutes. For CC-One Business Edition users, all the alerts for the day are moved from this page to the Threshold Alerts page in the Historical Reports module at midnight (see “[Historical Threshold Alerts](#)” on page 270).

4. The data in all three panels is refreshed every 30 seconds as well as whenever you archive an alert.
 - Click the **Refresh** button at the bottom of the page to refresh the data more frequently.
 - Click the **Stop Refresh** button to prevent the data from being refreshed every 30 seconds. When you do so, the button changes to a **Start Refresh** button.

Working with the Ticker

The ticker is a horizontal scrolling text area at the top of the CC-One Real-Time Reports pages. The ticker displays the current number of calls in the IVR system for one or more specified entry points, or the number of calls in queue, the number of connected calls, the current service level, and the longest call in queue time for one or more specified queues, sites, and teams.

A set of canned tickers is provided so that you can immediately start viewing ticker information when you first open the module. See “[Canned Reports and Tickers](#)” on page 148 for more information. You can start or stop the scrolling and customize the ticker to display the key performance indicators that are most important to your operation.

Topics covered in this section:

- [Starting and Stopping the Ticker](#)
- [Creating a New Ticker or Modifying an Existing One](#)
- [Deleting a Saved Ticker](#)
- [Specifying Which Ticker to Display](#)

Starting and Stopping the Ticker

To start the ticker, click the arrow ► button located beneath the menu bar on the upper-left side of a real-time report.




The arrow changes to a **Stop** ■ button that you can click to stop the ticker.



Creating a New Ticker or Modifying an Existing One

To create a new ticker or modify an existing one:


1. Open the **Real-Time Reports** module.
2. Click the **Ticker Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
 - Click the **New Report** button on the upper left side of the page.
 - OR-
 - To copy or modify an existing report, click the  button to the left of a listed report and select **Copy** or **Edit** from the drop-down list.
4. On the page that appears, specify the settings for the report as described in the following table, and then click **Save**.

Setting	Description
Name	Enter a name for the ticker.
Description	Optionally, enter a short description of the ticker.
Set as Default	Select Yes if you want this to be the default ticker. A multi-team cannot be set as the default. The default ticker is displayed every time you open the Real-Time Reports module unless you override it for your current session. Note: You must log out and log in again for the new default to take effect.
Sharable	Select Yes if you want everyone who has access to the CC-One Real-Time Reports module to be able to see the report.
Display Results By	If you are creating a new ticker, select a value from the drop-down list to specify whether you want the results to be displayed by Entry Point or Queue. Then, if you are creating or modifying an entry point ticker, select one or more entry points for which you want data to be displayed by the ticker. If you are creating or modifying a queue ticker, select one or more queues, sites, and teams for which you want data to be displayed by the ticker.

Deleting a Saved Ticker

To delete a saved ticker:


1. Open the **Real-Time Reports** module.
2. Click the **Ticker Reports** button on the menu bar and select **Customize Reports** from the drop-down list.

3. On the List page that appears, click the  button to the left of the ticker you want to delete and select **Delete** from the drop-down list.

Specifying Which Ticker to Display

If one or more tickers have been previously created and saved, you can specify which ticker will be displayed on your CC-One Real-Time pages by changing the default or by setting a different ticker view for the current session.

To specify a different ticker for display:

1. Open the **Real-Time Reports** module.
2. Click the **Ticker Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the  button to the left of a listed report and then select a value from the drop-down list:
 - Select **Set View** if you want the selected ticker to be used during the current session only.
 - Select **Set as Default** if you want the selected ticker to be the default ticker.

... 5 Call Monitoring

The Call Monitoring module enables authorized users to silently monitor any active call that is managed by the CC-One service at any time, across any site, and verify that customers are being served in a professional manner. Authorized users can also create monitoring schedules, coach an agent who is connected to a call by providing comments that only the agent can hear, and barge in on calls as needed.

This chapter explains how to participate in silent monitoring and coaching sessions for selected voice calls.

Topics covered in this chapter:

- [Monitoring Overview](#)
- [Monitoring Calls](#)
- [Coaching an Agent](#)
- [Barging in on a Call](#)
- [Viewing Call Monitoring Information](#)
- [Working with Monitoring Schedules](#)

Monitoring Overview

The CC-One Call Monitoring module enables call center managers to monitor the quality of service being delivered across their multi-source call centers. Through a simplified Web interface, authorized users can select a combination of one or more queues, sites, and teams, as well as a specific agent they want to monitor. After these criteria have been entered, the system places a request to monitor the next call that matches the combination of all the criteria when the call is distributed to the destination site. Monitoring can be done on a continuous, one time only (ad hoc), or scheduled basis, and authorized users can monitor a call that is already in progress.

The audio for the call is delivered through an inbound phone call using a phone number associated with the user engaged in monitoring. Authorized supervisors can coach an agent during a connected call by providing comments that only the agent can hear and can barge in on a call and become part of the conversation between the agent and the customer.

Note the following:

- You cannot make a continuous monitoring request and an ad-hoc request for the same target at the same time.
- If a *scheduled request* and a *continuous request* are made for the same target, the continuous request takes precedence. When the continuous request is paused or cancelled, the scheduled request is enabled.
- If a *scheduled request* and an *ad-hoc request* are made for the same target, the ad-hoc request takes precedence. When the ad-hoc request is either cancelled or completed, the scheduled request is enabled.
- If you sign out of the CC-One Management Portal while a monitoring request is still active, a message asks if you want to cancel the monitor request or continue monitoring.

If you select **Yes**, any active mid-call, ad-hoc, or continuous monitoring requests will be cancelled after you log out and any scheduled requests will be suspended.

Monitoring Calls

The Call Monitoring page provides an interface for monitoring a call on a continuous or one-time only basis, and down to the agent level.

To monitor a call:

1. Open the **Call Monitoring** module.
2. In the Monitoring Filter panel on the left side of the page, specify one or more queues, sites, teams, and agents you want to monitor. If you leave a Queue, Site, Team, or Agent list set to **All**, only those entities to which you have access will be included in the request.
3. In the **Callback Number** field, enter the phone number where you want the audio to be sent. Enter all the digits required to reach that phone, without hyphens or other special characters. For example, if the phone number is 415-555-1234, you would enter 4155551234.
4. Select the format for the callback number:
 - **U.S. Format** (the default) interprets the phone number as 1 + area code + seven-digit phone number.
 - **Other** indicates that the phone number format is other than U.S. format.
5. If you want to prevent this monitoring session from being displayed on other users' Management Portals, select the **Use Invisible Mode** check box.
6. Click one of the buttons described in the following table to submit your monitor request.

Select this button	To do this
Monitor Next Call	Monitor the next incoming call that fits the specified criteria.
Mid-Call Monitor	Monitor a call that is already in progress and connected to an agent. This button is available only if mid-call monitoring is authorized by your user role. If no call is in progress, the request fails.



Select this button	To do this
Continuous Monitor	Continuously monitor calls that fit the specified criteria. After you click this button, a dialog box appears where you can enter the duration of the monitoring session in minutes or leave the default set to Unlimited . Then, click Monitor to dismiss the dialog box and submit your request.

Note: After the monitor duration has expired, the system may take up to 5 minutes to remove the monitor request, during which time one additional call might be delivered to you.






Your request appears in the Monitor Requests list along with any pending requests from your colleagues.



Pending requests from you and your colleagues are listed here.




When a call that matches the criteria you specified is distributed to the destination site, the audio is delivered through a phone call to the number you specified. The monitored call appears in the Calls Being Monitored list.

Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Duration	Action
loadQ_mCCG	Convergys	TranseraTest010	Test Agent04800	monitoring-started	admin	555	00:01:31	 

For more information about the elements displayed on the Call Monitoring page, see [“Viewing Call Monitoring Information” on page 213](#).

- If authorized by your user role, you can click the **Coach**  or **Barge In**  button in the Action column to coach the agent or barge in on the monitored call. For details, see [“Coaching an Agent” on page 212](#) and [“Barging in on a Call” on page 213](#).
- When the call has ended, click **Monitor Next Call** to monitor the next call in the queue, or, if you selected **Continuous**, the next call in the queue is automatically sent to you.
- Click the **Cancel**  button to cancel monitoring activity for that request. If you selected Continuous, you can click the **Pause**  button to temporarily halt the calls sent to your number. Then you can click the **Resume**  button to resume monitoring.

Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Duration	Action
loadQ_mCCG	Convergys	TranseraTest010	Test Agent04800	monitoring-started	admin	555	00:01:31	 

Request Type	Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Action
Scheduled	[Any Queue]	[Any Site]	[Any Team]	[Any Agent]	Request Pending	admin	955	
Continuous	[Any Queue]	[Any Site]	[Any Team]	[Any Agent]	Request Pending	admin	555	 

Note: If an agent goes into the Not Responding state, the call goes back to queue and the caller hears music on hold. If during this time, a supervisor is monitoring the call, the supervisor is disconnected as well. If the supervisor is scheduled to monitor the call but has not yet picked up, the call disappears from the Monitor Requests list and the phone stops ringing.


Coaching an Agent


If the Whisper Coach feature is enabled in your user role, you can speak to an agent who is being monitored without being heard by the customer.


- The coaching session continues, even if the call is transferred to another agent, until the call either ends or is transferred to another number (agent-to-DN transfer).
- If the coached agent consults with another agent, you will hear music on hold and will not be able to continue coaching the agent until the caller is taken off hold.

While coaching an agent, you can barge in on the call if the Barge In feature is enabled in your user role.

To silently coach an agent:

1. While you are monitoring a call (as described in [“Monitoring Calls” on page 209](#)) and the call is connected to an agent, click the **Coach**  button.

Do not click the **Coach**  button if the call is waiting in a queue after having been transferred by the agent to another queue. Doing so will cause your coach request to fail.


The **Coach**  button is not available when the agent transfers the call to another number (DN transfer).


2. Provide verbal instructions to the agent.
3. To remove yourself from the call, hang up. The call is removed from the Calls Being Monitored list.

Barging in on a Call

Authorized users can use the Barge-In function to join a call they are monitoring and participate in the conversation between the agent and the customer unless the call is transferred to another number (agent-to-DN transfer), after which the call is removed from the Calls Being Monitored list.

To barge in on a call:

1. While you are monitoring or coaching a call (as described in [“Monitoring Calls” on page 209](#)), and the call is connected to an agent (and not waiting in a queue), click the **Barge In**  button.

You are immediately connected to the call. The **Barge In**  button disappears from the page.

2. To remove yourself from the call, hang up. The call is removed from the Calls Being Monitored list.

Viewing Call Monitoring Information

To view call monitoring information, click the **Call Monitoring** link on the CC-One Management Portal.



The Call Monitoring page displays the following:

- Controls for requesting a monitoring session. For more information, see [“Monitoring Calls” on page 209](#).
- A chart of active and queued calls for the queue that is currently selected in the Monitoring Filter panel on the left side of the page.
- The Monitoring Requests/Calls Being Monitored table, which displays the two lists described in the following sections:
 - [Calls Being Monitored List](#)
 - [Monitoring Requests List](#)

Note: If you resize the Call Monitoring window to a very narrow size, the Monitoring Requests/Calls Being Monitored table will be displayed at the bottom of the window. It might appear that the table is missing, but you can see it by scrolling to the bottom of the window.

Calls Being Monitored List

The Calls Being Monitored list displays information about all calls currently being monitored in your enterprise. Following is a description of each column in the list.

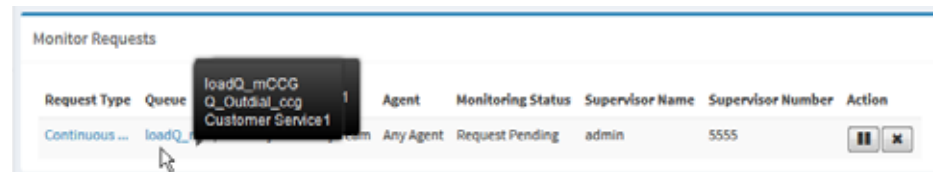
Note: When a monitored call is transferred to specific phone number (agent-to-DN transfer), it is removed from the Calls Being Monitored list and thus, the **Coach**  and **Barge In**  buttons are no longer available.

Column	Description
Queue	The queue that received the call.
Site	The call center location to which the call was distributed.
Team	The team to which the call was distributed.
Agent	The name of the agent being monitored or a numeric ID code if the call was answered by a capacity-based team resource instead of by a CC-One agent.
Monitoring Status	The status of the monitoring session: <ul style="list-style-type: none"> • monitoring-started. The monitoring supervisor has picked up the phone. • connected. The agent has picked up the call. • CoachStarted. The monitoring supervisor has started coaching the agent. • barged. The monitoring supervisor has barged in on the call.
Supervisor Name	The name of the person monitoring the call.
Supervisor Number	The phone number of the person monitoring the call.
Duration (mm:ss)	The number of minutes and seconds since the call arrived.
Action	Buttons that you can click to coach or barge in on a call that is being monitored, if authorized by your user role.

Monitoring Requests List

The Monitor Requests list displays information about all monitoring requests in your enterprise.

If a monitoring request includes multiple queues, sites, teams, or agents, you can display a list of them in a tool tip by placing your mouse on a value in the Queue, Site, Team, or Agent column.



Following is a description of each column in the Monitoring Requests list.

Column	Description
Request Type	<p>Three request types can appear in the list:</p> <ul style="list-style-type: none"> • Continuous. The specified target (queue, team, site, or agent) will be continuously monitored until the request is paused or cancelled or until the monitoring duration is reached if the monitoring user specified a duration. You can point to the word <i>Continuous</i> to display a tooltip showing the duration of the monitoring request or <i>Unlimited</i> if no duration was specified. • Scheduled. A call monitoring schedule for the specified target has been set up and is running. • Ad-Hoc. The next call that matches the specified criteria will be monitored.
Queue	The queues included in the request. If multiple queues are included, you can display a list of them by pointing to the value displayed in the column.
Site	The sites included in the request. If multiple sites are included, you can display a list of them by pointing to the value displayed in the column.
Team	The teams included in the request. If multiple teams are included, you can display a list of them by pointing to the value displayed in the column.
Agent	The agents included in the request. If multiple agents are included, you can display a list of them by pointing to the value displayed in the column.
Monitoring Status	<p>The status of the monitoring session:</p> <ul style="list-style-type: none"> • Request Pending. The request has been submitted. • Monitoring. The supervisor has picked up the phone.
Supervisor Name	The name of the person who submitted the request.
Supervisor Number	The phone number of the person who submitted the request.

Column	Description
Action	Buttons you can click to pause, resume, or cancel a monitoring request.

Working with Monitoring Schedules

The Monitoring Schedules page in the Call Monitoring module enables authorized users to schedule call monitoring requests at specific times of the day or week. Note the following:


- Unless otherwise authorized by your user role, you can view and edit only those call monitoring schedules that you created.
- The start and end times specified in the Call Monitoring Schedule use the enterprise time. However, calls are actually monitored in local time. Be sure to adjust for this when specifying start and end times in your monitoring schedules.

Topics covered in this section:

- [Creating or Editing a Monitoring Schedule](#)
- [Activating and Deactivating Monitoring Schedules](#)
- [Exporting the Monitoring Schedule List](#)
- [Deleting a Monitoring Schedule](#)

Creating or Editing a Monitoring Schedule

To create a new monitoring schedule or edit an existing one:


1. Open the **Call Monitoring** module and click the **Schedule** button on the menu bar.
2. To create a new schedule:
 - From the list view, click **New Schedule**.
 - OR -
 - From the calendar view, point to the schedule's beginning date and click the **Create** link that appears in the upper-left corner of the date box.
3. To copy or edit an existing schedule from the list view, click the  button to the left of a listed schedule and select **Copy** or **Edit** from the drop-down list.
4. On the page that appears, specify the appropriate settings as described in the following table, and then click **Save**.

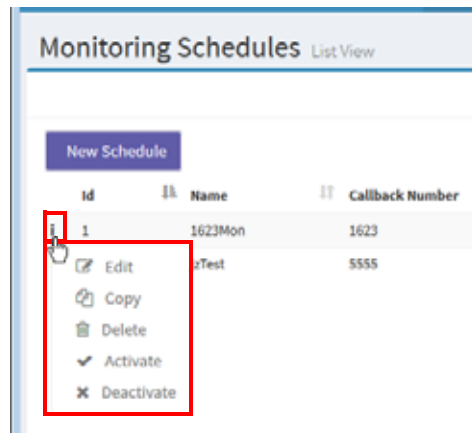
Setting	Description
Name	Enter a name for the schedule.
Start Date End Date	To select the start date (the date the schedule becomes effective) and end date (the date the schedule expires), click the appropriate calendar icon in the <i>Start Date</i> or <i>End Date</i> field, and then select a date from the calendar that appears.
Start Time End Time	<p>Enter in 24-hour format (0000 to 2400) the time of day you want the schedule to start and end.</p> <p>Be sure to adjust for the fact that the time you specify in the Call Monitoring Schedule uses the enterprise time. However, calls are actually monitored in local time.</p> <p>Note: Pending monitor requests are checked every 'n' number of seconds as configured for your system. The default value is five minutes. When this checking function starts, each monitor request is checked and validated. If the request is past the scheduled deadline (that is, the End Time value), it is removed from the pending monitor requests list. Because of this added functionality, the scheduled end time may actually occur a few minutes later than specified.</p>

Setting	Description
Day of Week	From the drop-down list, select All Days if you want the schedule to run every day or Weekdays if you want the schedule to run Monday through Friday only. -OR- Select each icon that represents a day during which you want the schedule to run.
Status	Select Active if you want the schedule to become effective at the specified start time on the specified start date. Otherwise, select Not Active .
Callback Number	Enter the phone number of where you want the audio sent. Select U.S. Format (the default) if this number has the format: 1 + area code + number. Select Other if not a U.S. format.
Filter by	Select the queues, sites, teams, and agents you want monitored as part of this schedule.

Activating and Deactivating Monitoring Schedules


You can activate or deactivate a monitoring schedule by editing the *Status* field in the settings for the schedule, or you can simply click a button in the list view Monitoring Schedules page as follows:

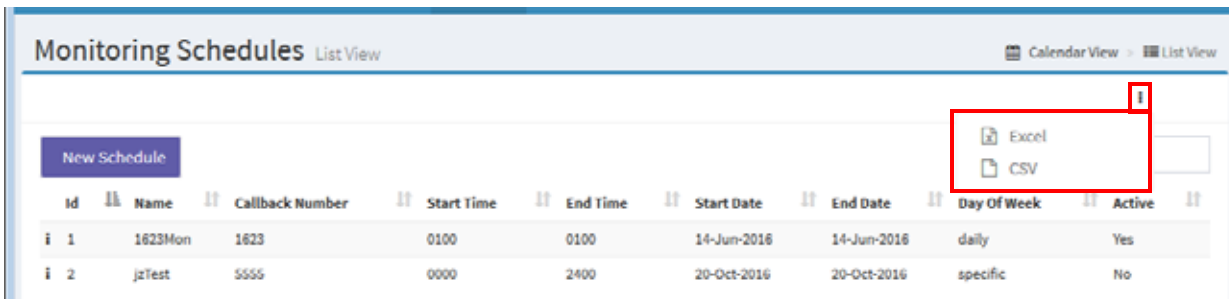
1. Open the **Call Monitoring** module and click the **Schedule** button on the menu bar.
2. In the list view, click the  button to the left of a listed schedule and select **Activate** or **Deactivate** from the drop-down list.



Exporting the Monitoring Schedule List


To export the monitoring schedule list to a data analysis tool such as Microsoft Excel:

1. Open the **Call Monitoring** module and then click the **Schedule** button on the menu bar.
2. In the list view, click the  button on the upper-right side of the page header and select **Excel** or **CSV**.
3. In the dialog box that opens, either click **Open** to open the file, or click **Save**, navigate to the directory where you want to save the file, and then click **Save**.



Deleting a Monitoring Schedule

To delete a monitoring schedule:

1. Open the **Call Monitoring** module and click the **Schedule** button on the menu bar.
2. In the list view, click the  button to the left of a listed schedule and select **Delete** from the drop-down list.
3. In the dialog box that opens, click **Yes** to confirm the deletion.

... 6 Historical Reports

CC-One provides a system-wide view into real-time and historical performance, allowing service levels to be optimized across sites. Reporting is performed on accumulated statistics captured by CC-One as it participates in cradle-to-grave management of calls. Users can create their own reports by selecting various data elements to include on a new report.

This chapter describes the available historical report data and explains how to display historical call, agent, skill, and auxiliary reports, as well as how to create and modify custom historical reports. For information on downloading report data to a data analysis tool, see [“Exporting Report Data” on page 199 in Chapter 4](#).

Note: Some of the data elements described in this chapter are not available in a system where calls are serviced by proxy queues.

Topics covered in this chapter:

- [Historical Call Reports](#)
- [Historical Agent Reports](#)
- [Agent Trace Report](#)
- [Auxiliary Reports](#)
- [Historical Skill Reports](#)
- [Historical Threshold Alerts](#)

See also:

- [“CC-One Report Parameters” beginning on page 427](#)
- [“Sorting, Reordering, and Navigating Report Grids” on page 150](#)

Historical Call Reports

Topics covered in this section:

- [Available Historical Call Report Data](#)
- [Displaying Historical Call Report Data](#)
- [Creating a Custom Historical Call Report](#)
- [Modifying a Historical Call Report](#)
- [Deleting a Historical Call Report](#)
- [Specifying a Different Default Historical Call Report](#)
- [Monitored Calls Reports](#)

Available Historical Call Report Data

Historical call reports provide cumulative and derived values for a specified time period and specified entry points, queues, sites, or teams. In addition, the *All DN Canned* report displays the calls that came into the system because of specific DNs (dialed numbers).

The parameters available for display in call reports are described in the following topics:

- [“Real-Time and Historical Parameters for Entry Points”](#) on page 154.
- [“Real-Time and Historical Parameters for Queues, Sites, and Teams”](#) on page 155

See also [“Differences Between Queue-Level versus Site and Team-Level Data in Reports”](#) on page 159.

In addition, you can drill down to display the call details for individual calls during a half-hour time period by selecting a date in the report grid, and then making a selection from the **Time** column. Or you can export the call details for all time periods during a selected day by clicking the *Show CDR* link on the grid panel header (see [“Displaying Historical Call Report Data”](#) beginning on page 226).

The following call detail record (CDR) parameters are available in the Call Details view for an entry point or queue.

You can click a link in the S. No (sequence number) column in either an entry point or queue CDR to open a window that displays a tree view of the history of that call throughout its life cycle—the tree view displays all the parameters described in the following table.

Note: To view call data based on skill requirements, see [“Displaying Historical Skill Reports”](#) on page 263 and [“Data Available in a Skills by Queues Report”](#) on page 265.

Parameter	Description	Entry Point CDR	Queue CDR
S No.	A sequence number identifying each leg of a call as it moves through the CC-One system. Click an entry in this column to open a window displaying the history of the call throughout its life cycle.	X	X
ANI	The ANI digits delivered with the call. ANI, or Automatic Number Identification, is a service provided by the phone company that delivers the caller's phone number along with the call.	X	X
DNIS	The DNIS digits delivered with the call. DNIS, or Dialed Number Identification Service, is a service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.	X	X
Entry Point	The name of the entry point associated with the call.	X	
Queue	The name of the queue associated with the call.	X	X
Site	The call center location to which the call was distributed.	X	X
Team	The name of the team to which the call was distributed.	X	X
Agent	The name of the agent who handled the call or a numeric ID code if the call was handled by a capacity-based team resource instead of by a CC-One agent.	X	X
Call Start Time	The time the call arrived at the entry point or queue.	X	X
Call End Time	The time the call was terminated.	X	X
Agent Start Time	The time the agent picked up the phone and began talking with the caller.		X
Call Duration	The amount of time between when the call arrived at the entry point or queue and when it was terminated.	X	X
IVR Time	The amount of time the call was in the IVR system.	X	X
Queue Time	The amount of time the call was in a queue waiting to be sent to a destination site.	X	X
Connected Time	The total amount of time the call was connected to an agent (talk time plus hold time).	X	X
Hold Time	The amount of time the call was on hold in this queue (for a queue CDR) or in all underlying queues (for an entry point CDR).	X	X
Wrap Up Time	The amount of time an agent spent in the Wrap-up state after handling the call.	X	X
Handle Time	The amount of time spent handling the call (connected time plus wrap-up time).	X	X
Consult Time	The amount of time an agent spent consulting with another agent while handling this call.	X	X
Conference Time	The amount of time an agent spent in conference with the caller and another agent.	X	X

Parameter	Description	Entry Point CDR	Queue CDR
CTQ Request Time	The amount of time between when consult-to-queue requests were initiated and when the consultations ended during the call.	X	X
Hold Count	The number of times the call was put on hold.		X
Consult Count	The number of times the agent consulted another agent during the call.		X
Conference Count	The number of times the agent established a conference call with the caller and another agent.		X
Blind Transfer Count	The number of times the call was transferred out of the queue by the agent without consulting first.		X
CTQ Request Count	The number of times consult-to-queue requests were initiated during the call.	X	X
No. of Transfers	The number of times the call was transferred by an agent.	X	X
Transferred Number	The phone number to which the agent transferred the call in an agent-to-DN transfer. This parameter appears in the CDR window that opens when you click an entry in the S No. (sequence number) column of either an entry point or queue CDR as described in step 7 on page 231 .		
Consult Errors	The number of times agents did not respond to a consult invitation.		X
Transfer Errors	The number of times an error occurred during the transfer process.		X
Handle Type	How the call was handled. Possible values: <ul style="list-style-type: none"> • park. The call was queued in the CC-One network and subsequently ended without being distributed to a site. • park_and_transfer. The call was queued in the CC-One network and subsequently distributed to a site. • straight_transfer. The call was distributed to a site upon arrival without being queued in the CC-One network. • ivr. The call was handled by the IVR but the caller disconnected before the call was transferred or parked. • unknown. This is the default value when no other value overrides it. 		X

Parameter	Description	Entry Point CDR	Queue CDR
Termination Type	<p>How the call was terminated. Possible values:</p> <ul style="list-style-type: none"> • abandoned. The call was terminated before being distributed to a destination site, but was in the system for longer than the time specified in the Short Call threshold provisioned for the enterprise. • agent_transfer. The call was transferred from one agent to another. • transfer_error. The call could not be transferred to the agent. • normal. The call ended normally. • reclassified. The call was sent to another entry point. • transferred. The call was transferred by an agent. • self_service. The call ended in the IVR. • short_call. The call was never connected and the total duration of the call was less than the specified Short Call threshold. • quick_disconnect. The call was connected, but the agent talk time for the call was less than the specified Sudden Disconnect threshold. • overflow. The call was transferred to the overflow destination number provisioned for the queue—typically because the call was queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent. 	X	X
Terminating Party	Whether the call was terminated by the agent or the caller.	X	
Record Flag	Whether or not the call was recorded by CC-One through the optional Call Recording feature.		X

Parameter	Description	Entry Point CDR	Queue CDR
Monitor Flag	<p>Whether or not the call was monitored, coached, or barged in on. Possible values:</p> <ul style="list-style-type: none"> • Not Monitored. The call was not monitored • Monitored. The call was monitored. • Whisper-Coach. While the call was being monitored, the monitoring supervisor coached the agent, but did not barge in on the call. • Barged-In. While the call was being monitored, the monitoring supervisor barged in on the call. The supervisor might have also coached the agent. (If the call was both coached and barged-in on, the value of this parameter is <i>Barged-In</i>). <p>For information about monitoring, see Chapter 5, “Call Monitoring,” beginning on page 207.</p>	X	X
Wrap Up	The wrap-up code that the agent gave for the call. Note that if the agent wraps up the call after the CDR is generated, the corresponding CDR will be updated after the agent selects the wrap-up code for that call.		X
Session ID	A value assigned by the system that uniquely identifies a call during its life cycle.	X	X

Displaying Historical Call Report Data

When you open the Historical Reports module, a default report displays the summary view of cumulative and derived values for the last seven days for entry points, queues, sites, or teams to which you have access privileges. From the summary view, you can drill down to a daily view that displays values in half-hour intervals for any day in the report. From the daily view, you can drill down to display the call details for all calls within any half-hour segment.

Alternatively, you can display a summary report that provide a monthly total for each selected queue, site, or team for a time interval of up 13 months; from this report, you can drill down to a summary view displaying each day in the month, and from there to a single daily view, and then to a call details view.

Summary and daily views include both charts and grids in panels that can be maximized and minimized as described in [“Showing and Hiding Report Panels”](#) on [page 149](#).

In a grid panel, you can click a column header to sort the data by that column, and click it again to reverse the sort order. To sort by additional columns, hold down the CTRL key while you click a second and subsequent headings.

Notes:

- Date and time values in reports are based on the time zone provisioned for your enterprise (typically headquarters), *not* the local time zone for the sites and teams.
- Because some report parameters are not meaningful for outdial calls, CC-One recommends that you view inbound and outdial call data separately.

To display historical call report data:

1. Open the **Historical Reports** module.

The default Historical Reports page appears.

2. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel on the left side of the page.
3. To display different statistics, select the settings you want from the lists in the Report Filter panel:

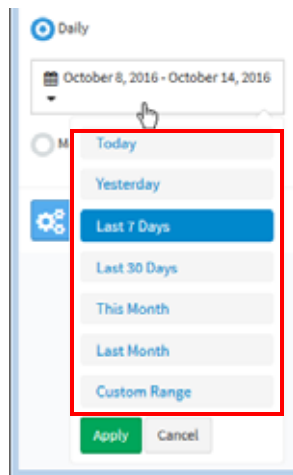
- a. Select a value from the **Display Results By** list to specify whether you want to display results by entry point, queue, site, team, or, if you are displaying the *All DN Canned* report, by DN.

When you select **DN**, an additional field is displayed where you can enter one or more DNs separated by commas.

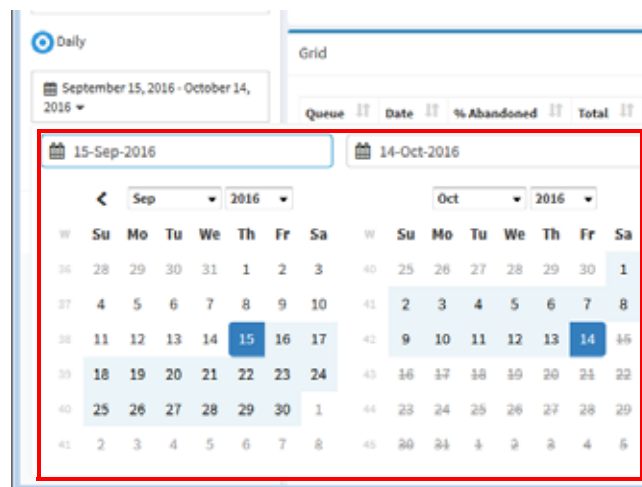
When you select **Site** or **Team**, additional buttons appear:

- **All Queues.** Select this option if you want display a daily summary report for selected sites or teams across all queues. Note that you cannot drill down to a daily or call details view from the report.
 - **Specify.** Select this option if you want to display a report that includes only those queues that you select, and the site or team data will be displayed by queue.
- b. Select one or more entry points, queues, sites, or teams that you want included in the report, or use the default **All** setting if available.
 - c. Select the parameter from the **Chart Parameter** list that you want to be displayed in the chart, and select the parameters from the **Grid Parameter** list that you want to be displayed as columns in the grid. For an explanation of the available parameters, see [“Call Interval Report Parameters” on page 153.](#)

- d. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.



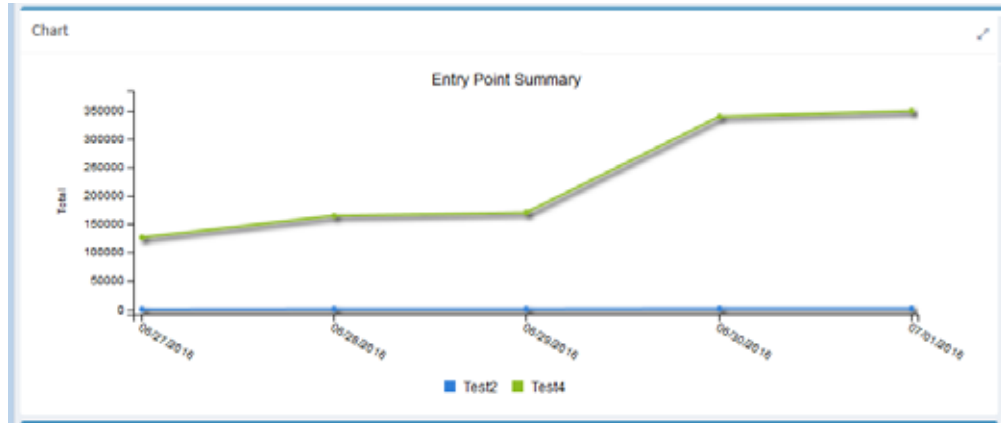
When you select **Custom Range**, additional controls appear for you to specify a date range of up to 92 days. Use the calendar controls to select start and end dates or type dates into the two fields.



- e. To create a monthly report, click the **Monthly** button and select a number between 1 and 13. Monthly reports provide monthly totals for each selected queue, site, or team, without providing a row of data for each day of the month
- f. Click **Apply** to view the report.

The top part of the report displays a chart summarizing completed calls during the report interval. Following is an example of a chart displaying new calls for two entry points.

Note: If the chart cannot be displayed, an error message appears instructing you to select fewer entities or limit the time duration. The chart can display up to 15 entities.



The bottom part of the report displays daily or monthly data for each entry point, queue, site, or team, depending on the criteria you selected for the report. Following is an example of a report displaying daily results for two entry points.

Click a date in the Date column to drill down to a half-hourly view of data for that day.

Entry Point	Date	Total	New	From Entry Point	Transferred In	IVR Ended	Short	To Entry Point	To Queue
Total		1157176	1146247	0	10929	30468	0	0	1158
Test2	27-Jun-16	439	10	0	429	438	0	0	
Test4	27-Jun-16	126913	126485	0	428	15323	0	0	127
Test2	28-Jun-16	994	0	0	994	992	0	0	
Test4	28-Jun-16	164942	163958	0	984	2009	0	0	165
Test2	29-Jun-16	988	0	0	988	983	0	0	
Test4	29-Jun-16	170617	169708	0	909	1823	0	0	170
Test2	30-Jun-16	1589	0	0	1589	1506	0	0	1
Test4	30-Jun-16	339663	338172	0	1491	2831	0	0	339
Test2	01-Jul-16	1573	0	0	1573	1526	0	0	1
Test4	01-Jul-16	348478	347914	0	1964	2837	0	0	349

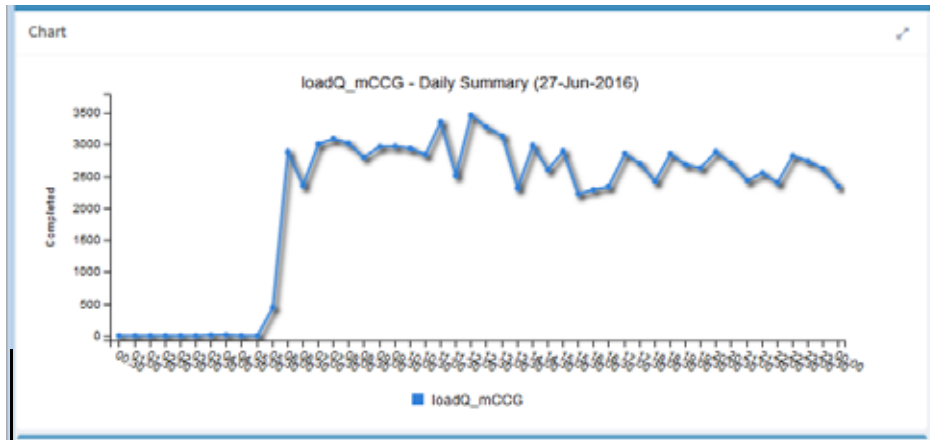
You can click a column header to sort the data by that column, and click it a second time to reverse the sort order of the data. To sort by additional columns, hold down the CTRL key while you click a second and subsequent headings.

The grid can display up to 100 rows on a page. If more than one page of data is available, controls at the bottom of the grid provide access to other pages.

- If you are viewing a monthly summary report, you can drill down to a daily summary view of data for a specific DN, entry point, queue, site, or team (depending on the criteria you selected for the report), by clicking a month in the **Date** column.

If you are viewing a daily summary report, you can drill down to a half-hourly view of data by clicking a date in the **Date** column.

The upper part of the report displays a daily summary chart, as shown in the following example.



The bottom part of the report displays values in half-hour segments for the day, as shown in the following example.

Click an entry in the **Time** column to drill down to view call details for that half-hour interval.

Click the **Show CDR** link to export call details for the entire day.

Queue	Time	Service Level %	Adjusted Service Level %	In Service Level	% Answered	% Abandoned
Total		98.07	98.97	110686	98.68	
loadQ_mCCG	00:00-00:30	0.0	0.0	0	0.0	
loadQ_mCCG	00:30-01:00	0.0	0.0	0	0.0	
loadQ_mCCG	01:00-01:30	0.0	0.0	0	0.0	
loadQ_mCCG	01:30-02:00	0.0	0.0	0	0.0	
loadQ_mCCG	02:00-02:30	0.0	0.0	0	0.0	
loadQ_mCCG	02:30-03:00	0.0	0.0	0	0.0	
loadQ_mCCG	03:00-03:30	0.0	0.0	0	0.0	
loadQ_mCCG	03:30-04:00	0.0	0.0	0	0.0	
loadQ_mCCG	04:00-04:30	0.0	0.0	0	0.0	
loadQ_mCCG	04:30-05:00	0.0	0.0	0	0.0	
loadQ_mCCG	05:00-05:30	100.0	100.0	923	100.0	
loadQ_mCCG	05:30-06:00	99.93	99.93	2753	100.0	

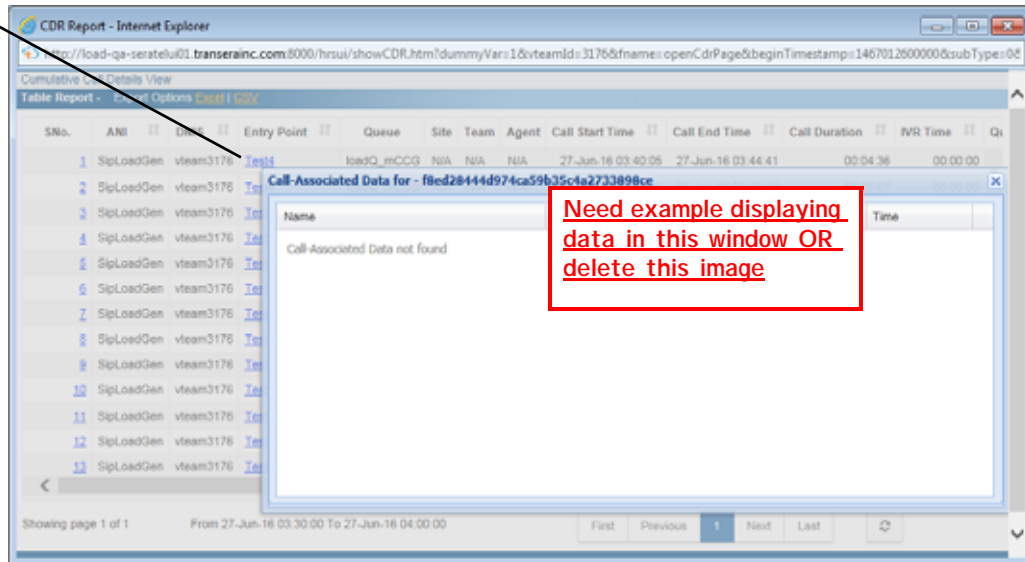
- To view call details, click an entry in the **Time** column.

The CDR Report window opens, displaying cumulative call details (for an entry point report) or call details (for a queue report) for all calls in the half-hour time interval you selected. For a description of each parameter that can appear in a call details view, see [“Available Historical Call Report Data” on page 222](#).

To export call details for the entire day, click the **Show CDR** link on the grid panel header.

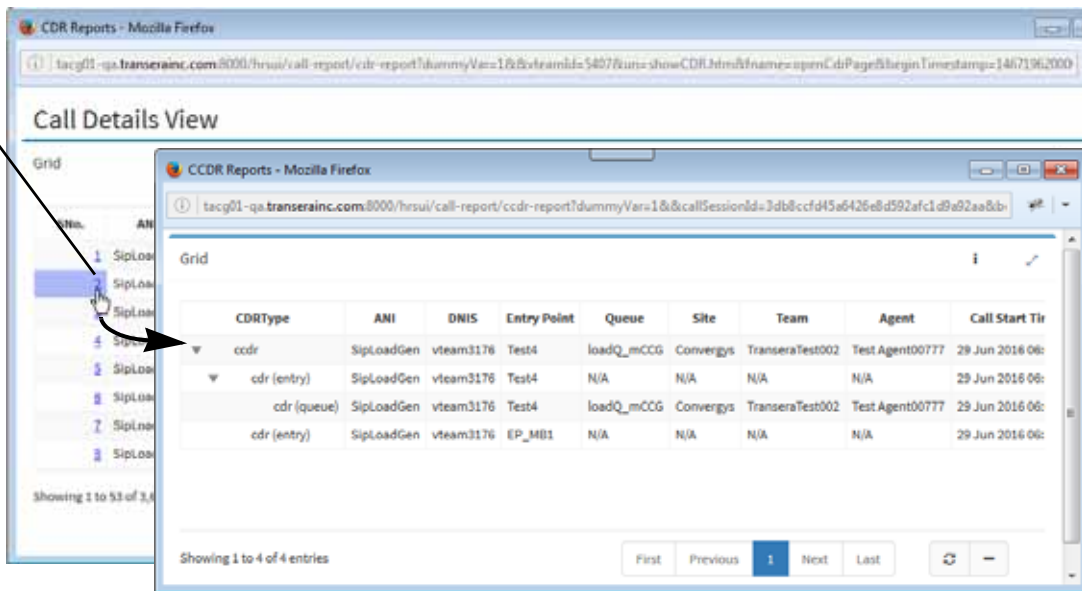
- From the CDRR view, you can display call-associated data (CAD) collected for a call by clicking an entry in the **Entry Point** column.

Click an entry in this column to display call-associated data.



- From a CDRR view or a CDR view, you can click an entry in the **S No.** (sequence number) column to open a window displaying the history of that call throughout its life cycle.

Click an entry in this column to open a window displaying call history.




As shown in the above example, the window can display a hierarchy of up to four CDR types, depending on what happened to the call.

CDR Type	Description
ccdr	The cumulative CDR (CCDR) represents the complete life cycle of an external call at a very high level, from the time it arrived at an entry point until it was terminated.
cdr (entry point)	The CDR for an entry point represents the history of the call from the time it arrived at the entry point—either as a new, external call or as a call transferred from another entry point or queue—until it left the underlying queues either by terminating or by being transferred out of a queue to another entry point.
cdr (queue)	The CDR for a queue represents the history of the call from the time it entered the queue until the call was either terminated or transferred out of the queue. A queue CDR can have multiple legs, which are represented by segment detail records (SDRs).
sdr	When an agent transfers a call to another agent, a segment detail record (SDR) is created for each leg of the call. In the above example, one agent-to-agent transfer took place, resulting in sdr (1) and sdr (2).

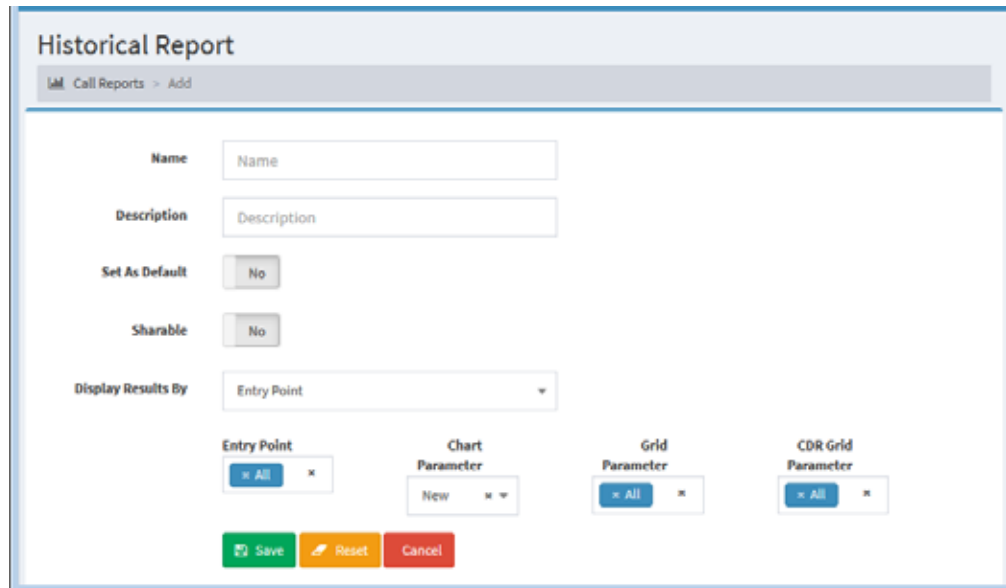
Creating a Custom Historical Call Report

To create a custom historical call report:

1. Open the **Historical Reports** module. The Call Reports default page appears.
2. Click the **Call Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
 - Click the **New Report** button on the upper-left side of the page.
 - OR-
 - To copy an existing report, click the  button to the left of a listed report and select **Copy** from the drop-down list.
4. On the page that appears, specify the settings for the report as described in the following table, and then click **Save**.

After the new report is saved, it will be available for selection from the Reports drop-down list on the Historical Reports landing page and will be listed in the Customize Reports page with your login name displayed in the *Created By* column.

Note: After saving a default custom report, wait 10 to 15 seconds before logging out. Otherwise, your parameter settings might not be saved.





Setting	Description
Name	Enter a name for the report.
Description	Optionally, enter a short description of the report.
Set as Default	Select Yes if you want this report to be displayed when you open the Historical Reports module. Note: You must log out and log in again for the new default to take effect.
Sharable	Select Yes if you want everyone who has access to the CC-One Historical Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by entry point, queue, site, or team, and then select the entry points, queues, sites, or teams you want included in the report.
Chart Parameter	Select the single parameter that you want displayed in the report chart.
Grid Parameter	Select the parameters that you want displayed as columns in the summary and daily report views. For an explanation of the available parameters, see “Call Interval Report Parameters” on page 153.
CDR Grid Parameter	Select the parameters to be displayed as columns in the call details view. For an explanation of the available parameters, see “Available Historical Call Report Data” on page 222.

Modifying a Historical Call Report

Note: Canned reports cannot be modified.


To modify a historical call report:

1. Open the **Historical Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the  button to the left of a listed report and select **Edit** from the drop-down list.
4. Make the changes you want. For information about the available settings, see [“Creating a Custom Historical Call Report”](#) on page 232.
5. Click **Save** to save your changes.
6. To view the report, click the  button to the left the listed report and select **View** from the drop-down list.

Deleting a Historical Call Report

Note: Canned reports cannot be deleted.


To delete a historical call report:

1. Open the **Historical Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the  button to the left of the report you want to delete and select **Delete** from the drop-down list.

Specifying a Different Default Historical Call Report

When you open the Historical Reports module, the default report appears.

To specify a different default historical call report:

1. Open the **Historical Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the  button to the left of a listed report that is not canned and select **Set as Default** from the drop-down list.

Monitored Calls Reports

Monitored Calls reports enabled authorized users to display historical views of call monitoring sessions.

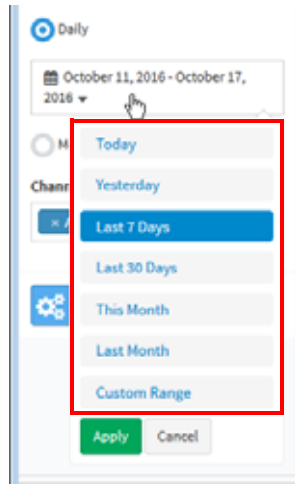
To view a monitored calls report:

1. Open **Historical Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Monitored Calls** from the drop-down list.

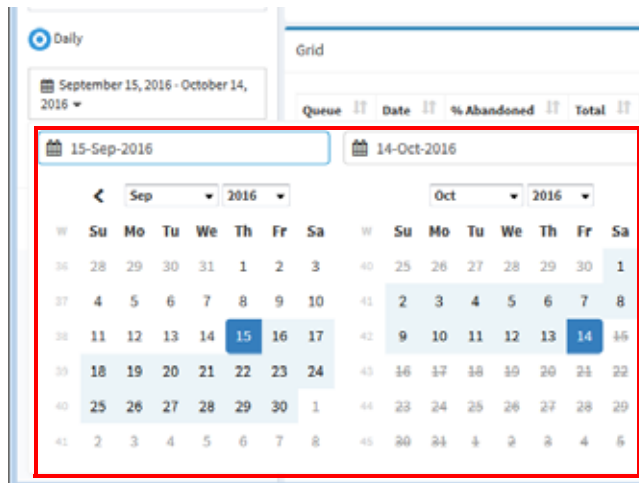
The default Monitored Calls page is displayed.

3. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel on the left side of the page.
4. To display different statistics, select the settings you want from the lists in the Report Filter panel:
 - a. Select a value from the **Display Results By** list to specify whether you want to display results by queue, site, or team.
 - b. Select one or more queues, sites, or teams that you want included in the report, or use the default **All** setting.
 - c. Select a parameter for the report chart.

- d. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select the time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.



When you select **Custom Range**, additional controls appear for you to specify a date range of up to 92 days. Use the calendar controls to select start and end dates or type dates into the two fields.



- e. To create a monthly report, click the **Monthly** button and select a number between 1 and 13.
- f. Click **Apply** to view the report.

The summary view displays the information described in the following table.

Click a Month entry to drill down to a summary of values for each day in that month.

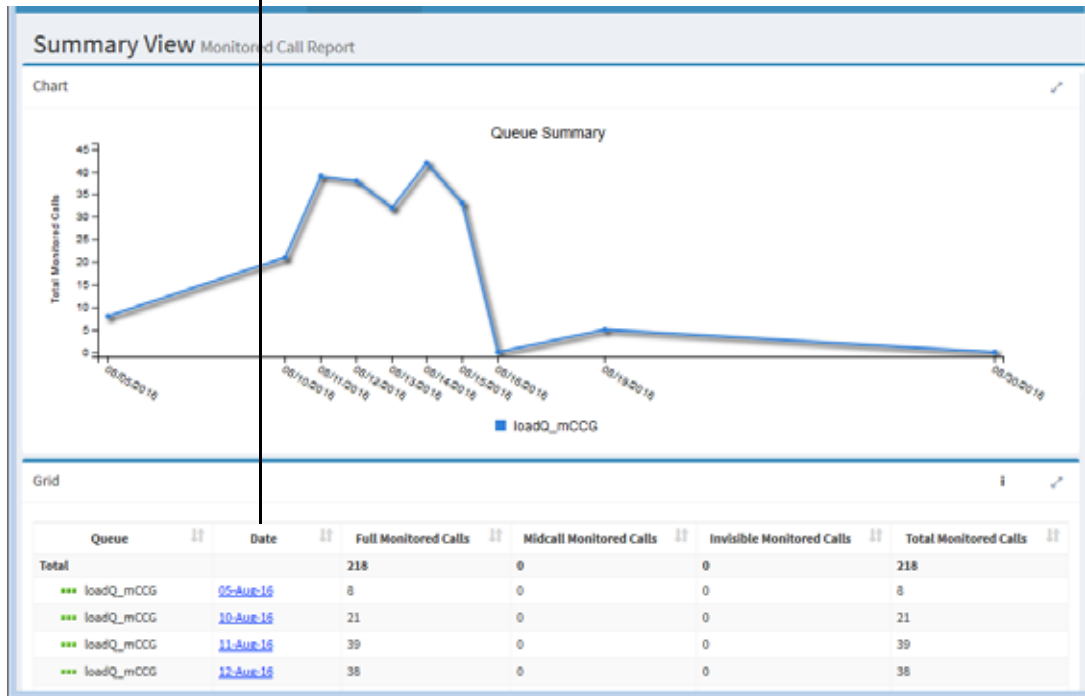


Column	Description
Queue/Site/Team	The name of the queue, site, or team that was monitored.
Month	A month in the report. This column appears only when you specify a Monthly time interval.
Date	A date in the report. This column appears when you select a Daily time period or when you drill down on an entry in the Month column of a monthly report.
Full Monitored Calls	The number of calls that were monitored from beginning to end.
Midcall Monitored Calls	The number of calls for which monitoring began after the call was already in progress.
Invisible Monitored Calls	The number of calls that were monitored using the Invisible mode, which prevents the monitoring session from being displayed on Management Portals other than that of the initiating supervisor.
Total Monitored Calls	The total number of calls monitored during the interval.

- If you selected a Monthly time period, you can click an entry in the **Month** column to drill down to a view displaying information for each day in that month.

If you selected any other time period, you can click an entry in the **Date** column to drill down to the Daily View displaying information in half-hour segments.

Click a time entry to drill down to call details for all the calls within that time interval.



- From the Daily View, click an entry in the **Time** column to display call details for all calls in the half-hour time interval you selected.

The Call Monitoring Details View opens in a separate window, displaying the call detail parameters described in the table beginning on [page 223](#) as well as two additional parameters: *Supervisor Name*, which displays the name of the supervisor who monitored the call, and *Invisible Monitoring*, which specifies whether or not the call was monitored using the Invisible mode.

Historical Agent Reports

Historical agent reports provide summary views of monthly or daily agent activity at the site, team, or agent level for a specified time period. From summary views, you can drill down to display half-hourly interval reports or agent detail reports. From an agent detail report, you can display detailed information about the calls the agent handled on the day covered in the report.

Note: Historical agent team reports are available only for agent-based teams.

Topics covered in this section:

- [Data Available in Historical Agent Summary and Interval Reports](#)
- [Displaying a Historical Agent Summary Report](#)
- [Displaying a Historical Agent Interval Report for a Site or Team](#)
- [Displaying a Historical Interval Report for an Individual Agent](#)
- [Displaying a Historical Agent Detail Report](#)
- [Displaying Agent Call Detail Records](#)
- [Creating or Modifying a Custom Historical Agent Report](#)
- [Deleting a Historical Agent Report](#)
- [Specifying a Different Default Historical Agent Report](#)

To view agent activity based on skill requirements for the calls the agents handled, see [“Displaying Historical Skill Reports”](#) on page 263.

Data Available in Historical Agent Summary and Interval Reports

In historical agent summary and interval reports, the report chart displays data based on the chart parameter you selected. The report grid displays the summary information described in the following table for one or more sites, teams, or agents.

Column	Description
Date	<p>In a summary report, this column displays the name of an agent, team, or site along with the dates on which activities occurred. Click a collapse arrow (▼) or expand arrow (►) next to the name of an agent, site, or team to collapse or expand the list of dates.</p> <p>If your enterprise uses the Multimedia feature and more than one media channel appears in the report, you can click the collapse arrow (▼) or expand arrow (►) to the left of a date to collapse or expand the channel details.</p>

Column	Description
Time	In an interval report, this column displays the time interval. If your enterprise uses the Multimedia feature and more than one media channel appears in the report, you can click a collapse arrow (▼) or expand arrow (►) to the left of a date to collapse or expand the channel details.
Login Count	Total number of times an agent logged in on that day. Appears only if Agents is selected in the Display Results By drop-down list.
Calls Handled	The total number of inbound and outdial calls handled.
Staff Hours	The total amount of time agents were logged in.
Initial Login Time	The date and time the agent logged in. This column appears only in agent-level summary reports.
Final Logout Time	The date and time the agent logged out. This column appears only in agent-level summary reports.
Occupancy	The measure of time agents spent on calls compared to available and idle time (Total Inbound Connected Time + Total Wrap Up Time + Total Outdial Connected Time + Total Outdial Wrap Up Time, divided by Staff Hours).
Idle	Count. The number of times an agent went into the Idle state. Total Time. The total amount of time agents spent in the Idle state. Average Time. The average length of time agents were in the Idle state (Total Idle Time divided by Idle Count).
Available	Count. The number of times an agent went into the Available state. Total Time. The total amount of time agents spent in the Available state. Average Time. The average length of time agents were in the Available state (Total Available Time divided by Available Count).
Inbound Reserved	Count. The number of times an agent went into the Inbound Reserved state. Total Time. The total amount of time agents spent in the Reserved state, during which a call is coming in to an agent's station but has not yet been answered. Average Time. The average length of time agents were in the Inbound Reserved state (Total Available Time divided by Available Count).

Column	Description
Inbound Connected	<p>Hold Count. The number of times an agent put an inbound caller on hold.</p> <p>Connected Count. The number of inbound calls that were connected to an agent.</p> <p>Total Talk Time. The total amount of time an agent was talking with a caller.</p> <p>Total Hold Time. The total amount of time inbound calls were on hold.</p> <p>Total Time. The total amount of time agents were connected to inbound calls.</p> <p>Average Hold Time. The average hold time for inbound calls (Total Hold Time divided by Hold Count).</p> <p>Average Time. The average inbound connected time (Total Time divided by Connected Count).</p>
Outdial Reserved	<p>Count. The number of times an agent was in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet.</p> <p>Total Time. The total amount of time agents were in the Outdial Reserved state</p> <p>Average Time. The average amount of time agents were in the Outdial Reserved state (Total Time divided by Count).</p>
Outdial Connected	<p>Attempted Count. The number of times an agent attempted to make an outdial call.</p> <p>Connected Count. The number of outdial calls that were connected to an agent.</p> <p>Hold Count. The number of times an agent put an outdial call on hold.</p> <p>Total Talk Time. The total amount of time an agent was talking with a party on an outdial call.</p> <p>Total Hold Time. The total amount of time outdial calls were on hold.</p> <p>Total Time. The total amount of time agents were connected to outdial calls.</p> <p>Average Hold Time. The average hold time for outdial calls (Total Hold Time divided by Hold Count).</p> <p>Average Time. The average outdial connected time (Total Time divided by Connected Count).</p>
Disconnected Count	The number of calls that were connected to an agent, but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.

Column	Description
Inbound Wrap Up	<p>Count. The number of times agents went into the Wrap-up state after an inbound call.</p> <p>Total Time. The total amount of time agents spent in the Wrap-up state after an inbound call.</p> <p>Average Time. The average length of time agents were in the Wrap-up state after an inbound call (Total Wrap Up Time divided by Wrap Up Count).</p>
Outdial Wrap Up	<p>Count. The number of times agents went into the Wrap-up state after an outdial call.</p> <p>Total Time. The total amount of time agents spent in the Wrap-up state after an outdial call.</p> <p>Average Time. The average length of time agents were in the Wrap-up state after an outdial call (Total Outdial Wrap Up Time divided by Outdial Wrap Up Count).</p>
Not Responding	<p>Count. The number of times an agent was in the Not Responding state.</p> <p>Total Time. The total amount of time agents spent in the Not Responding state.</p> <p>Average Time. The average length of time agents were in the Not Responding state (Total Not Responding Time divided by Not Responding Count).</p>
Consult Answer	<p>Count. The number of times agents answered a consult request from another agent.</p> <p>Total Time. The total amount of time agents spent answering consult requests.</p> <p>Average Time. The average length of time agents spent answering consult requests (Total Consult Answer Time divided by Consult Answer Count).</p>
Consult Request	<p>Count. The number of times agents sent a consult request to another agent.</p> <p>Total Time. The total amount of time agents spent consulting other agents.</p> <p>Average Time. The average length of time agents spent consulting other agents (Total Consult Request Time divided by Consult Request Count).</p>
Consult	<p>Count. The number of times agents answered consult requests plus the number of times agents consulted other agents.</p> <p>Total Time. Total Consult Answer Time plus Total Consult Request Time.</p> <p>Average Time. The average length of consulting time (Total Consult Time divided by Consult Count).</p>
Conference	The number of times an agent initiated a conference call.

Column	Description
Inbound CTQ Request	Count. The number of times agents initiated a consult to queue while handling an inbound call. Total Time. The total amount of time agents spent answering consult-to-queue requests from an agent handling an inbound call.
Inbound CTQ Answer	Count. The number of times agents answered a consult-to-queue request from another agent who was handling an inbound call. Total Time. The total amount of time agents spent answering consult-to-queue requests from an agent handling an inbound call.
Outdial CTQ Request	Count. The number of times agents initiated a consult-to-queue request while handling an outdial call. Total Time. The total amount of time agents spent answering consult-to-queue requests from an agent handling an outdial call.
Outdial CTQ Answer	Count. The number of times agents answered a consult-to-queue request from another agent who was handling an outdial call. Total Time. The total amount of time agents spent answering consult-to-queue requests from an agent handling an outdial call.
Agent Transfer	The number of times an agent transferred an inbound call to another agent.
Agent Requeue	The number of times an agent requeued an inbound call.
Blind Transfer	The number of times an agent transferred an inbound call without consulting first.
Inbound Avg Handle Time	The average length of time spent handling an inbound call (Total Inbound Connected Time plus Total Wrap Up Time, divided by Inbound Connected Count).
Outdial Avg Handle Time	The average length of time spent handling an outdial call (Total Outdial Connected Time plus Total Outdial Wrap Up Time, divided by Outdial Connected Count).

Displaying a Historical Agent Summary Report

To display a historical agent summary report:

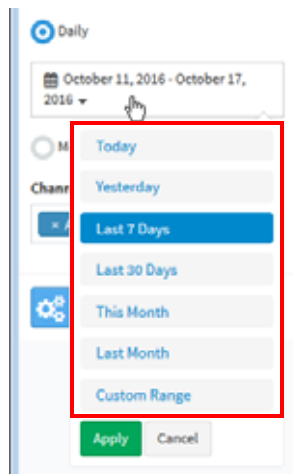
1. Open the **Historical Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **View Reports** from the drop-down list.

The default agent report page appears.

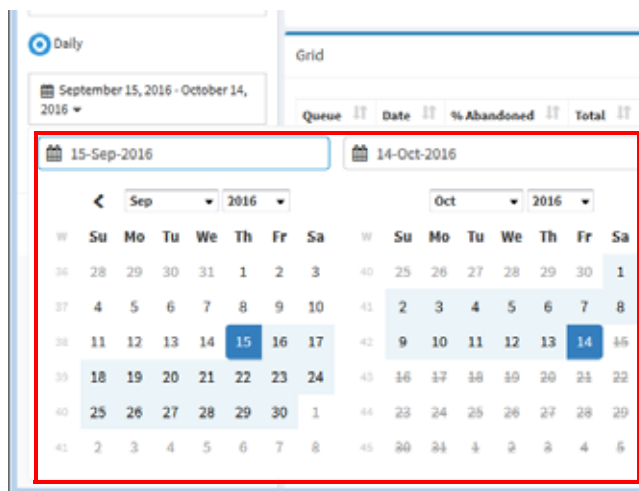
3. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel on the left side of the page.

4. To display different statistics, select the settings you want from the lists in the Report Filter panel:
 - a. Select a value from the **Display Results By** drop-down list in the Report Filter panel to specify whether you want to display results by sites, teams, or agents. Then select one or more sites, teams, or agents that you want covered in the report, or use the default **All** setting if available.

If you are selecting agents and you want deleted agents to be removed from from the list, select the **Exclude Deleted Agents** check box.
 - b. Select a parameter from the **Chart Parameter** drop-down list.
 - c. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select the time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.

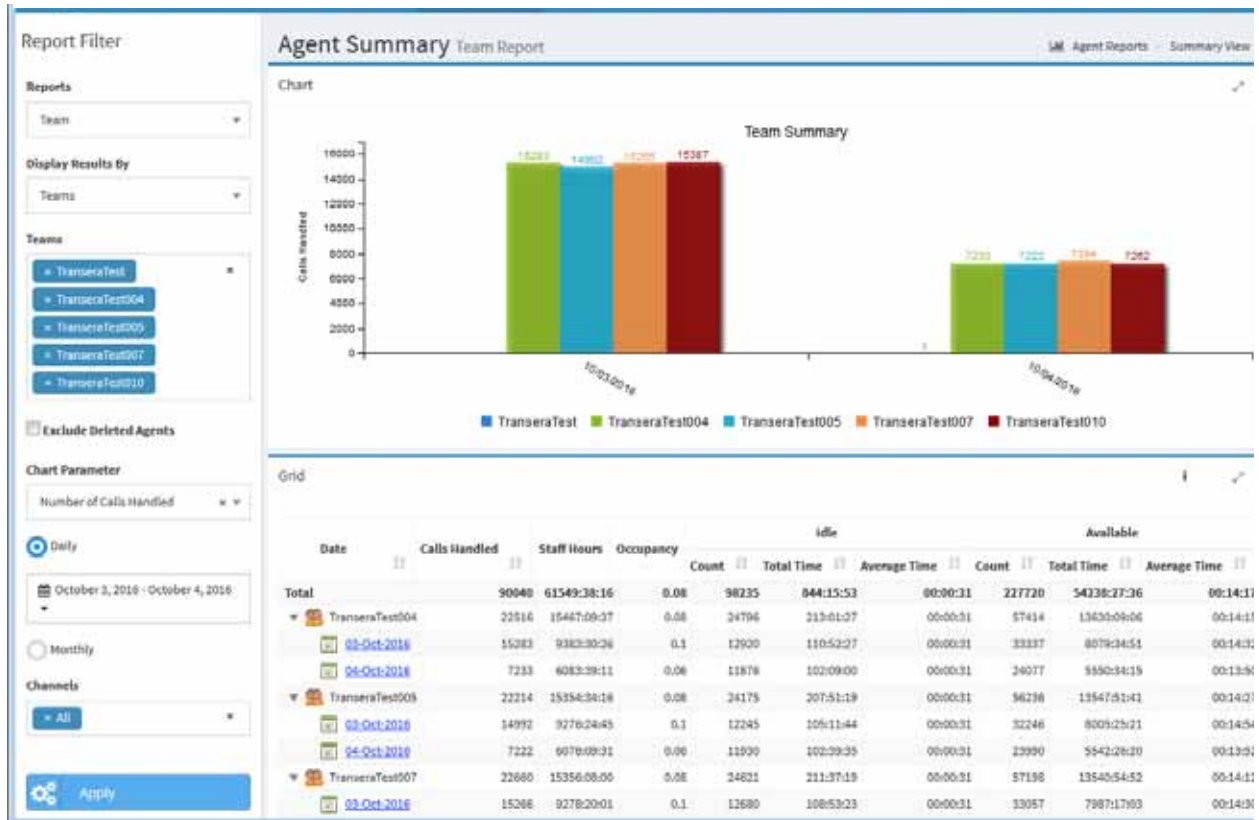


If you selected **Custom Range**, specify a date range of up to 92 days. You can either enter start and end dates in the two fields or use the calendar controls to specify the dates.



- d. To create a monthly report, click the **Monthly** button and select a number between 1 and 13.
- e. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.
- f. Click **Apply** to view the results.

Following is an example of a team-level agent summary report.



The report chart displays data based on the chart parameter you selected. The report grid displays the summary information described in [“Data Available in Historical Agent Summary and Interval Reports”](#) on page 239 for one or more sites, teams, or agents, based on your selection in the *Display Results By* list.

- If you are displaying results for sites or teams, click a date to drill down to a half-hourly view of data for that day (see [“Displaying a Historical Agent Interval Report for a Site or Team”](#) on page 246).
- If you are displaying results for agents, you can drill down to display detailed information about the activity of an individual agent (see [“Displaying a Historical Interval Report for an Individual Agent”](#) on page 247).

Use the controls at the bottom of the report grid to navigate through a multipage report, collapse or expand the grid rows, or reload the current page (as described in [“Using the Controls at the Bottom of a Grid”](#) on page 150).

To change the sort order in the report grid, click a column header to sort the data by that column, and click it a second time to reverse the sort order. To sort by additional columns, hold down the CTRL key while you click a second and subsequent headings.

Displaying a Historical Agent Interval Report for a Site or Team

To display a half-hourly historical agent interval report for a site or team:

1. Display an agent summary report as described in [“Displaying a Historical Agent Summary Report”](#) on page 243, selecting **Sites** or **Teams** in the **Display Results By** drop-down list.

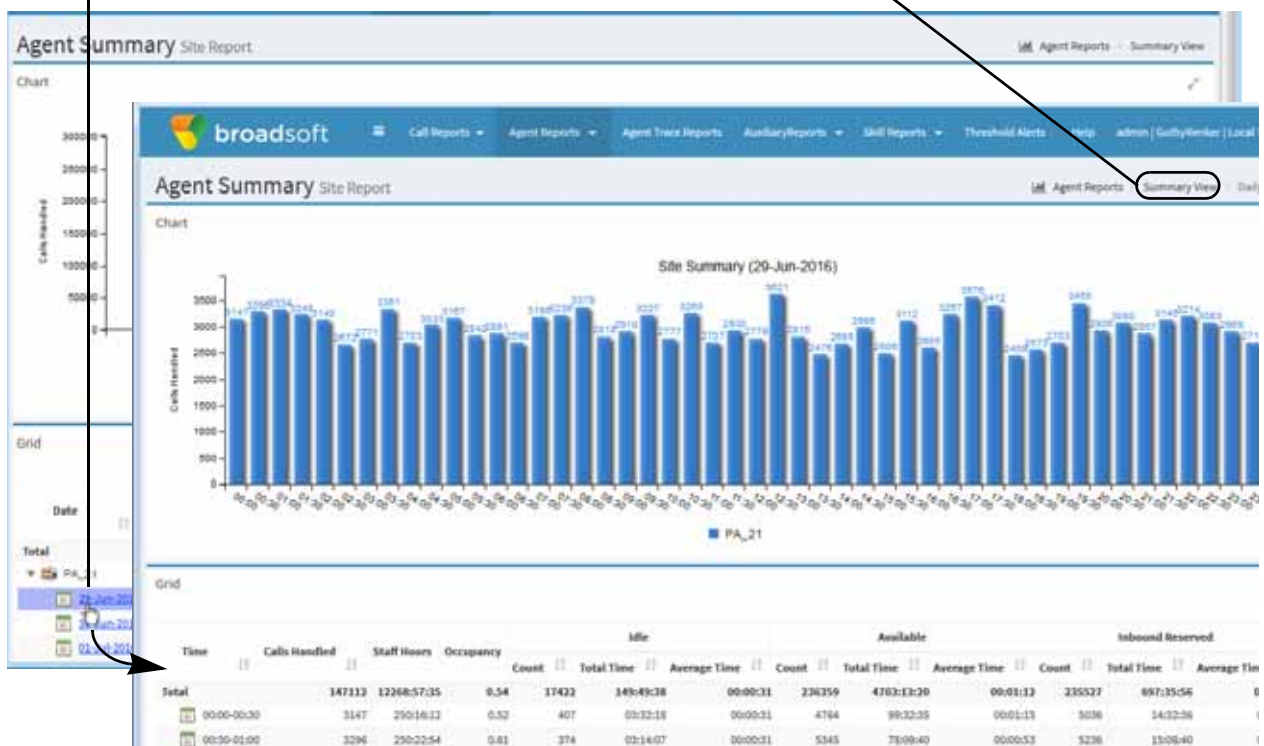
The agent summary report appears.

2. In the report grid, click a date to drill down to a half-hourly view of data for that day.

The site-level or team-level agent interval report appears. The report chart displays data based on the chart parameter you selected. The report grid displays the summary information described in [“Data Available in Historical Agent Summary and Interval Reports”](#) on page 239.

Click a date to display a half-hourly interval report for that day ...

... then you can click this link to redisplay the Summary report.



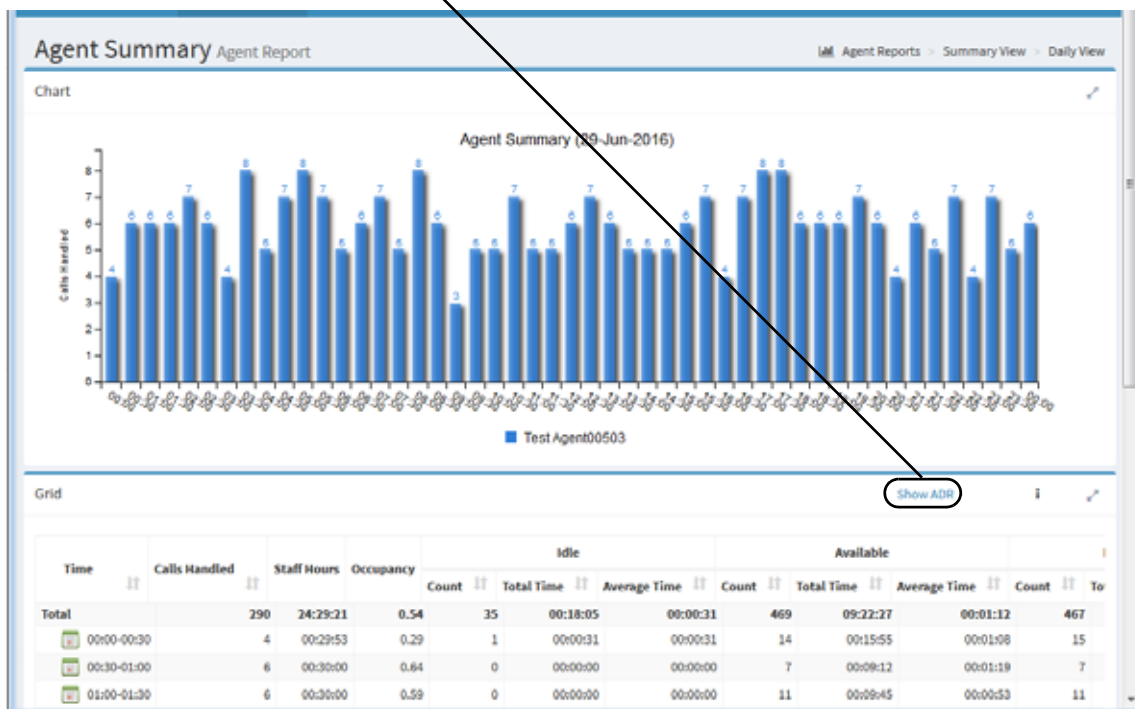
Displaying a Historical Interval Report for an Individual Agent

To display a half-hourly historical agent interval report for an individual agent:

1. Display an agent summary report as described in “[Displaying a Historical Agent Summary Report](#)” on page 243, selecting **Agent** in the **Display Results By** dropdown list and specifying the agents you want covered in the report.
2. Click a date in the report grid to display the agent detail report.
3. In the agent detail report, click the **Show Interval** link on the right side of the grid panel header.

The interval report for the agent appears. The report chart displays data based on the chart parameter you selected. The report grid displays the summary information described in “[Data Available in Historical Agent Summary and Interval Reports](#)” on page 239.

Click the **Show ADR** link to redisplay the agent detail report.



Displaying a Historical Agent Detail Report

You can drill down from the Agent Summary view to obtain details about the activity of an individual agent on a selected day.

To display a historical agent detail report:

1. Follow the instructions in “[Displaying a Historical Agent Summary Report](#)” on page 243, selecting **Agent** in the **Display Results By** drop-down list and specifying the agents you want covered in the report.

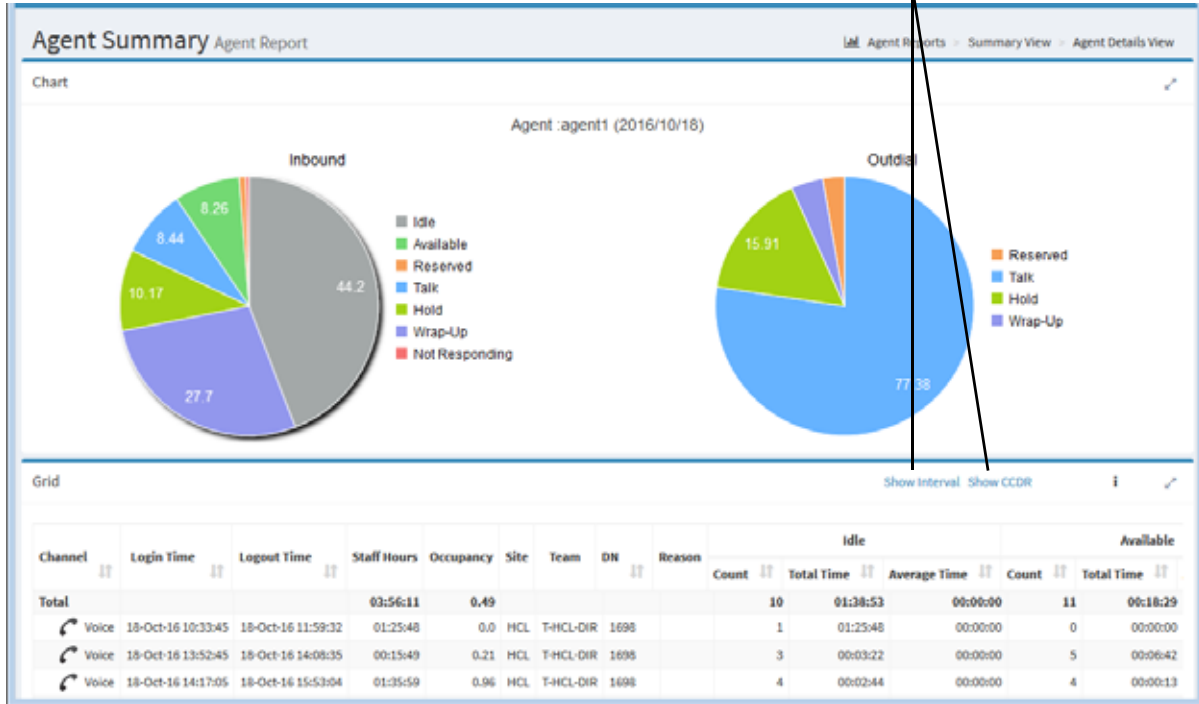
After you click **Apply**, the Agent Summary view appears.

Click a date to display the Agent Details view.



2. In the report grid, click a date. The Agent Details view appears.

These links provide access to an agent interval report and cumulative call detail records for the agent.



The report chart displays two pie charts. The chart on the left shows the percentage of time the agent spent in each agent state. If the agent participated in any outdial calls, the chart on the right shows the percentage of time the agent spent in each state during outdial calls.

The grid panel header displays links to the agent interval report and cumulative call detail records for the agent (for more information, see “[Displaying a Historical Agent Detail Report](#)” on page 248 and “[Displaying Agent Call Detail Records](#)” on page 253).

The report grid displays the date and login name of the agent along with the following information.

Column	Description
Channel	The media channel associated with the activity. Appears only if your enterprise uses the Multimedia feature.
Login Time	The date and time the agent logged in to the Agent Desktop.
Logout Time	The date and time the agent logged out of the Agent Desktop.
Staff Hours	The amount of time the agent was logged in during each login session.
Occupancy	The measure of time agents spent on calls compared to available and idle time (Total Inbound Connected Time + Total Wrap Up Time + Total Outdial Connected Time + Total Outdial Wrap Up Time, divided by Staff Hours)

Column	Description
Site	The site where the team the agent was handling calls for is located.
Team	The team the agent was handling calls for.
DN	The dial number the agent used to log in to the Agent Desktop.
Reason	<p>The reason the agent logged out. For example:</p> <ul style="list-style-type: none"> • Desktop browser closed. The browser window in which the Agent Desktop application was running was closed while the agent was logged in. • LoggingInAnotherInstance. The system logged the agent out because the agent logged in to another instance of the Agent Desktop. • Lost network connection. The agent was logged out because of a network interruption that exceeded two minutes (unless a different timeout is specified for your system). • Normal logout. The agent clicked the Log Out button in the Agent Desktop window. • Operational logout. The system logged the agent out in response to a command initiated by BroadSoft Operations or Technical Support. • Supervisory logout. The supervisor logged the agent out. <p>Other reasons can occasionally occur.</p>
Idle	<p>Count. The number of times the agent went into the Idle state.</p> <p>Total Time. The total amount of time the agent spent in the Idle state.</p> <p>% Time. The percentage of time the agent was in the Idle state.</p>
Available	<p>Count. The number of times the agent went into the Available state.</p> <p>Total Time. The total amount of time the agent spent in the Available state.</p> <p>% Time. The percentage of time the agent was in the Available state.</p>
Inbound Reserved	<p>Total Time. The amount of time the agent spent in the Reserved state, during which a call is coming in to the agent's station but has not yet been answered.</p> <p>% Time. The percentage of time the agent was in the Inbound Reserved state.</p>

Column	Description
Inbound Connected	<p>Hold Count. The number of times the agent put a caller on hold.</p> <p>Connected Count. The number of inbound calls that were connected to the agent.</p> <p>Total Talk Time. The total amount of time the agent was talking with a caller.</p> <p>Total Hold Time. The total amount of time inbound calls were on hold.</p> <p>Total Time. The total amount of time the agent was connected to inbound calls.</p> <p>% Talk Time. The percentage of inbound connected time the agent was talking with the caller.</p> <p>% Hold Time. The percentage of inbound connected time the caller was on hold.</p> <p>% Time. The percentage of time the agent was connected to an inbound call.</p>
Outdial Reserved	<p>Count. The number of times the agent was in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet.</p> <p>Total Time. The total amount of time the agent spent in the Outdial Reserved state.</p>
Outdial Connected	<p>Attempted Count. The number of times the agent attempted to make an outdial call.</p> <p>Connected Count. The number of outdial calls that were connected to the agent.</p> <p>Hold Count. The number of times the agent put an outdial call on hold.</p> <p>Total Talk Time. The total amount of time the agent was talking with a party on an outdial call.</p> <p>Total Hold Time. The total amount of time outdial calls were on hold.</p> <p>Total Time. The total amount of time the agent was connected to an outdial call.</p>
Disconnected Count	The number of calls that were connected to the agent, but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.
Inbound Wrap Up	<p>Count. The number of times the agent went into the Wrap-up state after an inbound call.</p> <p>Total Time. The total amount of time the agent spent in the Wrap-up state after an inbound call.</p> <p>% Time. The percentage of time the agent was in the Wrap-up state after an inbound call.</p>

Column	Description
Outdial Wrap Up	<p>Count. The number of times the agent went into the Wrap-up state after an outdial call.</p> <p>Total Time. The total amount of time the agent spent in the Wrap-up state after an outdial call.</p>
Not Responding	<p>Count. The number of times the agent went into the Not Responding state.</p> <p>Total Time: The total amount of time the agent spent in the Not Responding state.</p> <p>% Time. The percentage of time the agent was in the Not Responding state.</p>
Consult Answer	<p>Count. The number of times the agent answered a consult request from another agent who was handling an inbound call.</p> <p>Total Time. The total amount of time the agent spent answering consult requests.</p> <p>% Time. The percentage of time the agent spent answering consult requests.</p>
Consult Request	<p>Count. The number of times the agent sent a consult request to another agent while on an inbound call.</p> <p>Total Time. The total amount of time the agent spent consulting other agents while on an inbound call.</p> <p>% Time. The percentage of time the agent spent consulting other agents while on an inbound call.</p>
Consult	<p>Count. The number of times the agent answered consult requests plus the number of times the agent consulted other agents.</p> <p>Total Time. Total Consult Answer Time plus Total Consult Request Time.</p>
Conference	The number of times the agent initiated a conference call.
Inbound CTQ Request	<p>Count. The number of times the agent initiated a consult to queue while handling an inbound call.</p> <p>Total Time. The total amount of time between when the agent initiated a consult to queue while handling an inbound call and when the consultation ended.</p>
Inbound CTQ Answer	<p>Count. The number of times the agent answered a consult-to-queue request from another agent who was handling an inbound call.</p> <p>Total Time. The total amount of time the agent spent answering consult-to-queue requests from an agent handling an inbound call.</p>
Outdial CTQ Request	<p>Count. The number of times the agent initiated a consult to queue while handling an outdial call.</p> <p>Total Time. The total amount of time between when the agent initiated a consult to queue while handling an outdial call and when the consultation ended.</p>

Column	Description
Outdial CTQ Answer	<p>Count. The number of times the agent answered a consult-to-queue request from another agent who was handling an outdial call.</p> <p>Total Time. The total amount of time the agent spent answering consult-to-queue requests from an agent handling an outdial call.</p>
Agent Transfer	The number of times the agent transferred an inbound call to another agent.
Agent Requeue	The number of times the agent requeued a call.
Blind Transfer	The number of times the agent transferred a call without consulting first.
Inbound Avg Handle Time	The average length of time the agent spent handling an inbound call (Total Inbound Connected Time plus Total Wrap Up Time, divided by Inbound Connected Count).
Outdial Avg Handle Time	The average length of time the agent spent handling an outdial call (Total Outdial Connected Time plus Total Outdial Wrap Up Time, divided by Outdial Connected Count).

Displaying Agent Call Detail Records

The agent detail report includes a link that provides access to cumulative call detail records (CCDRs) for all calls that reached the agent on the day covered in the agent detail report.

To display call detail records for an agent:

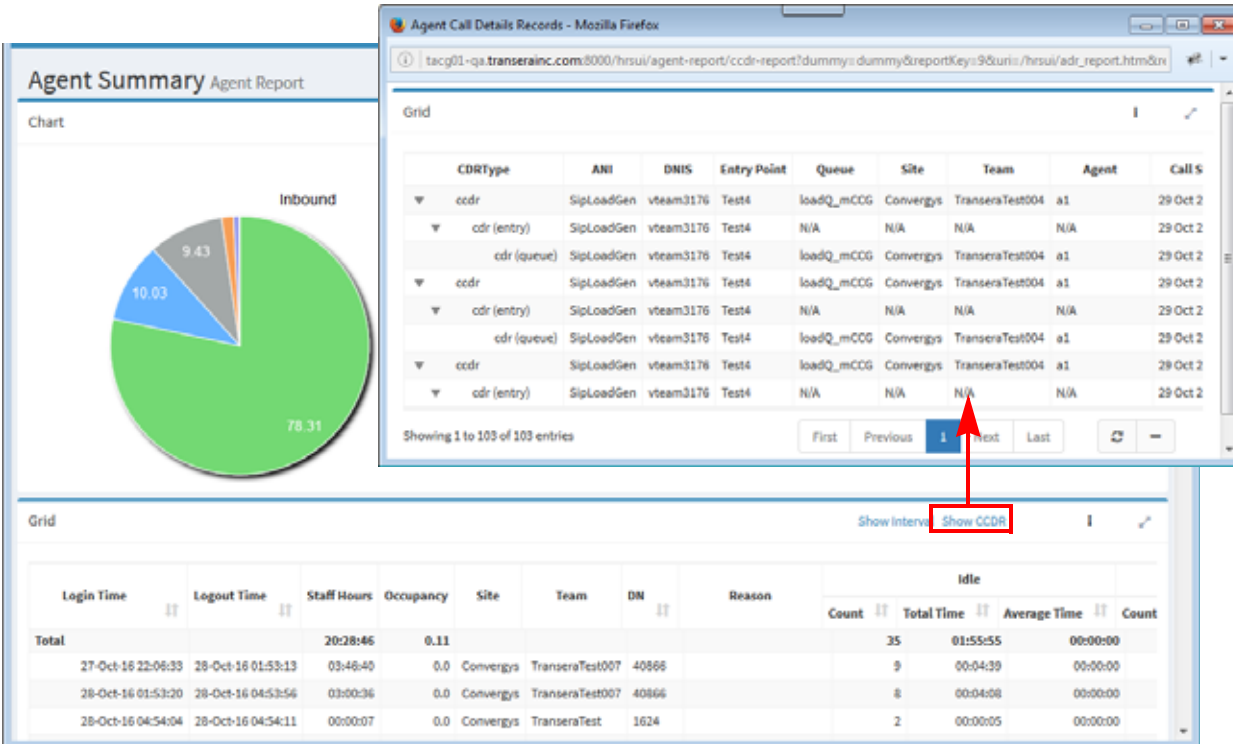
1. Display an agent summary report as described in [“Displaying a Historical Agent Summary Report” on page 243](#), selecting **Agents** in the **Display Results By** drop-down list and specifying the agents you want covered in the report.

The agent summary view appears. The report grid displays a summary row for each agent you selected, followed by a row of data for each day during which that agent was logged in.

2. In the report grid, click a date to display the Agent Details view.
3. In the Agent Details view, click the **Show CCDR** link in the grid panel header.

The Agent Call Detail Records report appears in a pop-up window.


- For a description of the information available in the report, see the table in [“Available Historical Call Report Data” on page 222](#).
- For a description of the four CDR types that can appear in the CDRTYPE column, see the table on [page 232](#).



Creating or Modifying a Custom Historical Agent Report

Note: Canned reports cannot be modified.

To create or modify a custom historical agent report:

1. Open the **Historical Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
 - Click the **New Report** button on the upper left side of the page and enter information in the data fields as described in the following steps.
 - OR-
 - Click the  button to the left of a listed report and select **Copy** or **Edit** from the drop-down list.
4. On the page that appears, specify the settings as described in the following table and then click **Save**.

After the report is saved, it will be available from the Reports drop-down list in the Historical Reports module, Agent Reports > View Reports page and will be listed in the Customize Reports page with your login name displayed in the *Created By* column.

Note: After saving a default custom report, wait 10 to 15 seconds before logging out. Otherwise, your parameter settings might not be saved.

The screenshot shows the 'Historical Report' configuration interface. It features several input fields and buttons:


- Name:** A text input field with the placeholder 'Name'.
- Description:** A text input field with the placeholder 'Description'.
- Set As Default:** A button labeled 'No'.
- Sharable:** A button labeled 'No'.
- Display Results By:** A dropdown menu currently set to 'Sites'.
- Sites:** A multi-select dropdown menu with 'All' selected.
- Agents:** A multi-select dropdown menu with 'All' selected.
- Chart Parameter:** A dropdown menu with 'Number of Calls Handled' selected.
- Buttons:** Three buttons at the bottom: 'Save' (green), 'Reset' (orange), and 'Cancel' (red).

Setting	Description
Name	Enter or modify the name for the report.
Description	Optionally, enter a short description of the report.
Set as Default	Select Yes if you want this report to be displayed the next time you access the Agent Reports > View Reports page in the Historical Reports module.
Sharable	Select Yes if you want everyone who has access to the CC-One Historical Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by site, team, or agent. Then select one or more sites, teams, or agents that you want covered in the report, or use the default All setting if available. When you select Agents in the Display Results By list, the page displays lists of available sites, teams, and agents. When you select one or more sites, the Teams list displays the names of the teams that serve those sites. When you select one or more teams, the Agents list displays the agents that belong to those teams.
Chart Parameter	Select the chart parameter that you want displayed in the report chart.

Deleting a Historical Agent Report


Note: Canned reports cannot be deleted.

To delete a historical agent report:

1. Open the **Historical Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, click the  button to the left of the listed report that is not canned and select **Delete** from the drop-down list.

Specifying a Different Default Historical Agent Report

When navigate to the Agent Reports > View Reports page in the Historical Reports module, the default report appears. To specify a different default report:

1. Open the **Historical Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, click the  button to the left of a listed report that is not canned and select **Set as Default** from the drop-down list.

Agent Trace Report

An agent trace report provides a view of all the activities that the agents in the report have been involved in over the course of a specified time period, including the time each agent logged in and logged out, and the time the agent entered and left the following states during each login session: Idle, Available, Talking, On Hold, Not Responding, Wrap Up, Consult-Answer, Consult-Request, and Conference.

To view an agent trace report:

1. Open the **Historical Reports** module and click the **Agent Trace Report** button on the menu bar.

The default agent trace report is displayed.

2. To display different statistics, select the settings you want from the lists in the Report Filter panel on the left side of the page.

- a. Select one or more agents that you want covered in the report.
- b. If you want to exclude deleted agents from the report, select the **Exclude Deleted Agents** check box.
- c. Click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.

If you selected **Custom Range**, specify a date range of up to 31 days: enter start and end dates in the fields that appear or use the calendar controls to specify the dates.

- d. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.
3. Click **Update Report**.

For each selected agent, the report displays the same details that are displayed in the agent detail report (see the table of column descriptions beginning on [page 249](#)).

Report Filter

Reports: Agent Trace Canned

Agent: All

Agent States: All

Exclude Deleted Agents

Daily

November 6, 2016 - November 12, 2016

Apply

Summary View LM Agent Trace Report - View

Grid

Agent	Login Time	Logout Time	Staff Hours	Occupancy	Site	Team	DN	Reason
Total	Total		05:35:46	0.1				
▼ a1								
▼ 11-Nov-2016								
Voice	11-Nov-16 00:27:57	11-Nov-16 01:18:46	00:50:49	0.2	Convoy	TranseraTest	1624	
Voice	11-Nov-16 02:19:14	11-Nov-16 03:24:43	01:05:29	0.0	Convoy	TranseraTest	1624	
Voice	11-Nov-16 04:06:49	11-Nov-16 04:26:03	00:19:13	0.0	Convoy	TranseraTest	1624	
Voice	11-Nov-16 04:33:39	11-Nov-16 04:38:44	00:05:06	0.0	Convoy	TranseraTest	1624	
Voice	11-Nov-16 04:40:35	11-Nov-16 04:43:10	00:02:35	0.0	Convoy	TranseraTest	1624	
Voice	11-Nov-16 04:44:54	11-Nov-16 04:46:01	00:01:07	0.0	Convoy	TranseraTest	1624	
Voice	11-Nov-16 04:46:46	11-Nov-16 04:52:28	00:05:41	0.0	Convoy	TranseraTest	1624	
Voice	11-Nov-16 04:53:09	11-Nov-16 05:04:24	00:11:16	0.0	Convoy	TranseraTest	1624	
Total	Total		05:35:46	0.1				

Showing page 1 of 1

First Previous 1 Next Last

- Click a date in the **Login Time** column to drill down to details about each state the agent was in during that login session.

Agent Transition Report - Mozilla Firefox

Agent Transition Report

Grid

State	In Time	Out Time	Duration
Loggedin	Friday, 11 Nov 2016 02:19:14		00:00:00
Idle (MyIdleCode)	Friday, 11 Nov 2016 02:19:14	Friday, 11 Nov 2016 02:19:26	00:00:12
Available	Friday, 11 Nov 2016 02:19:26	Friday, 11 Nov 2016 02:20:24	00:00:58
Idle (MyIdleCode)	Friday, 11 Nov 2016 02:20:24	Friday, 11 Nov 2016 02:20:55	00:00:30
Available	Friday, 11 Nov 2016 02:20:55	Friday, 11 Nov 2016 02:21:54	00:00:59
Idle (MyIdleCode)	Friday, 11 Nov 2016 02:21:54	Friday, 11 Nov 2016 02:21:54	00:00:00
Idle (ACW)	Friday, 11 Nov 2016 02:21:54	Friday, 11 Nov 2016 02:22:03	00:00:09
Available	Friday, 11 Nov 2016 02:22:03	Friday, 11 Nov 2016 02:22:34	00:00:31
Idle (MyIdleCode)	Friday, 11 Nov 2016 02:22:34	Friday, 11 Nov 2016 02:22:44	00:00:10
Available	Friday, 11 Nov 2016 02:22:44	Friday, 11 Nov 2016 02:24:07	00:01:22

Showing 1 to 10 of 18 entries

First Previous 1 Next Last

Column	Description
State	<p>The time the agent logged in and logged out and each state the agent was in during the login session:</p> <ul style="list-style-type: none"> • Available. The agent was available and waiting for calls. • Conference. The agent conferenced a call with another party. • Consult-Answer. The agent answered a consult request from another agent. • Consult-Request. The agent initiated a consultation with another agent. • Idle. The agent was logged in but not available for a specified reason (for example, lunch break, meeting). • Not Responding. The agent's phone rang but the agent did not answer within a specified period of time. • Hold. The agent placed a connected call on hold. • Talk. The agent was talking on an inbound call. • Wrap Up. The call ended but the agent was not ready for the next call.
In Time	The time the agent entered the state.
Out Time	The time the agent left the state.
Duration	The amount of time the agent was in the state.

Auxiliary Reports

Topics covered in this section:

- [Displaying Auxiliary Reports](#)
- [Creating or Modifying a Custom Auxiliary Report](#)

Displaying Auxiliary Reports

Auxiliary reports display call counts by agent, site, and team for wrap-up codes and idle codes used on the CC-One Agent Desktop. In addition, these reports show how long agents were in the state represented by each code.

You can specify the time period, one or more work types (values associated with idle and wrap-up codes for reporting purposes), and codes you want the report to cover, and can export the report data to either Microsoft Excel or .csv format. In addition, you can create and modify custom auxiliary reports as described in the next section, [“Creating or Modifying a Custom Auxiliary Report” on page 261](#).

To view an auxiliary report:

1. Open the **Historical Reports** module.
2. Click the **Auxiliary Reports** button on the menu bar and select either **View Wrap-up Reports** or **View Idle Reports** from the drop-down list.

The default report for wrap-up or idle codes appears.

3. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel.
4. To display different statistics, select the settings you want from the lists in the Report Filter panel:

- a. Select a value from the **Display Results By** list to specify whether you want to display results by sites, teams, or agents. Then select one or more sites, teams, or agents that you want covered in the report, or use the default **All** setting if available.

If you are selecting agents and you want deleted agents to be removed from from the list, select the **Exclude Deleted Agents** check box.

- b. From the **Work Types** list, select work types that you want the report to include or use the default **All** setting.
- c. From the **Wrap Up Codes** or **Idle Codes** list, select the idle or wrap-up codes that you want the report to include or use the default **All** setting.
- d. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.

If you selected **Custom Range**, specify a date range of up to 92 days: enter start and end dates in the fields that appear or use the calendar controls to specify the dates.


- e. To create a monthly report, click the **Monthly** button and select a number between 1 and 13. Monthly reports provide monthly totals for each selected site, team, or agent without providing a row of data for each day of the month
- f. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.

5. Click **Apply** to view the results.

Creating or Modifying a Custom Auxiliary Report

Note: You cannot modify a canned report.

To create or modify a custom auxiliary report:

1. Open the **Historical Reports** module.
2. Click the **Auxiliary Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, select the **Wrap Up** or **Idle** button on the upper-left side of the page to specify the kind of report you want to create or modify, and then do one of the following:
 - Click the **New Report** button.
 - OR-
 - To copy or modify an existing report, click the  button to the left of a listed report and select **Copy** or **Edit**.
4. On the page that appears, specify the settings as described in the following table and then click **Save**.

After the report is saved, it will be available from the Reports drop-down list on the appropriate Auxiliary Reports page and will be listed on the Customize Reports page with your login name displayed in the *Created By* column.

Note: After saving a default custom report, wait 10 to 15 seconds before logging out. Otherwise, your parameter settings might not be saved.

Setting	Description
Name	Enter or modify the name for the report.
Description	Optionally, enter a short description of the report.
Set as Default	Select Yes if you want this report to be displayed the next time you access the relevant Auxiliary Reports page (View Wrap-Up Reports or View Idle Reports). Note: You must log out and log in again for the new default to take effect.
Sharable	Select Yes if you want everyone who has access to the CC-One Historical Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by site, team, or agent. Then select one or more sites, teams, or agents that you want covered in the report, or use the default All setting if available. When you select Agents in the Display Results By list, the page displays lists of available sites, teams, and agents. When you select one or more sites, the Teams list displays the names of the teams that serve those sites. When you select one or more teams, the Agents list displays the agents that belong to those teams.
Work Types	Select one or more work types from the drop-down list or select All . The Auxiliary Codes list displays the codes associated with the selected work types.
Auxiliary Codes	Select one or more auxiliary codes that you want the report to include or select All .

Historical Skill Reports

Topics covered in this section:

- [Displaying Historical Skill Reports](#)
- [Data Available in a Skills by Queues Report](#)
- [Data Available in a Skills by Agents Report](#)
- [Creating or Modifying a Custom Historical Skill Report](#)
- [Deleting a Historical Skill Report](#)
- [Specifying a Different Default Historical Skill Report](#)

Displaying Historical Skill Reports

Historical skill reports provide summary views of monthly or daily call or agent activity for a specified time period based on skill requirements for the calls.

- The **Skills by Queues** report displays call data based on the skill requirements that were assigned to the calls within each queue covered in the report. You can drill down from a monthly summary to a daily summary and from a daily summary to half-hourly data for a specific day. In addition, you can drill down on a skill for skill escalation details.
- The **Skills by Agents** report displays metrics for each skill that was matched in connecting calls to agents.

To display a historical skill report:

1. Open the **Historical Reports** module.
2. Click the **Skill Reports** button on the menu bar and select **View Reports** from the drop-down list.

The default skill report page appears.

3. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel.
4. To display different statistics, select the settings you want from the lists in the Report Filter panel:
 - a. Select one or more queues or agents that you want covered in the report, or use the default **All** setting.

If you are selecting agents and you want deleted agents to be removed from the list, select the **Exclude Deleted Agents** check box.

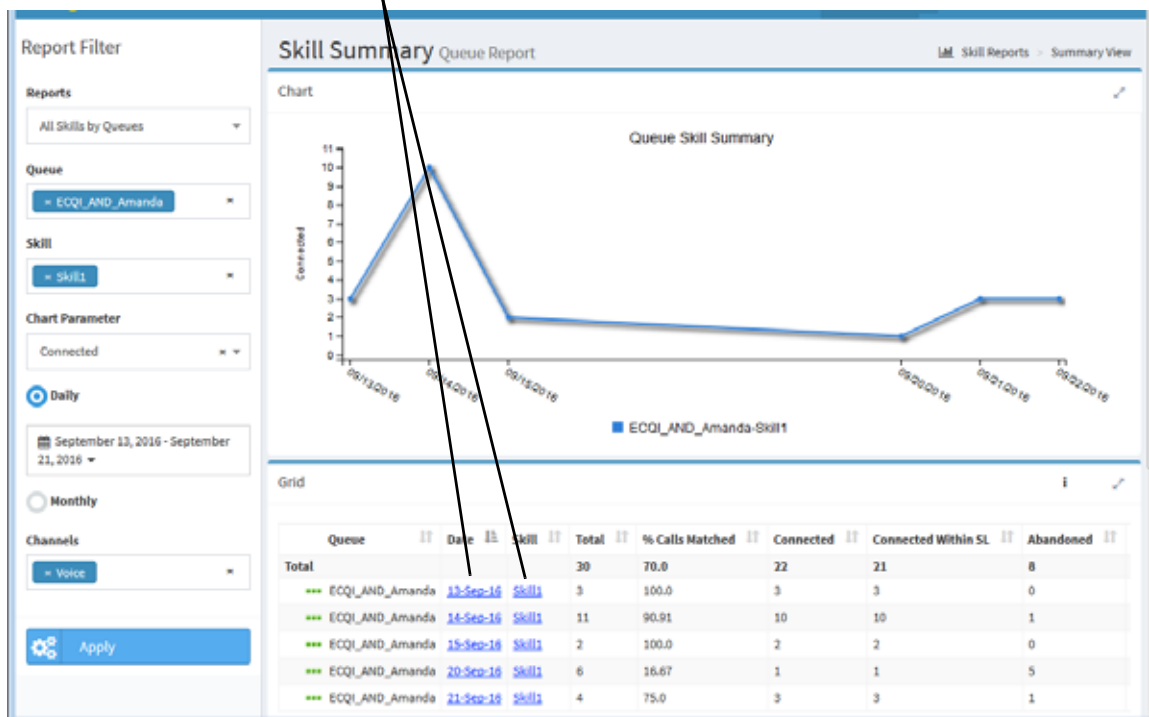
- b. Select one or more skills or use the default **All** setting.
- c. Select a parameter from the **Chart Parameter** drop-down list.
- d. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select a time period for the report from the drop-down list: **Today, Yesterday, Last 7 Days, Last 30 Days, This Month, Last Month, or Custom Range**.

If you selected **Custom Range**, specify a date range of up to 92 days: enter start and end dates in the fields that appear or use the calendar controls to specify the dates.

- e. To create a monthly report, click the **Monthly** button and select a number between 1 and 13.
- f. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.
- g. Click **Apply** to view the results.

Following is an example of a skills by queue summary report for a specific date range.

Click an entry in the **Date** or **Skill** column to drill down to a half-hourly view for that queue or skill.



The report chart displays data based on the chart parameter you selected. The report grid displays information for one or more skills and one or more queues or agents, based on your selections.

- If you selected Last Month(s) as the report duration, you can click an entry in the **Month** column to drill down to a summary of data for each day in that month when call activity occurred.
- In a daily summary view, you can click an entry in the **Date** column to drill down to a daily view that displays values in half-hour intervals for that day.
- In a skills by queues report, you can also click an entry in the **Skill** column to drill down to a daily summary view (from a monthly summary view) or half-hourly view of data for that day (from a daily summary view).
- If your enterprise uses the optional Multimedia feature and more than one media channel appears in the report, you can click the collapse arrow (▼) or expand arrow (►) next to the name of a queue (in a Skills by Queue report) or agent (in a Skills by Agent report) to collapse or expand the rows displaying channel details.

The parameters in the report grid are described in the following topics:

- [Data Available in a Skills by Queues Report](#)
- [Data Available in a Skills by Agents Report](#)

Data Available in a Skills by Queues Report

The following parameters are available in historical skills by queues reports. Asterisks (*) mark parameters that are available only in a skill summary report, which you can display by drilling down on a skill name.

Column	Description
Queue	The name of a queue. If your enterprise uses the Multimedia feature and more than one media channel appears in the report, you can click the collapse arrow (▼) or expand arrow (►) to the left of a queue name to collapse or expand the data grouped by channel type.
Month	The month during which the call activity occurred for that queue and skill. This column appears only if you specified <i>Last Month(s)</i> as the report duration. Click an entry in this column to drill down to a daily summary view of the data for that month.
Date	The date the call activity occurred for that queue and skill. Click an entry in this column to drill down to a half-hourly view of data for that day.
Time	The half-hour time interval during which the call activity occurred for that queue and skill.

Column	Description
Skill	The name of a skill. Click an entry in this column to drill down to view daily activity for the month (from a monthly summary) or to view half-hourly data for a day (from a daily summary).
Initial Operand*	The skill operand type that was assigned to the call when it was distributed to the queue. Possible values: <ul style="list-style-type: none"> • eq (equal to) • neq (not equal to) • gte (greater than or equal to) • lte (less than or equal to)
Final Operand*	The skill operand type that was assigned to the call when it was distributed to an agent with a matching skill.
Initial Value*	The value of the skill requirement assigned to the call when it arrived in the queue.
Final Value*	The value of the skill requirement assigned to the call when the call was distributed to an agent.
Total	The total number of calls.
% Calls Matched	The percentage of calls for which the initial value of the skill required by the call was equal to the final value when the call was distributed to an agent. (Matched Calls * 100) / (Connected + Abandoned + Reclassified)
Connected	The number of calls with this skill requirement that were connected during the report interval.
Connected within SL	The number of calls with this skill requirement that were connected within the Service Level threshold provisioned for this skill.
Abandoned	The number of calls with this skill requirement that were abandoned during the report interval.
Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for this skill.
Reclassified	The number of calls with this skill requirement that were transferred from the queue by the system.
Reclassified within SL	The number of calls with this skill requirement that were transferred from the queue by the system within the Service Level threshold provisioned for the skill.
Avg Handle Time	The average length of time spent handling a call with this skill requirement (total connected time plus total wrap-up time, divided by calls handled).

Data Available in a Skills by Agents Report


The following parameters are available in historical skills by agents reports.

Column	Description
Agent	The name of an agent. If your enterprise uses the Multimedia feature and more than one media channel appears in the report, you can click the collapse arrow (▼) or expand arrow (►) to the left of an agent name to collapse or expand the channel details.
Month	The month during which the call activity occurred for that agent and skill. This column appears only if you specified <i>Last Month(s)</i> as the report duration. Click an entry in this column to drill down to a daily summary view of the data for that month.
Date	The date the call activity occurred for that agent and skill. Click an entry in this column to drill down to a half-hourly view of data for that day.
Skill	The name of a skill.
Operand	The skill operand type that was assigned to the call when it was distributed to the agent. Possible values: <ul style="list-style-type: none"> • eq (equal to) • neq (not equal to) • gte (greater than or equal to) • lte (less than or equal to)
Value	The value of the skill requirement assigned to the call when the call was distributed to the agent.
Connected	The number of calls with this skill requirement that were connected during the report interval.
Connected within SL	The number of calls with this skill requirement that were connected within the Service Level threshold provisioned for this skill.
Avg Handle Time	The average length of time spent handling calls with this skill requirement (total connected time plus total wrap-up time, divided by calls handled).

Creating or Modifying a Custom Historical Skill Report

Note: You cannot modify a canned report.

To create or modify a custom skill report:

1. Open the **Historical Reports**.
2. Click the **Skill Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. Do one of the following:
 - Click the **New Report** button.
 - OR-
 - To copy or modify an existing report, click the  button to the left of a listed report and select **Copy** or **Edit** from the drop-down list.
4. On the page that appears, specify the settings as described in the following table and then click **Save**.

After the report is saved, it will be available from the Reports drop-down list in the Historical Reports module, Skill Reports > View Reports page and will be listed on the Customize Reports page with your login name displayed in the *Created By* column.


Note: After saving a default custom report, wait 10 to 15 seconds before logging out. Otherwise, your parameter settings might not be saved.

Setting	Description
Name	Enter or modify a name for the report.

Setting	Description
Description	Optionally, enter a short description of the report.
Set as Default	Select Yes if you want this report to be displayed the next time you access the Skill Reports > View Reports page in the Historical Reports module. Note: You must log out and log in again for the new default to take effect.
Sharable	Select Yes if you want everyone who has access to the CC-One Historical Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by or agent, and then select one or more queues or agents you want included in the report.
Skill	Select the skills you want included in the report or select All .
Chart Parameter	Select the parameter that you want displayed in the report chart.


Deleting a Historical Skill Report

To delete a historical skill report:

1. Open the **Historical Reports**.
2. Click the **Skill Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, click the  button to the left of the listed report you want to delete and select **Delete** from the drop-down list.

Specifying a Different Default Historical Skill Report

When navigate to the Skill Reports > View Reports page in the Historical Reports module, the default report appears. To specify a different default report:

1. Open the **Historical Reports** module.
2. Click the **Skill Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, click the  button to the left of a listed report that is not canned and select **Set as Default** from the drop-down list.

Historical Threshold Alerts

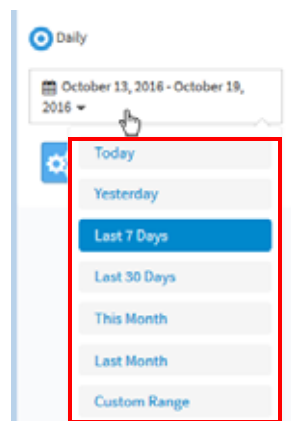
If your enterprise uses the Threshold Alerts feature and your user role authorizes you to view alerts, you can use the controls on the Threshold Alerts page of the Historical Reports module to display details about threshold alerts that were triggered between midnight of the current day and three months ago. (To view alerts that have been triggered since midnight, see [“Monitoring Threshold Alerts” on page 200.](#))

To display a historical threshold alert report:

1. Open the **Historical Reports** module and click the **Threshold Alerts** button.

The default threshold alerts page appears.

2. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel on the left side of the page.
3. To display different statistics, select the settings you want from the Report Filter panel:
 - a. Select a value from the **Display Results By** drop-down list to specify whether you want to display results by entry point, queue, site, team, or (if your enterprise uses the Agent Thresholds feature) agent. Then select one or more entry points, queues, sites, teams, or agents that you want covered in the report.
 - b. To specify the time period that you want the report to cover, click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.



When you select **Custom Range**, additional controls appear for you to specify a date range of up to 92 days. Use the calendar controls to select start and end dates or type dates into the two fields.

- c. Click **Apply** to view the results.

The report displays the following information for each archived threshold alert associated with each entry point, queue, site, or team in the report.

Agent	Time	Metric	Trigger Value	Operand	Actual Value	Trigger Interval	Acknowledged
agent1	21 Sep 2016 16:56:17	Current Idle Time	10	>	11	180	true
agent1	21 Sep 2016 16:56:17	Current Connected Time	30	>	34	180	true
agent1	21 Sep 2016 16:58:27	Current Hold Time	5	>	10	180	true
agent1	21 Sep 2016 17:01:17	Current Connected Time	30	>	180	180	true
agent1	21 Sep 2016 17:01:27	Current Hold Time	5	>	190	180	true
agent1	21 Sep 2016 17:04:17	Current WrapUp Time	5	>	5	180	true
agent1	21 Sep 2016 17:04:37	Current Available Time	10	>	13	180	true
agent1	21 Sep 2016 17:07:37	Current Available Time	10	>	196	180	true
agent1	21 Sep 2016 17:10:37	Current Available Time	10	>	376	180	true
agent1	21 Sep 2016 17:12:52	Current Connected Time	30	>	32	180	true
agent1	21 Sep 2016 17:15:52	Current Connected Time	30	>	212	180	true
agent1	21 Sep 2016 17:16:42	Current WrapUp Time	5	>	7	180	true

Column	Description
Time	The date and time that the threshold alert was triggered
Metric	The metric that the threshold is associated with.
Trigger Value	The value that the threshold rule defined as the trigger.
Operand	> (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to)
Actual Value	The actual value that triggered the alert.
Trigger Interval	The number of seconds specified in the threshold rule as the interval during which the system should generate only one alert for the threshold rule check.
Acknowledged	Whether or not a supervisor acknowledged the alert.
Acknowledged Time	The time the alert was acknowledged.
Comments	Optional comments, if any, entered by the supervisor who acknowledged the alert.
Supervisor	The name of the supervisor who acknowledged the alert.
Archived	Whether or not a supervisor archived the alert.



Call Recording

The optional Call Recording module enables authorized users to record any active call that is managed by the CC-One service.

Through a Web interface, authorized users can select which queue, team, site, and agent they want to record, and for what time period. After the recording schedules are created and saved, the system starts recording the next call that matches the criteria.

Recordings are transferred daily to your enterprise's recording repository over a secure encrypted virtual private network (VPN). The recording repository is a standalone server housed at a location of your enterprise's choosing, such as the call center premise location or data facility. Your enterprise has full control over the length of storage for these recordings.

The recordings are in standard .wav format and can be accessed directly by authorized individuals and reviewed using standard third-party utilities. Additionally, you can use the features of the optional CC-One Jukebox module to search for and play recorded files.

Note: Calls sent to the overflow destination number are not available for review through the CC-One Jukebox.

Topics covered in this chapter:


- [Creating or Editing a Recording Schedule](#)
- [Deleting a Recording Schedule](#)

Creating or Editing a Recording Schedule

To create or edit a call recording schedule:

1. Open the **Call Recording** module and on the page appears, select a queue from the **Queue** drop-down list.

All call recording schedules for that queue are displayed. From here, you can:

- Add a new schedule
 - Edit or view an existing schedule
 - Delete an existing schedule
 - Copy an existing schedule
 - Switch between a list view and calendar view of all schedules for this queue.
2. To create a new schedule:
 - From the list view, click **New Schedule**.
 - OR -
 - From the calendar view, point to the schedule's beginning date and click the **Create** link that appears in the upper-left corner of the date box.
 3. To copy or edit an existing schedule, from the list view, click the  button to the left of a listed schedule and select **Copy** or **Edit** from the drop-down list.
 4. On the page that appears, specify the appropriate settings as described in the following table, and then click **Save**.

New Recording Schedule

LM Recordings List > Add

General Settings

Enterprise: **Acme** Enterprise Time Zone: **Eastern Standard Time**

Name: Queue: **loadQ_mCCG**

Advanced Settings

Start Date: Start Time:

End Date: End Time:

Day Of Week: Sun Mon Tue Wed Thu Fri Sat

Status: Active

Recording Details

Stop Recording on Transferred Out Calls: No

Enable Pause Resume: No Pause Duration (in Sec):

Percentage:

Filter By: Sites: Teams: Agents:

Setting	Description
Name	Enter a name for the schedule.
Start Date End Date	To select the start date (the date the schedule becomes effective) and end date (the date the schedule expires), click the appropriate calendar icon, and then select a date from the calendar that appears.
Start Time End Time	Enter in 24-hour format (0000 to 2400) the time of day you want the schedule to start and end.
Days of Week	From the drop-down list, select All Days if you want the schedule to run every day or Weekdays if you want the schedule to run Monday through Friday only. -OR- Select each icon that represents a day during which you want the schedule to run.
Status	Select Active if you want the schedule to become effective at the specified start time on the specified start date. Otherwise, select Not Active .


Setting	Description
Stop Recording on Transferred Out Calls	Select On if you want recording to stop when a call is transferred.
Enable Pause Resume	Select On if you want the agent to have access to the Privacy Shield icon during call recording so that the agent can pause and resume recording. For example, the agent might need to pause potential call recording while obtaining a credit card number or other protected information. Be sure to instruct agents regarding when to use this feature. Note: The Privacy Shield icon is displayed on the Agent Desktop only if the Privacy Shield feature is enabled in your CC-One service configuration.
Pause Duration (in Sec)	If you set <i>Enable Pause Resume</i> to On , enter the number of seconds that recording will be paused if the user does not click the <i>Turn Off Privacy Shield</i> button earlier.
Percentage	Specify the percentage of the total number of current calls you want recorded for this queue.
Filter By	Select the sites, teams, and agents you want to include in your recording schedule. Note: Outdial call recording is based on the site, team, and agent who makes the outdial call. For example, if a recording schedule is created for the Outdial queue and a site named Chicago, then only those outdial calls made by teams under the Chicago site will be recorded, and not calls made from other sites.

Deleting a Recording Schedule

To delete a recording schedule:

1. Open the **Call Recording** module and in the list view, make a selection from the **Select Queue** drop-down list.

The recording schedules for the selected queue are displayed.

2. Click the  button to the left of a listed schedule and select **Delete** from the drop-down list.



Jukebox

The optional CC-One Jukebox module enables authorized users to search for and play audio files recorded through the CC-One Call Recording feature. In addition, authorized users can create tags that can be assigned to audio files for use as search criteria, specify which CAD variables to store with recordings, create custom attributes, and view recent Jukebox activity.

Note: The Jukebox module is available to authorized users of the CC-One Salesforce Edition through the **Voice Recording** tab.

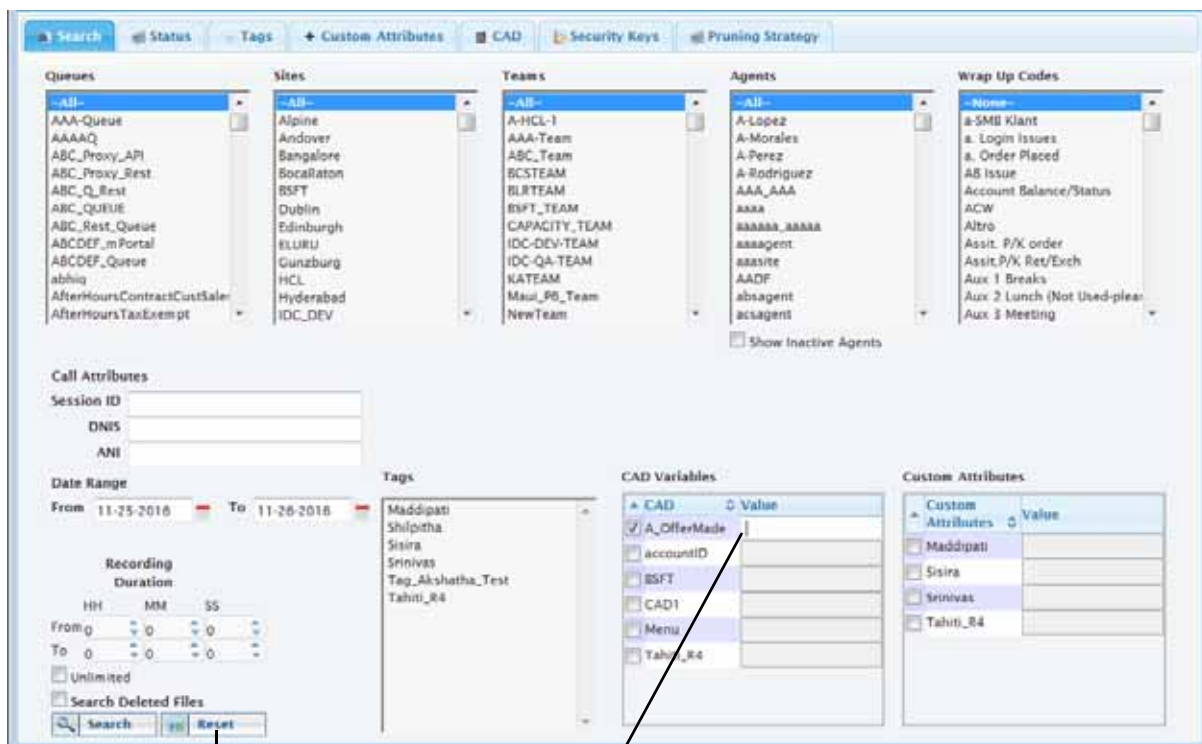
Topics covered in this chapter:

- [Searching for and Playing Recordings](#)
- [Assigning and Removing Tags](#)
- [Creating, Editing, and Exporting Tags](#)
- [Specifying Which CAD Variables to Store](#)
- [Creating and Modifying Custom Attributes](#)
- [Viewing Recent Jukebox Activity](#)
- [Viewing and Changing the Security Key Schedule](#)
- [Viewing the Pruning Strategy](#)

Searching for and Playing Recordings

To search for and play a recording:

1. Open the Jukebox module and in the **Search** tab, select one or more queues, sites, teams, and agents, or use the default **All** settings.
 - You can type a single character in one of the list boxes to display entities beginning with that character, or, in the Agents list, you can type multiple characters to display agent names beginning with that character sequence.
 - The Queues, Sites, and Teams lists are populated based on your access privileges.
 - After you select one or more sites, the teams and agents associated with the selected sites are displayed in the Teams and Agents lists.
 - If you select one or more teams, only the agents associated with those teams are displayed in the Agents list. If no teams are selected, then all agents associated with the selected sites are displayed.
 - If you want to include inactive agents in the search., click the **Show Inactive Agents** check box.
 - To filter the search based on wrap-up codes, select one or more codes from the **Wrapup Codes** list.



Click Reset to clear your selections.

After selecting a check box, you can enter text in the Value column.

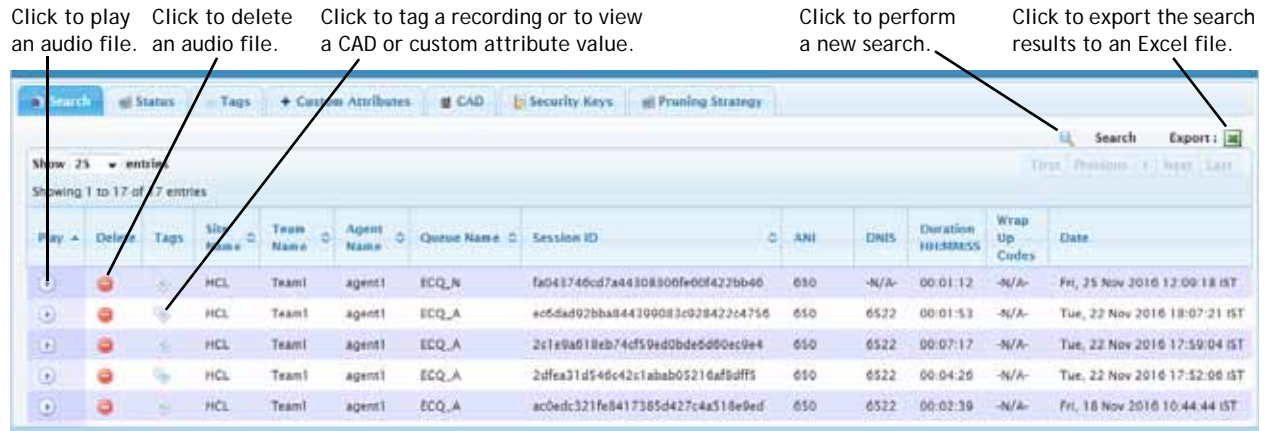
2. To filter the search based on session ID, DNIS (the number the caller dialed), or ANI number (either the caller's phone number or, in the case of an outdial call, the phone number of the agent who made the outdial call), enter a value in the **Session ID, DNIS, or ANI Number** fields.

Note that DNIS information is not available until 30 minutes after the call.

3. If tags (text strings that can be assigned to recordings) have been defined and assigned to recordings, you can filter the search based on tags by selecting them in the **Tags** list. For more information, see [“Assigning and Removing Tags” on page 281](#) and [“Creating, Editing, and Exporting Tags” on page 282](#).
4. If CAD variables are assigned in your Jukebox installation, you can filter the search based on call-associated data (CAD) values by selecting the check box to the left of one or more entries in the **CAD Variables** list and then entering a CAD value in the **Value** column for each selected variable.
5. If your Jukebox installation includes custom attributes, you can filter the search based on custom attribute values by selecting the check box to the left of one or more entries in the **Custom Attributes** list and then entering a custom attribute value in the adjacent **Value** column for each selected attribute.
6. Use the calendar controls in the **Date** fields to specify a data range.
7. Use the **Recording Duration** settings to specify the minimum and maximum length of recording to search for or leave the **Unlimited** check box selected to search for a recording of any length.
8. To search for audio files that were deleted less than 30 days ago, select the **Search Deleted Files** check box. Note the following:
 - Files that were manually deleted and files that have been deleted for 30 days or more are permanently removed from the system.
 - Deleted audio files cannot be played using the Jukebox.
9. To reset all lists and fields and start over again, click the **Reset** button at the bottom left-side of the tab.
10. Click the **Search** button to start the search.

If audio files meeting your search criteria are found, they are listed in the Jukebox window. Otherwise, the window displays a *0 records found* message.

If the search results occupy more than one page, buttons on the upper right side of the results page provide access to other pages.



To page through a results list that spans more than one page:

- Click the buttons on the upper right side of the results page.

To play a recording:

- Click the **Play** button to the left of an entry in the results list.

To permanently delete a recording:

- Click the **Delete** button to the left of an entry in the results list.

To assign a tag to a recording or remove a tag from a recording:

- Click the button to the left of an entry in the results list. For more information, see the next topic, [“Assigning and Removing Tags.”](#)

To view a CAD or custom attribute value:

- Click the button to the left of an entry in the results list to open a dialog box that displays the CAD or custom attribute values.

To sort the columns in the results table:

- Click the **Site**, **Team**, **Agent**, **Queue**, or **Session ID** column header to sort the search results based on the values in that column, and click it a second time to reverse the sort order.

When you select a column to sort by, an arrow appears next to the column header to indicate the direction of the sort order.

To perform a new search:

- Click **Search** on the upper-right side of the results page.


To export the search results to an Excel spreadsheet:

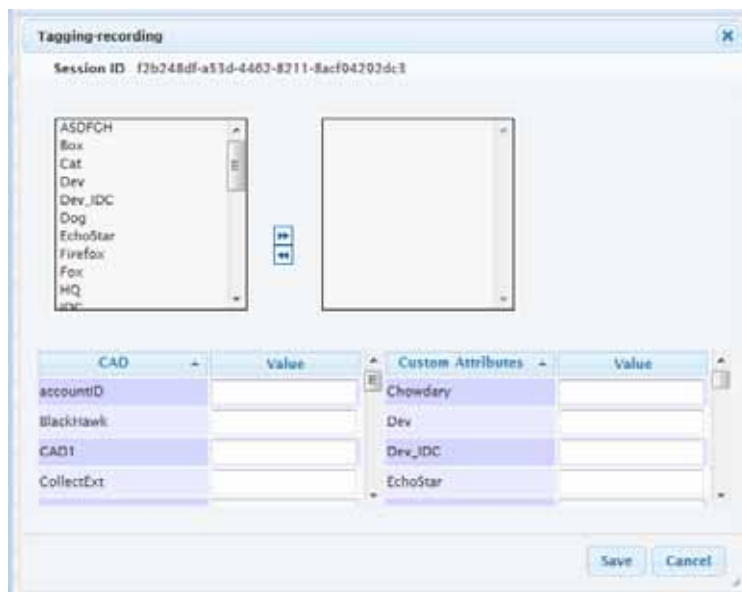
- Click the button on the upper-right side of the results page.

Assigning and Removing Tags

You can assign the same tag to multiple recordings and you can assign multiple tags to an individual recording.

To assign a tag to a recording or remove a tag from a recording:

1. Open the Jukebox module and in the **Search** tab, perform a search for the recordings you want to either assign tags to or remove tags from as described in “Searching for and Playing Recordings” on page 278).
2. Click the  button to the left of an entry in the results list.
3. On the upper part of the dialog box that opens, the list of tags assigned to the recording is displayed on the right and a list of tags that are available is displayed on the left.
4. To assign a tag to the recording, select a tag in list on the left and click the right arrow to move it to the list on the right.
5. To remove a tag from the recording, select a tag in the list on the right and click the left arrow to move it to the list on the left.

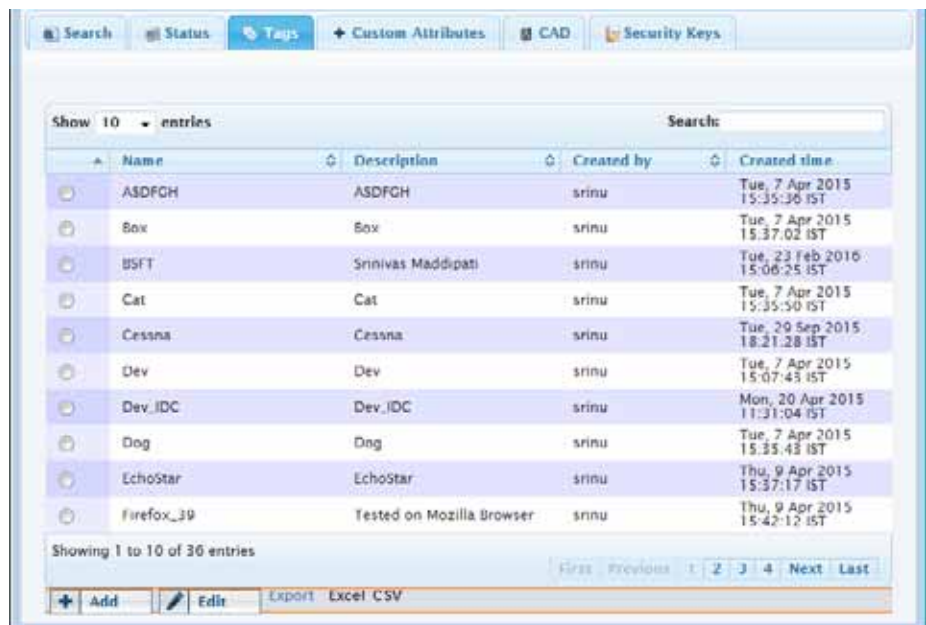


Creating, Editing, and Exporting Tags

The Tags tab in the Jukebox module enables authorized users to view, create, and edit tags that can be assigned to recordings (see [“Assigning and Removing Tags”](#) on page 281).

To create or edit a tag or export a list of tag data:

1. Open the Jukebox and in the **Tags** tab, do one of the following:
 - To create a new tag, click **Add**.
 - To edit the settings for a tag, select the button to the left of a tag name, and then click **Edit**.
 - To export the tag data displayed in the Tag tab, click the **Excel** or **CSV** link and in the dialog box that opens, click **Open** to open the file, or click **Save**, navigate to the directory where you want to save the file, and then click **Save**.



2. If you are adding or editing a tag, enter or change the tag name and optional description, and then click **Save**.



Specifying Which CAD Variables to Store

In the Jukebox, recordings can be searched based on call-associated data (CAD) values stored in CAD variables. The CAD tab enables authorized users to specify the CAD variables whose values will be stored with recordings.

To specify the CAD variables whose values will be stored with recordings:

- ▶ Open the Jukebox and in the CAD tab, select one or more variables from the **Available** list, click the arrow to move them to the **Assigned** list, and then click **Save**.

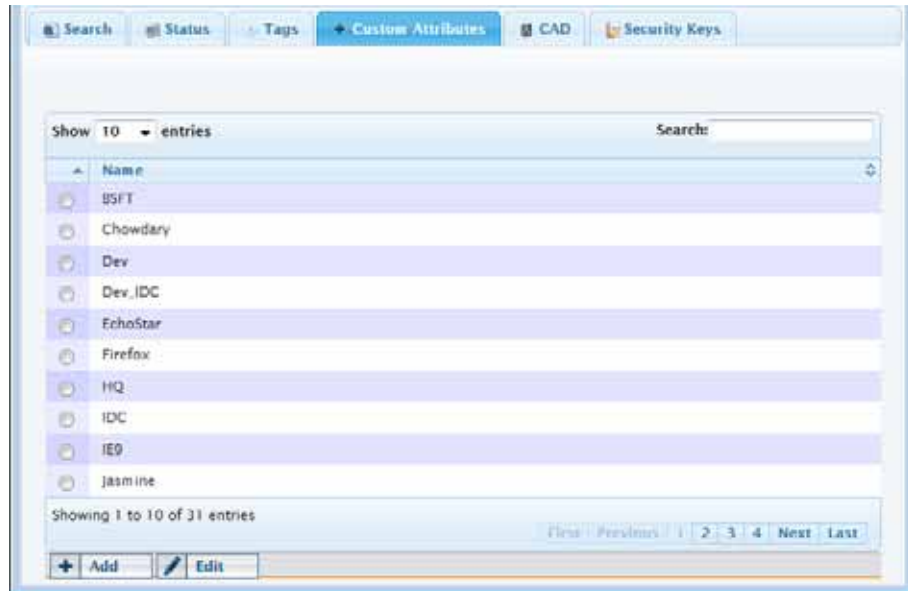


The variables in the Assigned list appear in the CAD Variables list on the Search tab, where they can be selected to filter a search.

Creating and Modifying Custom Attributes

Your CC-One representative can use the controls in the Custom Attributes tab to create and modify attributes whose values can be saved with recordings and later searched for.

Note: Search recordings by custom attributes functionality is yet to be implemented.



Viewing Recent Jukebox Activity

To view Jukebox activity:

- ▶ Open the Jukebox and click the **Status** tab.



Metric	Value
Last catalog database updated	Wed, 16 Mar 2016 13:13:42 IST
Number of unprocessed recording files	0
Number of recording files received in last 24 hours	0
Number of available columns for creating a Tag	3
Total duration of recordings received in last 24 hours	0
Average duration of recordings received in last 24 hours	0
Total size of recordings received in last 24 hours	0
Average size of recordings received in last 24 hours	0

The tab displays the following information:

- **Last catalogue database updated**
The date and time the system last processed recording files that were transferred to the Jukebox from the CC-One network.
- **Number of unprocessed recording files**
The number of recording files that have been transferred to the Jukebox from the CC-One network but that have not yet been processed. Processing involves the validation of the file name and file type, and populating the information fetched from the file name into the database.
- **Number of recording files received in the last 24 hours**
- **Number of available columns for creating a Tag**
The number of additional tags you can create.
- **Total duration of recordings received in the last 24 hours.**
- **Average duration of recordings received in the last 24 hours**
- **Total size of recordings received in the last 24 hours**
- **Average size of recordings received in the last 24 hours**

Viewing and Changing the Security Key Schedule

If your installation includes the encryption option, each recording file for your enterprise is encrypted using a public key that is randomly generated. When a user requests a recording file, the Recordings Server software decrypts the file using a randomly generated private key. A new set of public and private keys can be generated periodically based on settings specified in the Security Keys tab.

If your user role authorizes you to access the Security Keys tab, you can view and change the schedule for generating security key pairs.

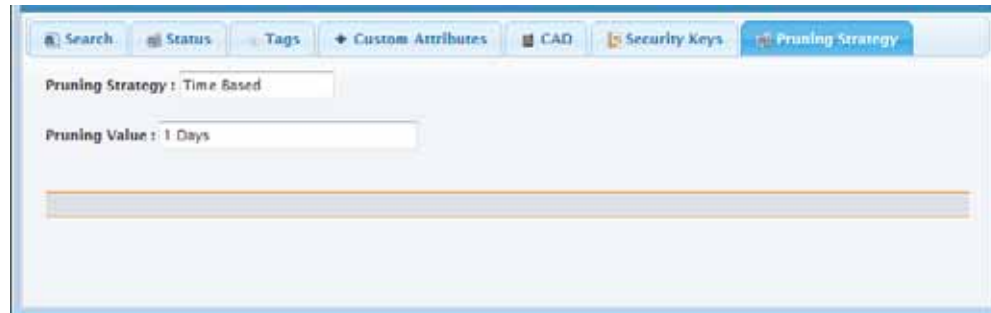


The settings in the Security Keys tab are described in the following table.

Setting	Description
Last Rotation Date	The date when a new security key pair was last generated. For a new installation, the value in this field is N/A (not available).
Next Rotation Date	The date when a new security key pair will be generated.
Enable Automatic Key Rotation	Select this check box if you want to specify a time interval for automatically generating a new security key pair, and then from the Rotate Keys Every drop-down list, select Day , Week , Month , Three Months , Six Months , or Year .
Rotate now	Select this button to generate a new key pair immediately.
Save	Click this button to save your settings.

Viewing the Pruning Strategy

If your user role authorizes you to access the Pruning Strategy tab, you can view the pruning strategy settings specified for your enterprise. Strategy settings are described in the following table.



Pruning Strategy	Pruning Value
No Pruning	0—No pruning occurs.
Time Based	The number of days to retain recordings. Recordings made prior to the specified number of days are deleted.
Agent Minutes	The maximum number of minutes of recordings per agent. When the maximum number of minutes is reached, the oldest recordings are deleted to make room for new recordings.
Storage Based	The limit on the total recording size in megabytes. When the limit is reached the oldest recordings beyond the specified storage value are deleted.

The Pruning Strategy settings are specified by authorized users on the Tenant page in the Provisioning module (see [“Tenant Settings”](#) on page 290).



Provisioning CC-One Resources

The Provisioning module enables authorized users to view, edit, delete, and create provisioned resources based on their user access privileges.

Note: If your enterprise subscribes only to CC-One Scorecard Routing, provisioned resources include only tenant settings, entry points, queues, sites, teams, business metrics, Management Portal users, and, optionally, call-associated data variables.

Topics covered in this chapter:

- [Tenant Settings](#)
- [Entry Points and Queues](#)
- [DN to Entry Point Mapping](#)
- [Multimedia Profiles](#)
- [Multimedia Extensions](#)
- [Sites](#)
- [Skill Definitions](#)
- [Skill Profiles](#)
- [Business Metrics](#)
- [Teams](#)
- [Threshold Rules](#)
- [Work Types](#)
- [Idle and Wrap-up Codes](#)
- [Address Books](#)
- [Outdial ANI](#)
- [Password Policy](#)
- [Agent Profiles](#)
- [Agent Accounts](#)
- [Call-Associated Data Variables](#)
- [CC-One Management Portal User Accounts](#)
- [Provisioned Items Reports](#)
- [Audit Trail](#)

Tenant Settings

To view the tenant settings provisioned for your enterprise:

- Click the **Provisioning** link on the CC-One Management Portal.

The Provisioning page appears, displaying the settings for your enterprise in the details panel on the right. Each setting is described in the following table.

An **Edit** button at the bottom of the details panel provides access to the Edit Tenant page where you can edit the *Email Address for Receiving Alerts* setting and authorized users can edit the *Recording Pruning Strategy*, and *Pruning Value* settings described in the following table.

Setting	Description
Tenant Name	The name of your enterprise.
Tenant Description	An optional description.
Time Zone	The time zone provisioned for your enterprise (see “About Time Zones” on page 19).
Email Address For Receiving Alerts	Specifies an email alias to which a notification will be sent whenever a change is made to the recording pruning strategy.
Short Call Threshold	The time interval, in seconds, that determines whether a call is considered short or abandoned.

Setting	Description
Sudden Disconnect Threshold	The time interval, in seconds, that determines whether a call is considered handled or was terminated so quickly as to possibly indicate an issue with connectivity or agent behavior. A call that is terminated after being distributed to a destination site, but within this time interval, is considered to be a <i>disconnected</i> call.
Inbound Maximum Active Calls	The maximum number of inbound calls that can be active. This includes all site, team, DN, queued, and in-process calls. A call that arrives after the maximum has been reached is busied out.
Outdial Maximum Active Calls	The maximum number of active outdial calls across the tenant.
Record All Calls	If True , all inbound and outdial calls will be recorded. If False , calls will be recorded based on settings for each queue.
Maximum Address Books	The maximum number of address books that can be defined for your enterprise (see “Address Books” on page 336).
Number of CAD Variables	The maximum number of non-deprecated call-associated data (CAD) variables that can be defined for your enterprise (see “Call-Associated Data Variables” on page 363).
SBR Enabled	If True , the Skills-Based Routing (SBR) feature is enabled for your enterprise.
Maximum Skills	The maximum number of skills that can be defined for your enterprise.
Maximum Text Skills	The maximum number of text skills that can be defined for your enterprise.
Threshold Alerts Enabled	If True , the Threshold Alerts feature is enabled for your enterprise (see “Threshold Rules” on page 326).
Maximum Threshold Rules	The maximum number of active threshold rules that can be defined for your enterprise.
Multimedia Enabled	If True , the Multimedia feature is enabled for your enterprise (see “About Multimedia” on page 59).
Maximum Channels Per Profile	The maximum number of channels that can be specified for a multimedia profile. Visible only if Multimedia is enabled (see “Multimedia Profiles” on page 307).
Check Agent Availability	If True , teams with no logged in agents can be excluded for consideration as the routing strategy escalates over time. If False , the <i>Check Agent Availability</i> setting can be enabled for individual inbound queues (see “Adding an Entry Point or Queue” on page 295).
Permit Alert	If True , the Supervisory Alert feature is enabled for your enterprise (see “Responding to Supervisory Alerts from Agents” on page 32).
Maximum Dashboard Users	The maximum number of Management Portal users that can be defined for your enterprise.

Setting	Description
Maximum Entry Points and Queues	The maximum number of entry points and queues that can be defined for your enterprise.
Pause/Resume Enabled	<p>If True, agents can click the Privacy Shield button during a call to pause and resume potential call recording. For example, the agent might need to pause potential call recording while obtaining a credit card number or other protected information.</p> <p>If False, this feature can be enabled for individual queues (see “Adding an Entry Point or Queue” on page 295).</p> <p>Note: The Privacy Shield button is displayed on the Agent Desktop only if the Privacy Shield feature is enabled in your CC-One service configuration.</p>
Recording Pause Duration	If <i>Pause/Resume Enabled</i> is set to <i>True</i> , this field specifies how many seconds call recording will be paused if the agent does not click the <i>Turn Off Privacy Shield</i> button earlier.
Allow Agent Password Reset	If True , agents who forget their Agent Desktop passwords can access a dialog box where they can enter their user name, email address, and company name for validation against data in the provisioning database. If the data is validated, a new password will be generated and sent to the email address.
Multiple Time Zone Enabled	If True , entry points and queues can be associated with time zones. Time values in routing strategies will be based on the time zone provisioned for the entry point or queue or, if no time zone is specified, the time zone provisioned for your enterprise.
SCR Enabled	If True , the CC-One Scorecard Routing is being implemented for your enterprise (see “About CC-One Scorecard Routing” on page 53).
Allow Agent Thresholds	If <i>Threshold Alerts Enabled</i> is set to <i>True</i> , this field specifies whether or not the Agent Threshold Alerts feature is enabled for your enterprise.
Voice Callback Enabled	<p>If True, the <i>Callback</i> call control block is available for use in call control scripts (see “Callback Block” on page 72).</p> <p>A <i>True</i> setting here automatically sets <i>Web Callback Enabled</i> to <i>True</i>.</p>
Web Callback Enabled	<p>If True, the Web Callback feature is enabled for your enterprise (see “About Web Callback” on page 60).</p> <p>Note: If <i>Voice Callback Enabled</i> is set to <i>True</i>, then Web Callback Enabled is automatically set to <i>True</i> and cannot be changed to <i>False</i>.</p>
Maximum Callback Attempts	If <i>Web Callback Enabled</i> is set to <i>True</i> , this field specifies the number of times the system will attempt a requested callback if the initial callback attempt fails.
Retry Callback Interval	If <i>Web Callback Enabled</i> is set to <i>True</i> , this field specifies the number of seconds between callback attempts in the event the initial callback attempt fails.

Setting	Description
Recording Pruning Strategy	If the Jukebox module is enabled for your enterprise, specifies the recording pruning strategy for the enterprise: <i>No Pruning</i> , <i>Time Based</i> , <i>Agent Minutes</i> , or <i>Storage Based</i> .
Pruning Value	Specifies the value for the selected recording pruning strategy as either 0 for <i>No Pruning</i> or one of the following values: <ul style="list-style-type: none"> For the <i>Time Based</i> strategy, the number of days to retain recordings. Recordings made prior to the specified number of days are removed. For the <i>Agent Minutes</i> strategy, the maximum number of minutes of recordings per agent. When the maximum number of minutes is reached, the oldest recordings are removed to make room for new recordings. For the <i>Storage Based</i> strategy, the limit on the total recording size in megabytes. When the limit is reached the oldest recordings beyond the specified storage value are removed.
Allow User Password Reset	If True , Management Portal users who forget their CC-One Management Portal passwords can access a dialog box where they can enter their user name, email address, and enterprise name for validation against the provisioning database. If the data is validated, a new password will be sent to the email address.
Multimedia Extensions Enabled	If True , Multimedia Extensions are enabled for your enterprise (see “About Multimedia” on page 59 and “Multimedia Extensions” on page 310).

Entry Points and Queues

Entry points and queues are types of *virtual teams*. A virtual team can be thought of as a “holding place” for incoming customer calls.

- An entry point is the initial landing place for customer calls on the CC-One system. One or more toll-free or dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point.







The entry points that are used in the CC-One Scorecard Routing environment are referred to as *cross-ACD entry points*. Calls that arrive at a cross-ACD entry point can be routed to queues on external ACDs.

- A queue is where calls are kept while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

An inbound queue that represents a third-party ACD is known as a *proxy queue*. Calls that are sent to an external ACD are distributed to agents by the external ACD. Proxy queues are used by CC-One to track the call activity occurring on the external ACD queues. There are two types of proxy queues: dedicated and shared. Agents signed in to a dedicated proxy queue serve only the CC-One customer; agents signed in to a shared queue serve multiple customers.

Two additional virtual team types are provisioned for tenants of the standard CC-One service that use the outdial feature: outdial entry point and outdial queue.

Each entry point and queue type is represented by a unique icon:

- | | |
|---|---|
|  entry point |  queue |
|  cross-ACD entry point |  proxy queue |
|  outdial entry point |  outdial queue |

Topics covered in this section:

- [Adding an Entry Point or Queue](#)
- [Copying an Entry Point or Queue](#)
- [Viewing and Editing Entry Points and Queues](#)

Adding an Entry Point or Queue

If authorized by your user role, you can add an entry point or queue. After you add a queue, it can be used immediately. However, newly added entry points require additional provisioning steps before they can be used:

- An inbound entry point becomes usable only after dial numbers have been mapped to it as described in [“DN to Entry Point Mapping” on page 304](#).
- An outdial entry point cannot be used until additional provisioning steps are performed by BroadSoft Operations.

To add an entry point or queue:

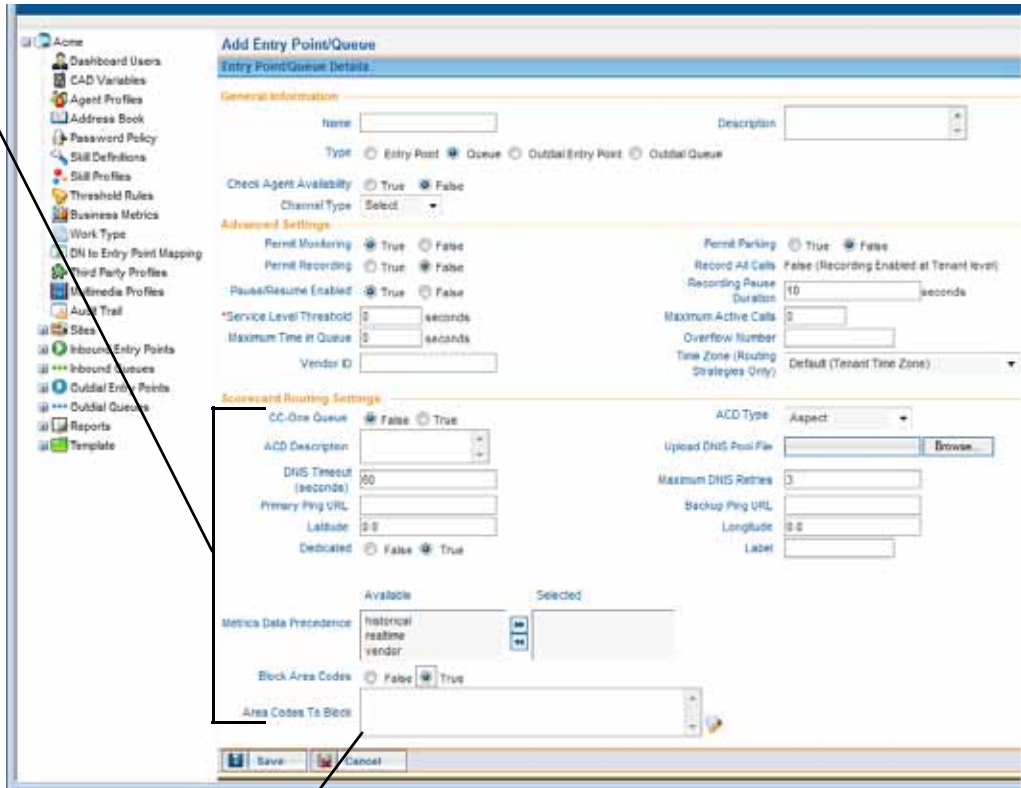
1. Click the **Provisioning** link on the CC-One Management Portal or, if the Provisioning module is already open, click the link in the left panel that represents your enterprise to display the View Tenant page.
2. Click the **Add Entry Point/Queue** button beneath the page title bar.



The Add Entry Point/Queue page is displayed in the right panel.

3. Specify settings for the entry point or queue as described in the following table, and then click **Save**.


These queue settings are visible only if your enterprise subscribes to Scorecard Routing and the CC-One Queue setting is *False*.





This setting is visible only when *Block Area Codes* is *True*.

Setting	Description
General Information	
Name	Enter a name for the entry point or queue.
Description	Optionally, enter a short description of the entry point or queue function.
Type	Select a button to specify whether this is an entry point, queue, outdial entry point, or outdial queue.
Deleted	This read-only field is displayed only on the View Entry Point or View Queue page. It is set to False by default. If the entry point or queue is deleted, the system automatically resets this field to True .
Check Agent Availability	Visible only if this is an inbound queue. Select True or False to specify whether or not teams with no logged in agents can be excluded for consideration as the routing strategy escalates over time. If the <i>Check Agent Availability</i> field in the Tenant settings is set to True, a False setting here is ignored (see “Tenant Settings” on page 290).

Setting	Description
Channel Type	Select the channel type: Telephony , Email , or Chat . Other channel types (Fax, Video, and Others) are reserved for future use. For outdial entry points and queues, this is a read-only field displaying “Telephony” as the channel type.
Advanced Settings	
Permit Monitoring	Select True or False to specify whether or not calls on this queue can be monitored.
Permit Parking	Select True or False to specify whether or not calls can be queued.
Permit Recording	Select True or False to specify whether or not calls can be recorded. If the <i>Record All Calls</i> field in the Tenant settings is set to True , a False setting here is ignored (see “Tenant Settings” on page 290).
Record All Calls	This setting is enabled only if <i>Permit Recording</i> is set to True . Specify True or False to indicate whether or not all calls for this queue will be recorded. If the <i>Record All Calls</i> field in the Tenant settings is set to True , this setting is not available (see “Tenant Settings” on page 290).
Pause/Resume Enabled	Select True or False to specify whether or not agents can click the Privacy Shield button during a call to pause and resume potential call recording. For example, the agent might need to pause call recording while obtaining a credit card number or other protected information. If the <i>Pause/Resume Enabled</i> field in the Tenant settings is set to True , a False setting here is ignored (see “Tenant Settings” on page 290). Note: The Privacy Shield button is displayed on the Agent Desktop only if the Privacy Shield feature is enabled in your CC-One service configuration.
Recording Pause Duration	If <i>Pause/Resume Enabled</i> is set to True , this field specifies how many seconds call recording will be paused if the agent does not click the <i>Turn Off Privacy Shield</i> button earlier.
Service Level Threshold	Specify the maximum length of time, in seconds, that a customer call can be in queue before being flagged as outside service level. If a call is completed within this time interval, it is considered to have been handled within service level.
Maximum Active Calls	Specify the maximum number of simultaneous calls allowed for this entry point or queue. Additional calls terminating on the number associated with this queue will be blocked (that is, a busy signal will be played).

Setting	Description
Maximum Time in Queue	Specify the length of time, in seconds, after which a queued call will be distributed to the overflow number provisioned for this queue. The value entered here is the default value that appears in the <i>Maximum Time in Queue</i> field in a routing strategy for this queue. If a different value is entered in the routing strategy, that value will be used instead of this one. For an email queue, specify a very high value to avoid overflow.
Overflow Number	Enter the destination number to which calls are distributed when they exceed the <i>Maximum Time in Queue</i> setting specified in the routing strategy for this queue. Valid entry is 11 digits—for example, 14155551234.
Vendor ID	If this is a proxy queue, or if this is an entry point or queue used for a media type other than telephony, enter the unique alphanumeric string that maps this queue to the vendor.
Time Zone	If the Multiple Time Zone feature is enabled for your enterprise, optionally specify the time zone of the entry point or queue. Time values in routing strategies are based on the time zone provisioned for the entry point or queue or, if no time zone is specified, the time zone provisioned for your enterprise (typically headquarters).
DN List	
IVR DN List	Visible only if this is an entry point. If this entry point will be integrated with an external IVR, enter the DN pool list numbers.
DN	This setting is displayed only when you view or edit an inbound entry point. <ul style="list-style-type: none"> If no DNs are mapped, <i>Not Mapped</i> is displayed. To add mapping, see “DN to Entry Point Mapping” on page 304. If DNs have been mapped to the entry point, you can click the  icon to display a list of the mapped DNs.
Scorecard Routing Settings	
CC-One Queues Only	Visible only if this is an inbound entry point. <ul style="list-style-type: none"> If True, call that arrive at this entry point will be routed only to CC-One queues. If False, calls will be routed to proxy queues that represent third-party ACDs and may also be routed to CC-One queues.
CC-One Queue	Visible only if this is an inbound queue. Select False if this is a proxy queue.
ACD Type	Visible only if this is a proxy queue. Select the type of ACD system from the drop-down list.

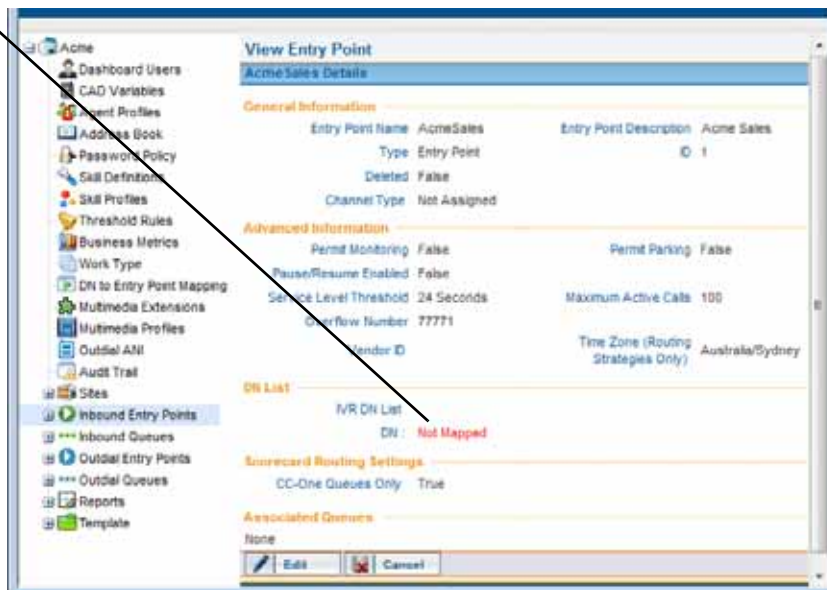
Setting	Description
ACD Description	Visible only if this is a proxy queue. Optionally enter a description of the ACD.
Upload DNIS Pool File	<p>Visible only if this is a proxy queue, this field lets you upload the .csv file containing the DNIS pool used to negotiate call delivery to the third-party ACD. To do so:</p> <ol style="list-style-type: none"> 1. Create a .csv file consisting of new-line separated entries. Each line can have either a DNIS number or a range. The separator for a range is ... (three dots). 2. Save the file to your system. 3. Specify the path to the .csv file in this field, or click the Browse button, then navigate to the file and select it. <p>When viewing or editing the queue (as described in “Viewing and Editing Entry Points and Queues” on page 302), you can click the  icon to display a list of DN entries for this queue in a separate window.</p> <p>When you view the queue, this setting is labeled DNIS Pool Data.</p>
DNIS Timeout (seconds)	Visible only if this is a proxy queue. If, after the time interval specified here, a Connect message has not been received from the third-party ACD, it will be assumed that the call did not get connected and the DNIS will be released so that it can be reused. Minimum value is 15 seconds.
Maximum DNIS Retries	Visible only if this is a proxy queue. Enter the maximum number of times the system should attempt to route a call to this queue before the call is rerouted to the entry point.
Primary Ping URL	Visible only if this is a proxy queue. Enter the URL provided by the third-party outsourcer to determine the accuracy of the data from the proxy queue.
Backup Ping URL	This setting is reserved for future use.
Latitude Longitude	These settings are reserved for future use.
Dedicated	<p>Visible only if this is a proxy queue.</p> <ul style="list-style-type: none"> • If True, agents signed in to this queue are serving only the CC-One customer. • If False, agents signed in to this queue are serving more than one customer.
Label	This setting is reserved for future use.

Setting	Description
Metrics Data Precedence	Visible only if this is a proxy queue. Move all the listed data sources from the Available list to the Selected list in the order in which you want the system to look for metrics data to use in the routing decision. All three data sources must be moved to the Selected list. <ul style="list-style-type: none"> • Vendor. Metrics periodically posted by the vendor. • Realtime. Real-time metrics computed and tracked by the CC-One service. • Historical. The CC-One service periodically loads six-week rolling historical data from the call data processor database. This data is computed and stored by each minute.
Block Area Codes	Visible only if this is a proxy queue. Select True or False to specify whether or not to block the routing of calls to this queue from a set of specified area codes. If you selected True , click the  icon and then, in the Area Code Details dialog box, specify the area codes to block (see “Specifying Area Codes to Block” on page 315).
Associated Queues	
Visible only when you view or edit an entry point, this read-only section displays the names of all queues that are associated with the entry point in a routing strategy.	

4. A new inbound entry point cannot be used until DNs have been mapped to it as described in [“DN to Entry Point Mapping”](#) on page 304.

A new outdial entry point requires intervention by BroadSoft Operations to complete additional provisioning steps.

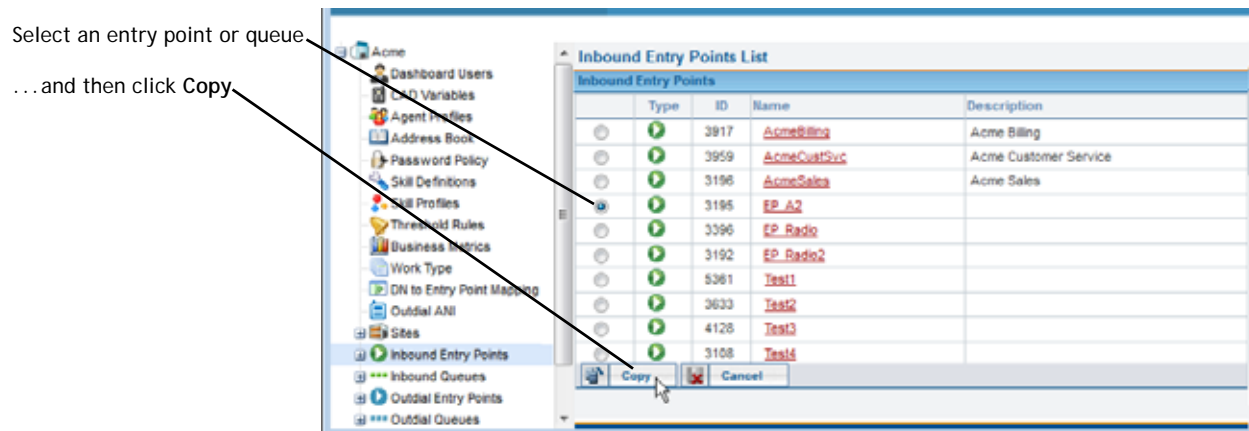
This field displays *Not Mapped* until DNs are mapped to the new entry point.



Copying an Entry Point or Queue

To copy an entry point or queue:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click one of the following links: **Inbound Entry Points**, **Inbound Queues**, **Outdial Entry Points**, or **Outdial Queues**.
3. On the list page that appears in the right panel, select the button to the left of the entry point or queue name you want to copy, and then click **Copy**.



4. On the page that appears in the right panel, edit the settings as appropriate, and then click **Save**. For a description of each setting, see the settings table beginning on [page 296](#).
5. A new inbound entry point cannot be used until DN's have been mapped to it as described in “[DN to Entry Point Mapping](#)” on [page 304](#).

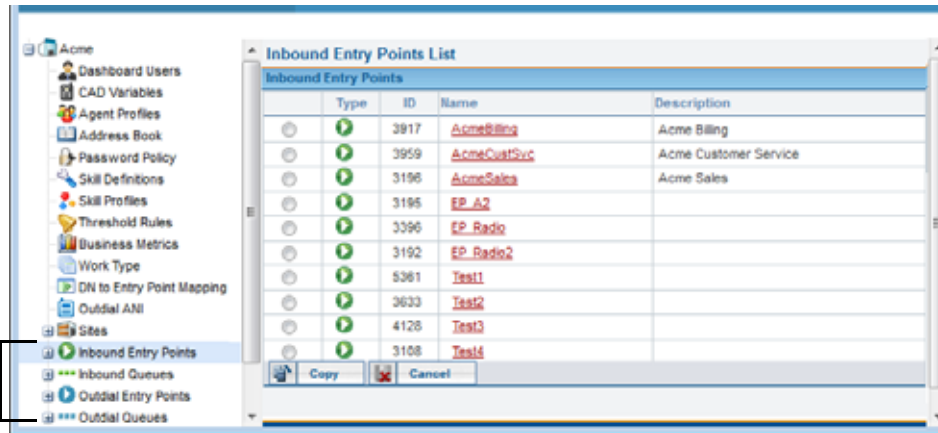
A new outdial entry point requires intervention by BroadSoft Operations to complete additional provisioning steps.

Viewing and Editing Entry Points and Queues

To view or edit an entry point or queue:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click one of the following links or click the plus sign (+) next to the link: **Inbound Entry Points**, **Inbound Queues**, **Outdial Entry Points**, or **Outdial Queues**.

Click one of these links or click a plus sign (+), and then click the name of an entry point or queue.

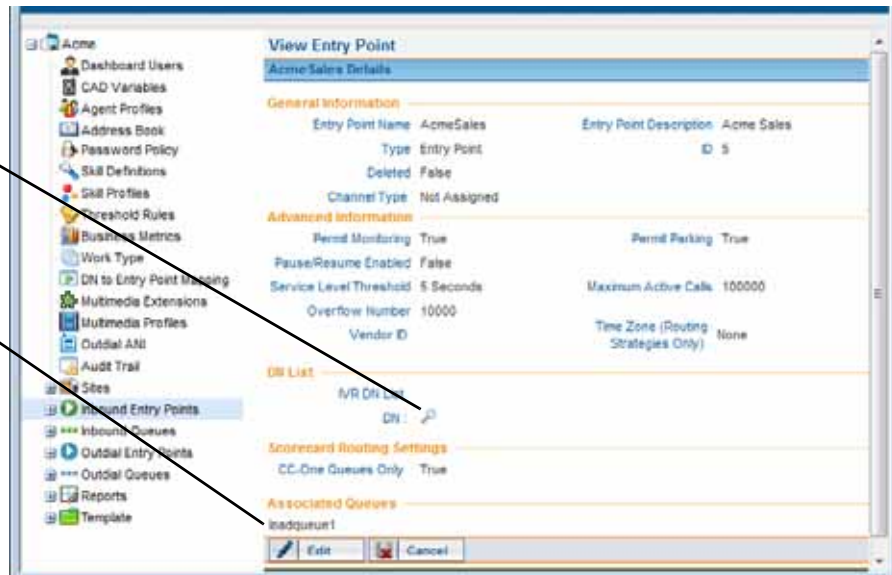


3. Click the name of the entry point or queue you are interested in.

The settings for the selected entry point or queue are displayed in the details panel on the right side of the page.

When you view an entry point to which DNs have been mapped, you can click this icon to view the list of mapped DNs in a pop-up window.

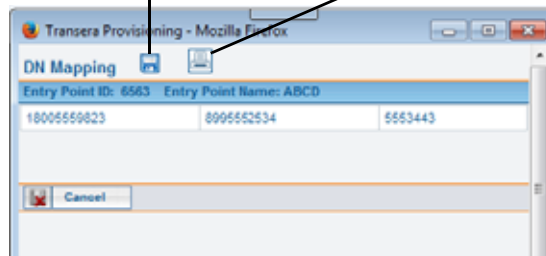
This section displays the names of all queues that are associated with the entry point in a routing strategy.





4. If DN's have been mapped to the entry point, you can click the  icon in the **DN** field to open a pop-up window displaying the list of mapped DN's.

Click one of the icons at the top of the pop-up window to print the list or export the data to a .csv file.

Click to export the data to Microsoft Excel or save as a .csv file. Click to print the list.

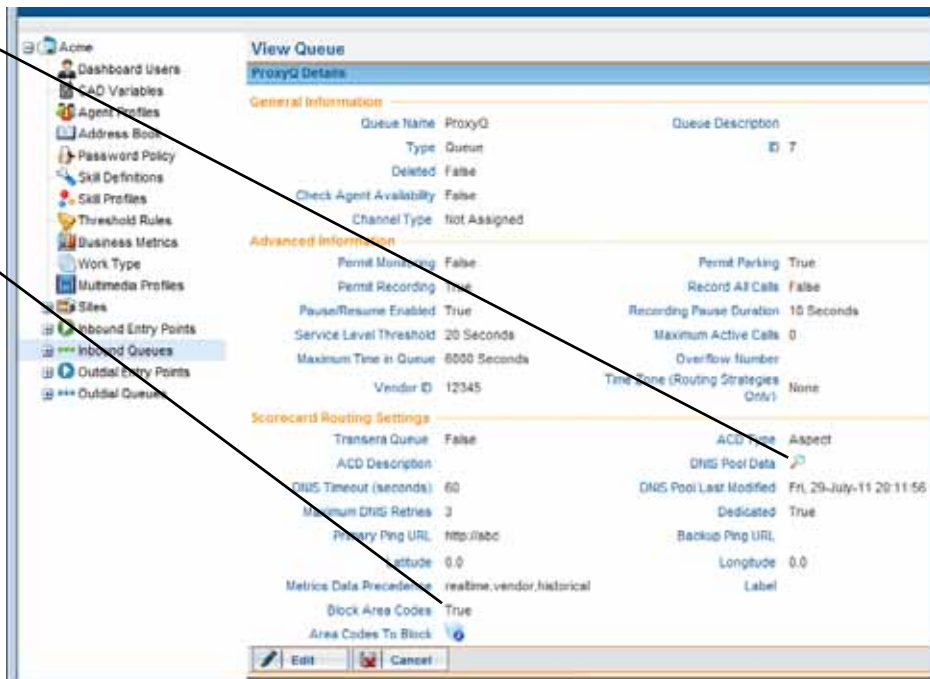


5. If you are viewing a proxy queue, you can do the following:

- Click the  icon in the **DNIS Pool Data** field to open a pop-up window displaying the list of DNIS entries for the queue. You can click an icon at the top of the pop-up window to export the data to a .csv file.
- If the *Blocked Area Codes* field is set to *True*, you can click the  icon in the **Area Codes to Block** field to open a pop-up window displaying the list blocked area codes.


When you view a proxy queue, you can click this icon to display the list of DNIS entries in a pop-up window.

Click this icon to display the list of blocked area codes for this proxy queue.

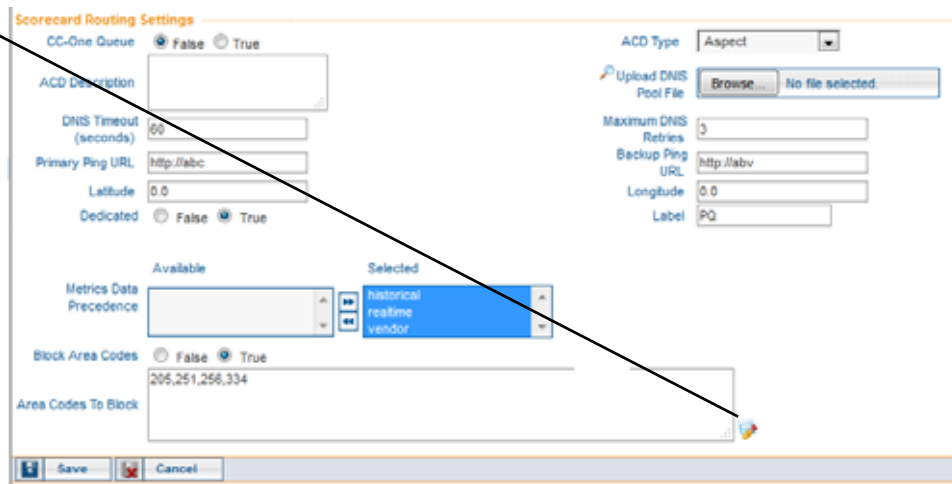


6. To edit the settings for the entry point or queue, click the **Edit** button at the bottom of the View page to display the Edit page, make the changes you want, and then click **Save**.

For a description of each setting, see the settings table beginning on [page 296](#).

If you are editing a proxy queue configured to use the blocked area codes feature, you can click the  icon to edit the list of blocked area codes (see “[Specifying Area Codes to Block](#)” on [page 315](#) for more information).

Click this icon to open a pop-up window where you can edit the list of blocked area codes.



DN to Entry Point Mapping

Each DN (ingress toll-free or DID number) that arrives at an entry point in the CC-One system must be mapped to the entry point before the entry point can be used.

The DN Mappings page provides an interface for adding, editing, and viewing the mappings between DNs and entry points as described in the following topics:

- [Adding, Editing, and Deleting DN Mappings Individually](#)
- [Using Bulk Upload to Add or Remove DN Mappings](#)

Adding, Editing, and Deleting DN Mappings Individually

Note: Changes take effect after the system has automatically synchronized the associated files, which occurs at hourly intervals.

To add, edit, or delete DN mappings individually:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **DN to Entry Point Mapping** link.

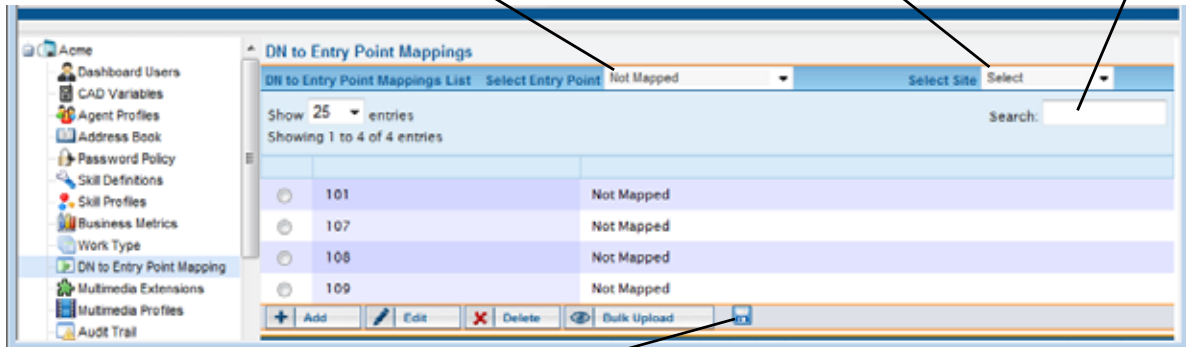
The DN to Entry Point Mappings page appears in the right panel, displaying a list of any DNs that are not currently mapped to an entry point.

- To display existing mappings, either select an entry point from the **Select Entry Point** drop-down list or, if Site Level TFN is enabled for your enterprise, select a site from the **Select Site** drop-down list.
- To filter the list of DNs, enter one or more characters in the **Search** field.

Select an entry point from this drop-down list...

...or, if site level TFN is enabled, you can select a site from this list.

To filter the list, enter one or more characters here.



Click to export the data as a .csv file.

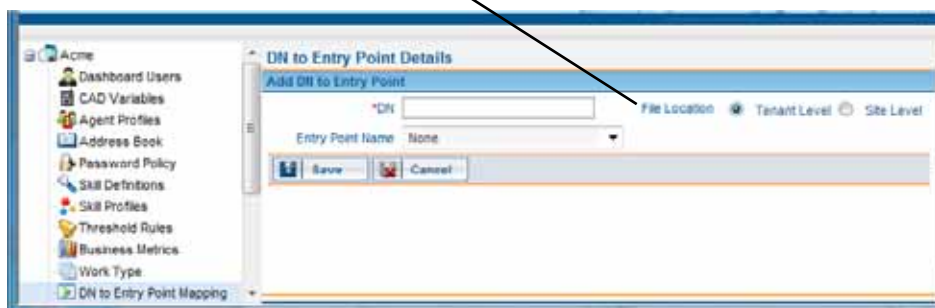
- To remove a mapping, select the button to the left of a listed DN, and then click **Delete**.
- To add a new mapping, click **Add**.

- OR -


To edit a mapping, select the button to the left of a listed DN, and then click **Edit**.

- If you are adding or editing a mapping, specify or change the settings on the page that appears in the right panel, and then click **Save**. Settings are described in the following table.

This field is displayed only if site level TFN is enabled for your enterprise.



Setting	Description
DN	Enter the ingress toll-free or DID number. The format must match whatever will be received from the inbound carrier, which is typically numbers only—no spaces or other characters.
File Location	If Site Level TFN is enabled for your enterprise: <ul style="list-style-type: none"> Select a button to specify whether you want the mapping file to be located at the Tenant Level or Site Level. If you selected <i>Site Level</i>, select a site from the Site Name drop-down list.
Entry Point Name	Select the entry point to which you want to map the DN. If the entry point has not yet been created, select None . Then you can map the DN to an entry point later.

- To export the DNs and their related entry points as a .csv file, click the **Export**  button. In the dialog box that opens, either click **Open** to open the file, or click **Save**, navigate to the directory where you want to save the file, and then click **Save**.

Using Bulk Upload to Add or Remove DN Mappings

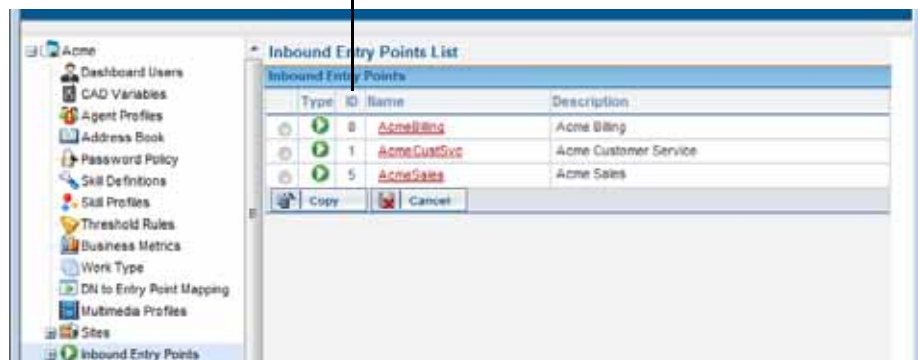
The Bulk Upload page provides an interface for adding or removing multiple DN mappings as described in the following procedure:

- Create a .csv file consisting of new-line separated entries. Each line must include a comma-separated DN number, entry point ID pair. For example:

```
8005551234,47
8005552345,47
8005552365,73
```

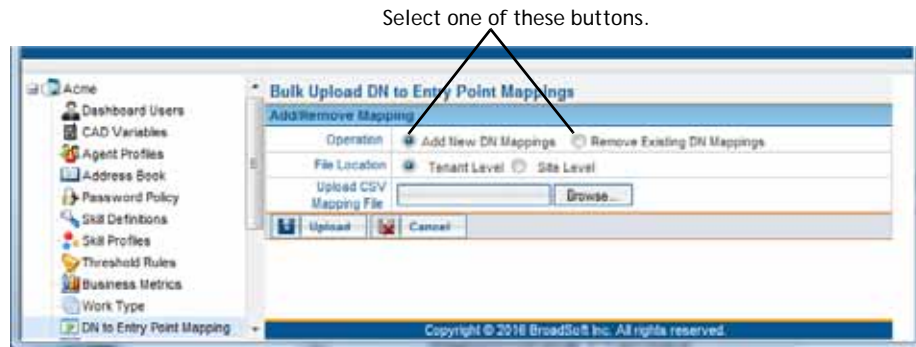
To find the ID of an entry point, display the Inbound Entry Point list as follows: click the **Provisioning** link on the CC-One Management Portal and in the selection panel on the left side of the page, click the **Inbound Entry Points** link.

Entry point IDs are displayed in this column.



- Save the .csv file to your system.

3. In the Provisioning module, click the **DN to Entry Point Mapping** link in the selection panel, and on the page that appears in the right panel, click the **Bulk Upload** button.
4. On the Bulk Upload DN to Entry Point Mappings page, select one of the buttons in the **Operation** field to specify whether you want to add new DN mappings or remove existing mappings.



5. If Site Level TFN is enabled for your enterprise:
 - Select a button in the **File Location** field to specify the location of the mapping files: **Tenant Level** or **Site Level**.
 - If you selected *Site Level*, select a site from the **Site Name** drop-down list.
6. In the **Upload CSV Mapping File** field, click the **Browse** button, then navigate to the .csv file and select it.
7. Click **Upload**.

Multimedia Profiles

The optional Multimedia feature enables the CC-One system to route email, fax, and chat contacts.

If Multimedia is enabled for your enterprise, each agent is associated with a multimedia profile, which specifies how many of each media type the agent can handle concurrently.

Multimedia profiles can be assigned to sites, teams, and individual agents. By default, the *Default_Telephony_Profile* is assigned to every site. This profile cannot be edited or deleted, but you can assign a different profile to a site.

Each agent-based team at a given site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team's profile unless the agent is assigned a different multimedia profile.

To view, add, edit, or delete multimedia profile:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Multimedia Profiles** link.

The Multimedia Profile Details page is displayed in the right panel. Note that the *Default_Telephony_Profile* cannot be edited or deleted.



3. To delete a profile, select the button to the left of the profile name and then click **Delete**. You cannot delete a profile that is assigned to a site, team, or agent.
4. To add or edit a profile, do one of the following:
 - To add a profile, click **Add**.
 - To edit a profile, select the button to the left of the profile name and then click **Edit**.
5. On the page that appears in the right panel, specify or change the settings for the profile as described in the following table, and then click **Save**.



Setting	Description
Profile Name	Enter a name for the multimedia profile.
Profile Description	Optionally, enter a description of the profile.
Active	Select True or False to specify whether or not the profile is active.
Blending Mode	Specify a blending mode: <ul style="list-style-type: none"> • Open. Different multimedia contacts will be routed to the agent without any restrictions. • Realtime. Only a single realtime contact will be routed to the agent at a time. For example, the agent will not receive a chat contact while handling a voice contact and vice versa.
Number of Channels	For each media type, specify the number of concurrent contacts of that type an agent can handle or specify 0 if no contacts of that type can be sent to the agent. For Telephony, you can specify only 0 or 1 . The maximum number of media channels is determined by the <i>Maximum Channels Per Profile</i> provisioned in the tenant settings for your enterprise (see “ Tenant Settings ” on page 290).

Multimedia Extensions

If your enterprise uses the Multimedia feature and Multimedia Extensions are enabled for your enterprise, agents can be associated with a multimedia extension, which identifies the enabling module for each media type the agent can handle.

Multimedia extensions can be assigned to sites and individual agents. Each agent at a given site is associated with the multimedia extension assigned to that site unless the agent is assigned a different multimedia extension.

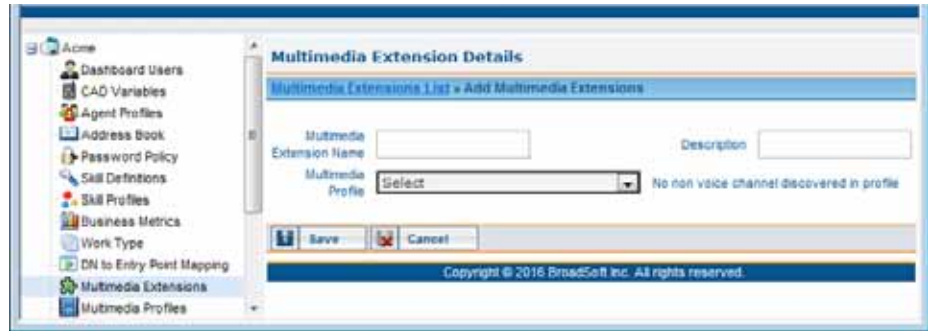
To view, add, edit, or delete a multimedia extension:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Multimedia Extensions** link.

The Multimedia Extensions List page is displayed in the right panel.



3. To delete a multimedia extension, select the button to the left of the multimedia extension name and then click **Delete**. You cannot delete a multimedia extension that is assigned to a site or agent.
4. To add or edit a multimedia extension, do one of the following:
 - To add a multimedia extension, click **Add**.
 - To edit a multimedia extension, select the button to the left of the name and then click **Edit**.
5. On the page that appears in the right panel, specify or change the settings as described in the following table and then click **Save**.



Setting	Description
Multimedia Extension Name	Enter a name for the multimedia extension.
Description	Optionally, enter a description of the multimedia extension.
Multimedia Profile	From the drop-down list, select a multimedia profile that does not include telephony. After you select a multimedia profile, a new setting appears for each channel type included in the profile.
Multimedia Enabler	Select a multimedia enabler from the drop-down list for each channel type included in the selected multimedia profile.

Sites

A site is a physical call center location under the control of your enterprise. For example, an enterprise named *Acme* might have sites in Chicago, Manila, and Bangalore with agents to handle calls.

Topics covered in this section:

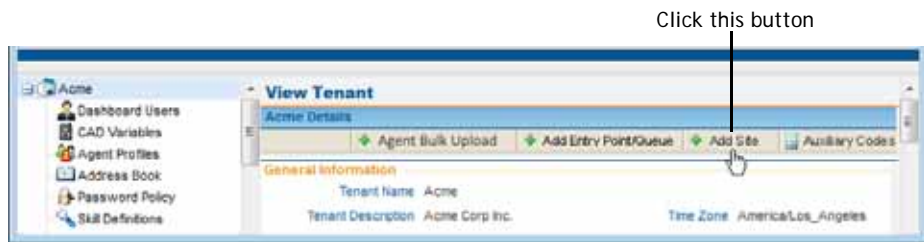
- [Adding a Site](#)
- [Viewing, Editing, or Deleting a Site](#)
- [Specifying Area Codes to Block](#)

Adding a Site

Note: When you add a site, the system automatically adds a team to the new site. You can change the team name and other settings if you want to use this team, but you cannot change the team type from Capacity Based to Agent Based. Do not delete the team without first adding a different team for the new site.

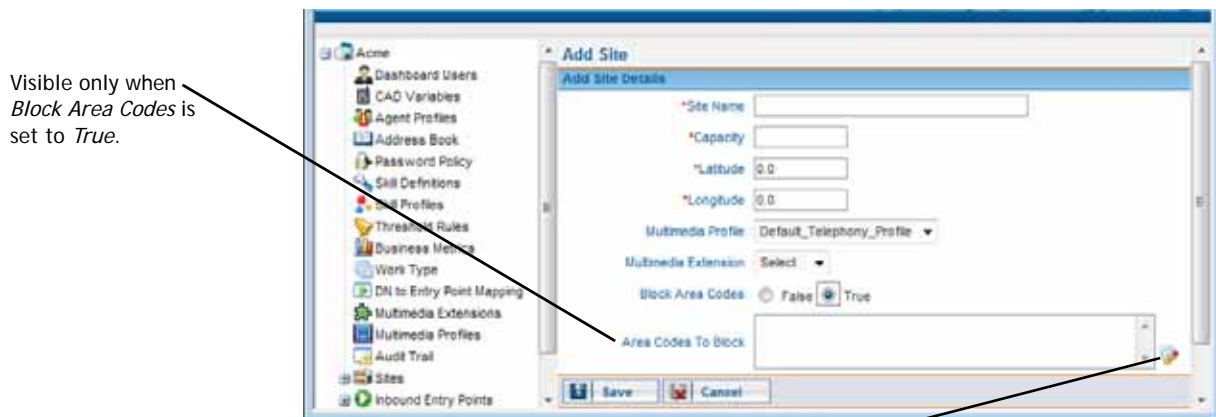
To add a site:

1. Click the **Provisioning** link on the CC-One Management Portal or, if the Provisioning module is already open, click the link in the left panel that represents your enterprise to display the View Tenant page.
2. Click the **Add Site** button beneath the page title bar.




The Add Site page appears in the right panel.

3. Specify settings for the site as described in the following table, and then click **Save** to add the site.



Click this icon to open a dialog box where you can select the area codes to block.

Setting	Description
Site Name *	Enter the name of the site (for example, <i>Chicago</i>).
Capacity *	Reserved for future use. Note, however, that you must enter a value (for example, 20) in this field.

Setting	Description
Latitude * Longitude *	Reserved for future use.
Multimedia Profile	If Multimedia is enabled for your enterprise, optionally select a multimedia profile for this site or leave the default setting, <i>Default_Telephony_Profile</i> (see “Multimedia Profiles” on page 307 for more information).
Multimedia Extension	If Multimedia Extensions are enabled for your enterprise, optionally select a multimedia extension for this site. The list of multimedia extensions is populated based on the multimedia profile assigned to the site. (See “Multimedia Extensions” on page 310 for more information.)
Block Area Codes	Select True or False to specify whether or not to block the routing of calls to this site from a set of specified area codes. If you selected True , click the  icon and then, in the Area Code Details dialog box, specify the area codes to block (see “Specifying Area Codes to Block” on page 315).

Viewing, Editing, or Deleting a Site

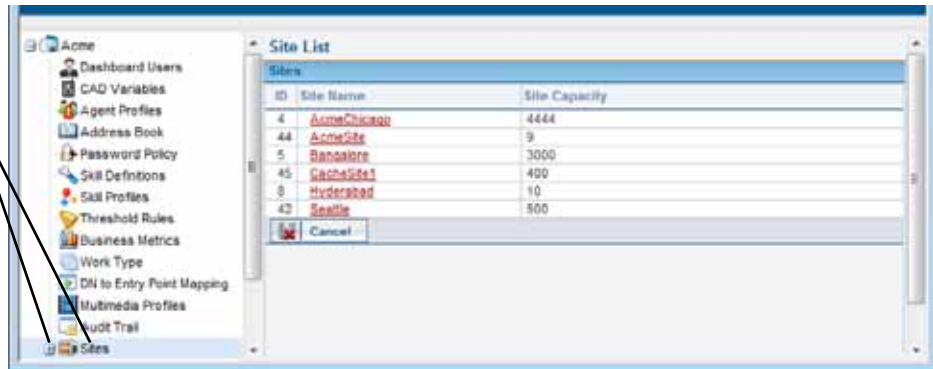
Before attempting to delete a site, be aware of the following:

- A site cannot be deleted if any active teams or any active or suspended agents are associated with it.
- The deleted site continues to be visible in historical reports and in the selection panel of the Provisioning module for 13 months, after which it is permanently removed from the system.
- In the selection panel, the deleted site is represented by a gray icon. You can display the settings for the deleted site as described in the following procedure.

To view, edit, or delete a site:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Sites** link or click the plus sign (+) next to the **Sites** link.

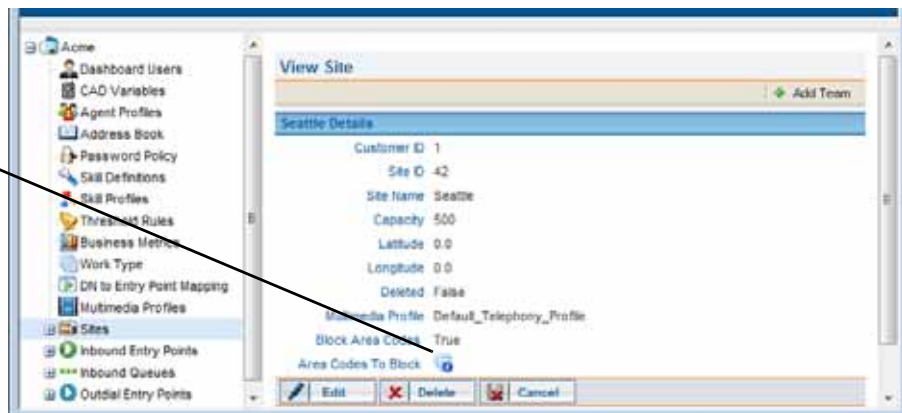
Click the **Sites** link or click the plus sign (+) next to the link, and then click the name of a site.





3. Click the name of the site you are interested in.

The View Site page is displayed in the right panel. For a description of each setting, see the table on [page 312](#).


If area codes are blocked for the site, you can click this icon to display the list of blocked area codes.

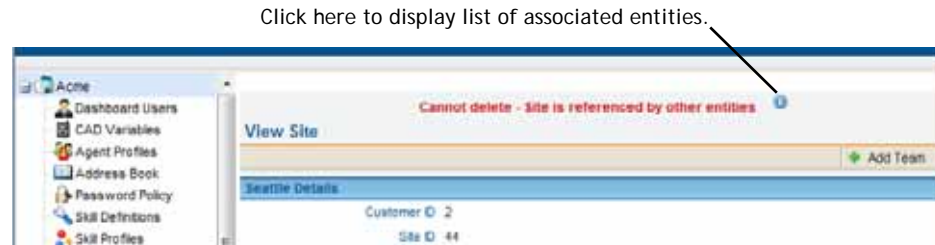


4. If you are viewing a site for which the *Blocked Area Codes* field is set to *True*, you can click the  icon in the **Area Codes to Block** field to open a pop-up window displaying the list blocked area codes.
5. To edit site settings, click the **Edit** button; then, on the Edit Site page, change the settings as appropriate, and then click **Save**. For a description of each setting, see the table on [page 312](#).

If you are editing a site configured to use the blocked area codes feature, you can click the  icon to edit the list of blocked area codes (see [“Specifying Area Codes to Block” on page 315](#) for more information).

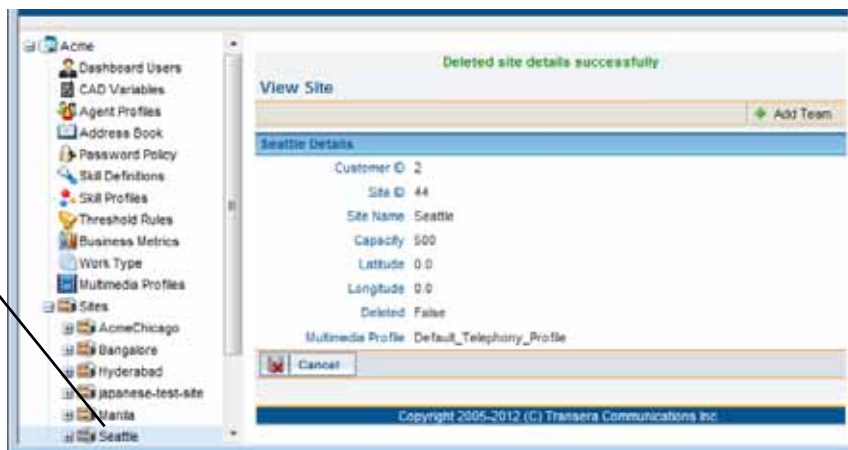
- To delete a site, click **Delete**. Then, in the confirmation dialog box, click **OK**.

If the site is referenced by other entities, a message informs you that the site cannot be deleted; click the  icon at the end of the message to display a list of associated entities and strategies.




- After a site is deleted, it continues to be visible in the selection panel for 13 months, where it is represented by a gray icon.

A gray icon indicates the site has been deleted.



Specifying Area Codes to Block

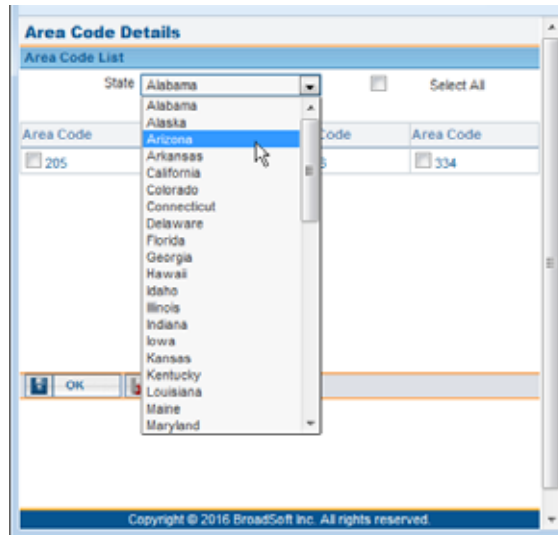
If the *Block Area Code* setting for a site or proxy queue is set to *True*, you can specify the area codes to block for the site or proxy queue as follows:

- While adding or editing a site or proxy queue, click the  icon to open the Area Code Details dialog box.

For more information, see:

- “Adding a Site” beginning on page 312
- “Viewing, Editing, or Deleting a Site” beginning on page 313
- “Adding an Entry Point or Queue” beginning on page 295
- “Viewing and Editing Entry Points and Queues” beginning on page 302

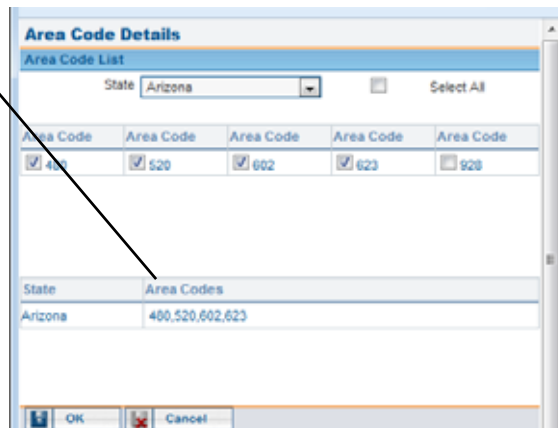
- In the **Area Code Details** dialog box, select a state from the drop-down list.



The area codes for that state are displayed

- Click the check box to the left of each area code you want to block or click the **Select All** check box to select all area codes for the selected state.

The selected area codes are displayed here.



- Repeat steps 2 and 3 until you have selected all the area codes you want to block.
- To remove an area code, select the relevant state from the drop-down list and click the selected check box to clear it.
- When you are finished, click **OK** to save the list of area codes to block.

Skill Definitions

Skills-based routing is an optional CC-One feature that enables you to assign skill requirements, such as language fluency or product expertise, to incoming calls so they can be distributed to agents with a matching set of skills.

The Skill Details page in the Provisioning module provides an interface for viewing, creating, and editing the skills that can be assigned to calls and to skill profiles, which can then be assigned to teams or individual agents (for more information, see [“About Skills-Based Routing” on page 51](#) and [“Skill Profiles” on page 319](#)).

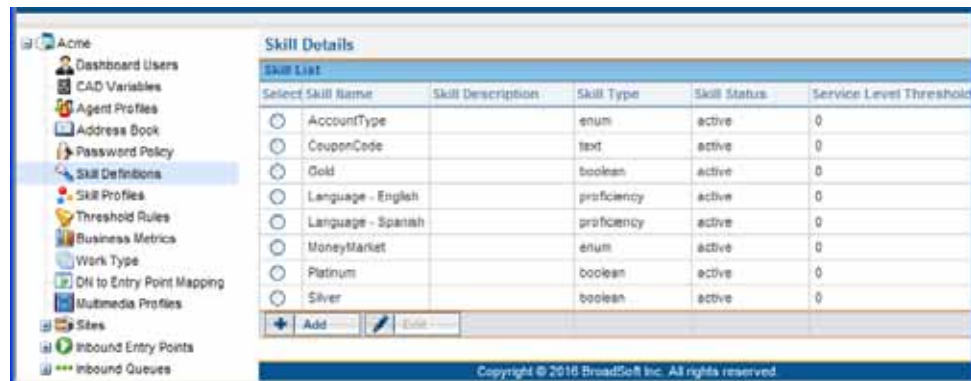
The maximum number of active skills that you can create is determined by the *Maximum Skills* and *Maximum Text Skills* values provisioned for your enterprise (see [“Tenant Settings” on page 290](#) beginning on [page 290](#)).

A skill cannot be deleted, but it can be made inactive if it is not associated with a skill profile or a routing strategy. Inactive skills are not available for use in skill profiles or routing strategies.

To create, view, or edit skill definitions:

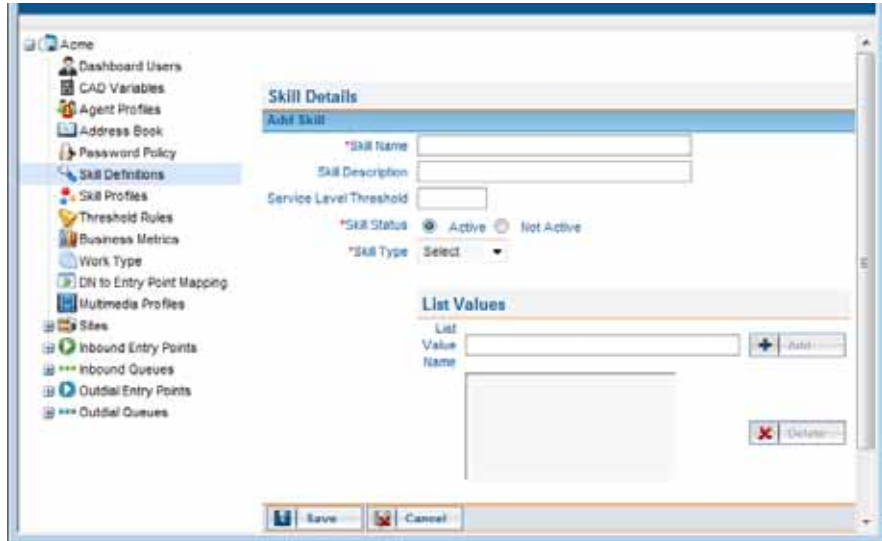
1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Skill Definitions** link.

The Skill Details page is displayed in the right panel.



Select Skill Name	Skill Description	Skill Type	Skill Status	Service Level Threshold
<input type="radio"/> AccountType		enum	active	0
<input type="radio"/> CouponCode		text	active	0
<input type="radio"/> Gold		boolean	active	0
<input type="radio"/> Language - English		proficiency	active	0
<input type="radio"/> Language - Spanish		proficiency	active	0
<input type="radio"/> MoneyMarket		enum	active	0
<input type="radio"/> Platinum		boolean	active	0
<input type="radio"/> Silver		boolean	active	0

3. To create a skill definition, click **Add**.
- OR -
To edit a skill definition, select the button to the left of the skill name and then click **Edit**.
4. In the **Add Skill** or **Edit Skill** page that appears, specify or change the settings for the skill as described in the following table, and then click **Save**.



Setting	Description
Skill Name	Enter a name for the skill.
Skill Description	Optionally, enter a description of the skill.
Service Level Threshold	Specify how many seconds a customer call can be in queue for this skill before being flagged as outside service level. If a call is completed within this time interval, it is considered to have been handled within service level for this skill.
Skill Status	Specify whether the skill is Active or Not Active . A skill cannot be made inactive if it is used in a skill profile or a routing strategy.
Skill Type	<p>If you are creating a new skill, specify the skill type (you cannot change the skill type):</p> <ul style="list-style-type: none"> • proficiency. Can have a value ranging from 0 to 10 that represents the agent's level of expertise in the skill. For example, you might define a skill for each language that your agents speak. • boolean. Can have the value of True or False to indicate whether or not the agent has the skill. For example, you might define a skill named <i>PremierService</i> to ensure that your most valuable customers get the best service. Your most experienced agents can be assigned a value of True, and your least experienced agents can be assigned a value of False • text. A free-form text skill that must be matched exactly. For example, you might define a skill named <i>Extension</i> that will let you route a call to a specific agent's extension number based on digits entered by the caller in response to a prompt. The text value can include up to 40 characters, including spaces. • enum. A named set of predefined values. For example, a skill named <i>Line of Business</i> might have a set of three values: <i>Sales</i>, <i>Service</i>, and <i>Billing</i>. Each value can include up to 20 characters, including spaces.

Setting	Description
List Values	<p>If the skill type is <i>enum</i>, use the controls in this section to define or change the values that can be associated with this skill. For example, for an enum skill named <i>Operating System</i>, you might define three values: <i>Windows</i>, <i>Linux</i>, and <i>Unix</i>. Each value is limited to a maximum length of 20 characters, including spaces.</p> <ul style="list-style-type: none"> To add a value, type the name for the value in the List Value Name field and then click the Add button. To delete a list value, select the value in the list box and then click the Delete button.

Skill Profiles

A skill profile is a set of skills, each with an assigned value, that can be assigned to an agent-based team or to an individual agent. For example, a skill of English might be assigned a high level of proficiency in one skill profile and a lower level in another profile.

If a skill profile is assigned to a team, all agents logged in to that team are associated with that skill profile unless the agent is assigned a specific skill profile.

To create, copy, edit, or view a skill profile:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Skill Profiles** link.

The Skill Profile List page is displayed in the right panel.



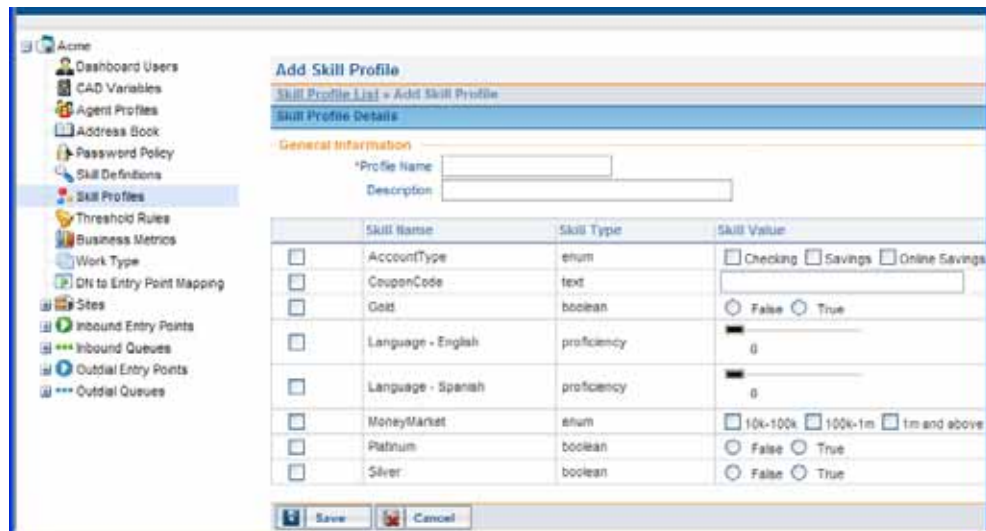
3. Do one of the following:

- To view the settings for an existing skill profile, click a profile name.
- To create a new skill profile, click **Add**.
- To copy or edit an existing profile, either click the button to the left of a listed profile, and then click **Copy** or **Edit**.

- OR -

Click the name of a listed profile and, on the page that appears, click **Copy** or **Edit**.

4. In the **Add Skill Profile** or **Edit Skill Profile** page that appears, enter or change the name and optional description of the skill profile.



5. Select or clear the check box to the left the name of each skill you want to add to or remove from the skill profile, and specify the value of each selected skill as described in the following table.

For this skill type	Do this to specify the skill value
proficiency	Drag the slider to a number between 0 and 10 to indicate how proficient the agent is in this skill.
boolean	Click one of the radio buttons to specify whether the agent has this skill (True) or does not have the skill (False).
text	Enter a maximum of 40 characters (including spaces).
enum	Select the check box next to each list value that represents a skill the agent has.

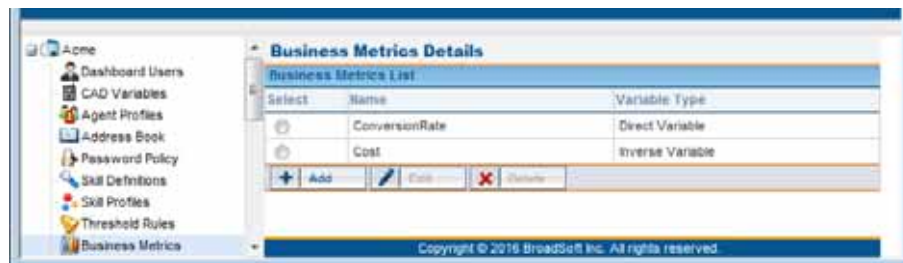
6. Click **Save** to save the skill profile.

Business Metrics

If your enterprise subscribes to CC-One Scorecard Routing, you can add business metrics for use in call routing decisions (see “About CC-One Scorecard Routing” on page 53).

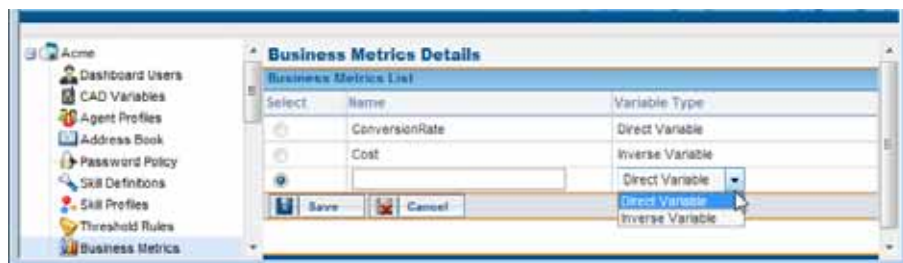
To view, create, or edit a business metric:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Business Metrics** link. The Business Metrics Details page is displayed in the right panel.



3. To create or edit a business metric, do one of the following:
 - To create a business metric, click **Add**.
 - To edit a business metric, select the button to the left of the business metric name and then click **Edit**.
4. Specify or change the settings for the business metric you are adding or editing as described in the following table, and then click **Save** or **Update**.

Note: You cannot edit the variable type of a business metric that is referenced in a routing strategy.



Setting	Description
Name	Enter the name of the business metric.

Setting	Description
Variable Type	<p>Select a value from the drop-down list:</p> <ul style="list-style-type: none"> • Direct Variable. The variable's impact on the routing decision increases as the value of the variable increases; for example, Conversion Rate. • Inverse Variable. The variable's impact on the routing decision decreases as the value of the variable increases; for example, Cost.

Teams

A team is a group of people who support a specific group of functions; for example, *Gold Customer Service* or *Billing* Teams are added to sites.

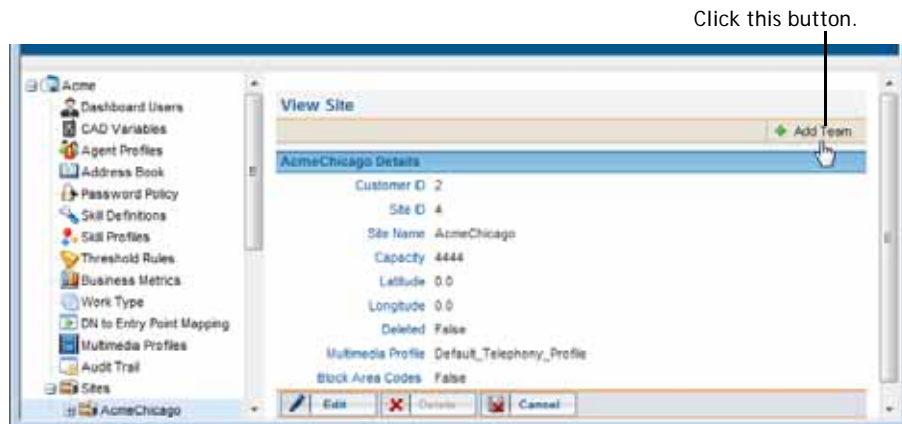
Topics covered in this section:

- [Adding a Team](#)
- [Viewing, Editing, or Deleting a Team](#)

Adding a Team

To add a new team:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Sites** link or click the plus sign (+) next to the **Sites** link, then click the name of the site to which you want to add a team, and then click the **Add Team** button on the upper right side of the **View Site** page.



3. Specify settings for the team as described in the following table, and then click **Save** to add the team to the site.

Setting	Description
General Settings	
Team Name	Enter a team name, preferably one that indicates the team's function—for example, <i>Billing</i> or <i>Customer Support</i> .
Team Type	Specify the team type: <ul style="list-style-type: none"> • Agent Based. The team has a specific number of agents assigned to it. These agents use the CC-One Agent Desktop to interface with the CC-One system. • Capacity Based. The team does not have specific agents assigned to it, and the agents do not use the CC-One Agent Desktop. A capacity-based team might be used to represent a voice mailbox or an agent group that is not managed by the CC-One system. The capacity of such teams is determined by the Capacity setting, which can be overwritten by team capacity strategies defined in the Routing Strategy module. For more information, see "About Team Types" on page 102.
Team Status	Select In Service (team is available to handle calls) or Not Available .
Advanced Settings	
Team DN	This setting is enabled only if <i>Capacity Based</i> is specified in the <i>Team Type</i> field. Enter the dial number where calls will be distributed for this team.
Priority	Reserved for future use. Enter a "dummy" value here.

Setting	Description
Capacity	<p>If <i>Capacity Based</i> is specified in the <i>Team Type</i> field, specify the maximum number of simultaneous calls that this team can handle. You can specify a maximum of up to 10,000. Calls will be routed to other sites or will be queued after the team capacity has been reached.</p> <p>You can create scheduled team capacity strategies to override this setting in response to changing call center conditions. If a team capacity strategy is not created for a capacity-based team, the system uses this capacity value. For more information, see “Scheduling Team Capacity” on page 140.</p>
Skill Profile	<p>If your enterprise uses the optional Skills-Based Routing feature, you can optionally select a skill profile for this team (see “Skill Profiles” on page 319 for more information).</p> <p>You cannot assign a skill profile to a capacity-based team.</p>
Multimedia Profile	<p>If Multimedia is enabled for your enterprise, optionally select a multimedia profile for this team (see “Multimedia Profiles” on page 307 for more information). This profile overrides the multimedia profile assigned to the site where this team is located.</p> <p>You cannot assign a multimedia profile to a capacity-based team.</p>
Agents	<p>If this is an agent-based team and agents have already been provisioned, you can assign agents to the team by selecting them in the Available Agents list and clicking the right arrow to move them to the Selected Agents list. (See “Adding an Agent” on page 352.)</p>

Viewing, Editing, or Deleting a Team

Before attempting to delete a team, be aware of the following:

- A team cannot be deleted if it is used in a strategy, or if a skill profile or multimedia profile is assigned to it, or if any active or deleted agents are assigned to it, unless the agents have been permanently removed from the system (deleted agents are permanently removed after 100 days).
- The deleted team continues to be visible in historical reports for 13 months, after which it is permanently removed from the system.
- The deleted team also continues to be visible in the selection panel of the Provisioning module for 13 months, where it is represented by a gray icon. You can display the settings for the deleted team as described in the following procedure, and authorized users can click the Activate button to activate it.

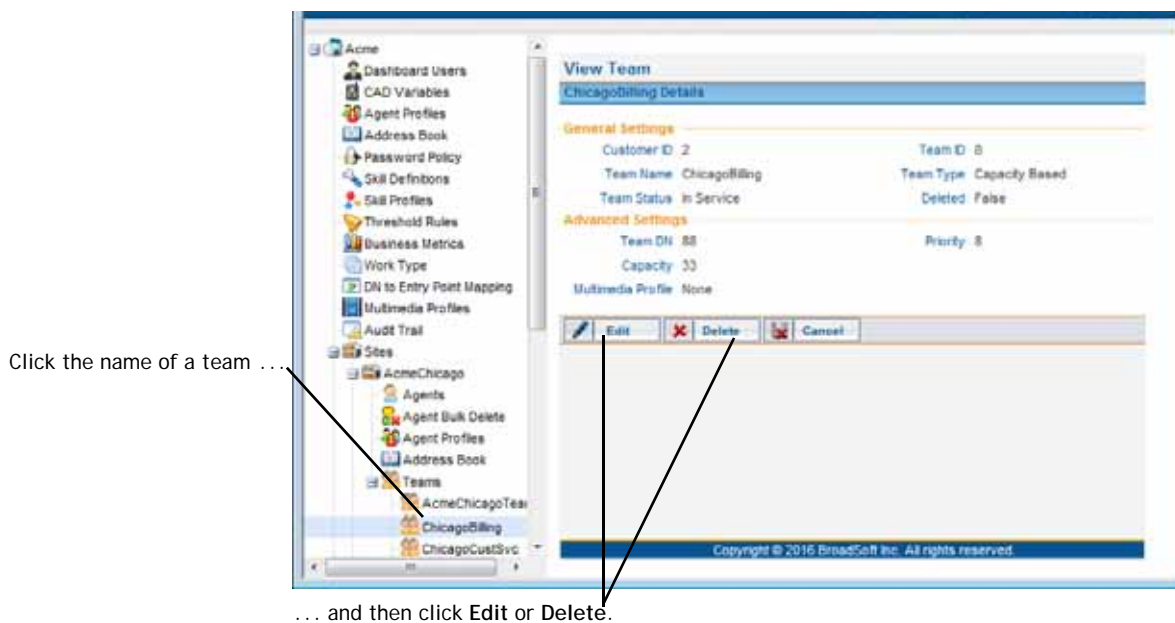
To view or edit the settings for a team or to delete a team:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the plus sign (+) next to the **Sites** link, and then click the plus sign next to the name of the site you are interested in.
3. Click the **Teams** link or click the plus sign next to the **Teams** link, and then click the name of a team.

The View Team page is displayed in the right panel. For a description of each setting, see the table on [page 323](#).

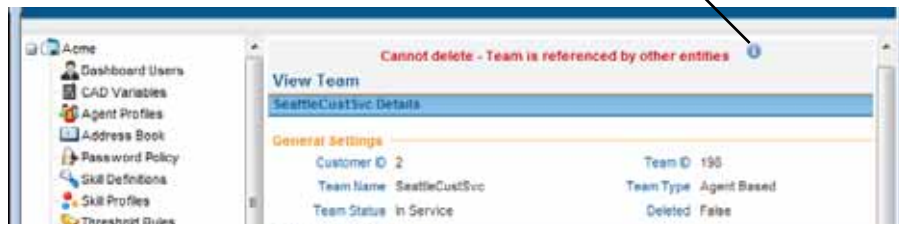
If agents are assigned to the team, the page displays a list of their names.

4. From the View Team page, you can do the following:
 - To edit the settings for a team, click **Edit**, make changes, and then click **Save**.
You cannot change the team status from *In Service* to *Not Available* if the team is part of a routing strategy.
 - To delete a team, click **Delete**. Then, in the confirmation dialog box, click **OK**.



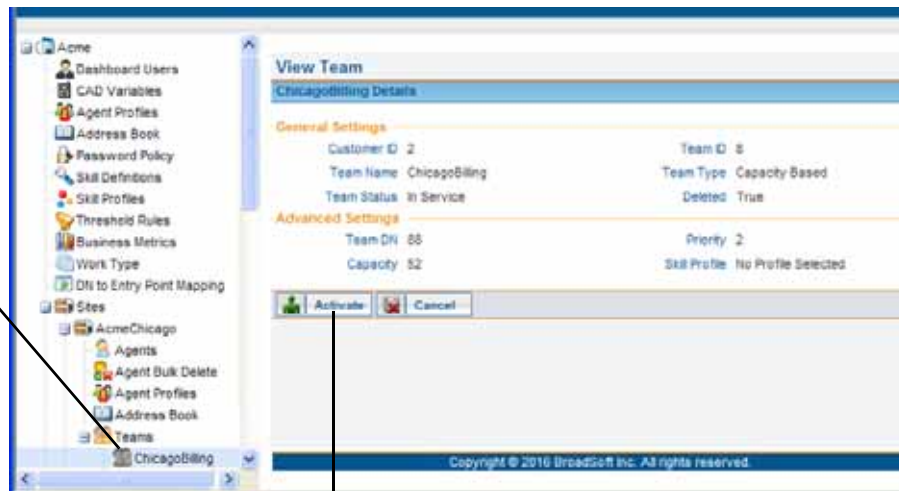
If the team is referenced by other entities, a message informs you that the team cannot be deleted; click the **i** icon at the end of the message to display a list of associated entities.

Click here to display a list of associated entities.



- After a team is deleted, it continues to be visible in the selection panel, where it is represented by a gray icon. Authorized users can activate the deleted team by clicking the name of the team, and then clicking **Activate**.

A gray icon indicates the team has been deleted.



Click this button to activate the deleted team.

Threshold Rules

If your enterprise uses the Threshold Alerts feature, authorized users can create threshold rules to monitor agent and call data.

When a threshold is breached, an alert is sent to the CC-One Real-Time Reports module where it can be viewed, acknowledged, and archived by authorized users (see [“Monitoring Threshold Alerts” on page 200](#)). In addition, a threshold rule can specify one or more email addresses to which alert notifications will be sent when a threshold is breached.

If both the Threshold Alerts feature and the Seatmap module are enabled for your enterprise, you can also create Seatmap threshold rules for sites, teams, and agents with threshold values for two severity levels: warning and critical. When a threshold configured for Seatmap is breached, an alert is sent to the Seatmap module (see [“Seatmap” beginning on page 407](#) for more information about this module).

A threshold alert can be displayed in the Agent Personal Statistics window and in the agent's Seatmap window if *Agent Viewable* is set to *True* for the threshold rule and the threshold alert is selected in the agent profile assigned to the agent (see “[Agent Profiles](#)” on page 342).

Threshold rules can be configured for the call and agent metrics listed in the following table. For each rule, you specify a value that will trigger the alert and one of the following operands:

- > greater than
- >= greater than or equal to
- < less than
- <= less than or equal to
- = equal to

Metric	Entity Type	Trigger Value Type
Call Metrics		
Abandoned Calls	Queue	Count
Average Queue Time	Queue	Duration
Average Speed of Answer	Queue	Duration
Blind Transferred Calls	Queue	Count
IVR Calls	Entry Point	Count
Longest Time in Queue	Queue	Duration
Number of Calls in Queue	Queue	Count
Overflow Calls	Queue	Count
Service Level Threshold	Queue	Percentage
Short Calls	Entry Point or Queue	Count
Transferred Calls	Queue	Count
Agent Metrics		
Available Agents	Site or Team	Count
Connected Agents	Site or Team	Count
Current Available Time	Agent	Duration
Current Connected Time	Agent	Duration
Current Hold Time	Agent	Duration
Current Idle Time	Agent	Duration
Current Wrap-up Time	Agent	Duration
IB Average Handle Time	Site or Team	Duration
Idle Agents	Site or Team	Count
Not Responding Agents	Site or Team	Count
Number of Agents in Outdial	Site or Team	Count
Number of Logged in Agents	Site or Team	Count

Metric	Entity Type	Trigger Value Type
OB Average Handle Time	Site or Team	Duration
Occupancy	Site or Team	Percentage
Total Available Time	Agent	Duration
Total Idle Time	Agent	Duration

The maximum number of threshold rules that you can create is determined by the *Maximum Threshold Rules* value provisioned for your enterprise (see “[Tenant Settings](#)” on page 290 beginning on page 290).

To view, edit, or create a threshold rule:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Threshold Rules** link.

The Threshold Rule Details page is displayed in the right panel.

This icon indicates that the threshold alert is agent viewable.



3. To create a threshold rule, click **Add**.
- OR -
To copy or edit a threshold rule, select the button to the left of the threshold rule, and then click **Copy** or **Edit**.
4. In the **Add Threshold Rule** or **Edit Threshold Rule** page that appears, specify the settings for the threshold rule as described in the following table, and then click **Save**.

The screenshot shows the 'Threshold Rule Detail' configuration interface. The left sidebar lists various system components, with 'Threshold Rules' selected. The main area contains the following fields and options:

- Rule Name:** Text input field.
- Rule Description:** Text input field.
- Agent Viewable:** Radio buttons for True (selected) and False.
- Entity Type:** Select dropdown menu.
- Entity:** Select dropdown menu.
- Metric Type:** Radio buttons for Agent Threshold (selected) and Call Threshold.
- Active:** Radio buttons for False and True (selected).
- Threshold Alerts For:** Radio buttons for ACD, Seatmap (selected), and Both.
- Threshold Parameters:** A section with a red note 'Critical value only for seatmap'. It includes:
 - Metric Key:** Select dropdown menu.
 - Operand:** Select dropdown menu.
 - Trigger Value:** Text input field.
 - Trigger Interval (seconds):** Text input field.
 - Critical Value:** Text input field.
- Selected Recipients:** Two sections, each with an 'Add Rich Text Email Recipient' and 'Add Plain Text Email Recipient' button, followed by a list box for recipients.

At the bottom, there are 'Save' and 'Cancel' buttons.

Setting	Description
Rule Name	Enter a name for the rule.
Rule Description	Enter a short description of the rule.
Agent Viewable	Select True or False to specify whether an alert can be sent to agents when the threshold rule is breached. If True , this rule will be available for selection in the <i>Agent Thresholds</i> tab when you create or edit an agent profile (see “Agent Profiles” on page 342).
Entity Type	Select the entity type that the threshold rule will apply to: Entry Point, Queue, Site, Team, or (if your enterprise uses the Agent Threshold Alerts feature) Agent.
Entity	Select the entry point, queue, site, or team that the rule will apply to. This field is not applicable if the entity type is <i>Agent</i> .
Metric Type	Specify whether this is an agent threshold or a call threshold.
Active	Select True or False to specify whether or not the threshold is active.
Threshold Alerts For	This setting appears only if the Seatmap feature is enabled for your enterprise. Specify whether this alert is for ACD or Seatmap or Both .

Setting	Description
Threshold Parameters	<p>Specify parameters for the threshold rule:</p> <ul style="list-style-type: none"> • Metric Key. Select a value from the drop-down list. The list displays only those metrics that are applicable to the selected entity type. • Operand. Select a value from the drop-down list: <ul style="list-style-type: none"> > (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to) • Trigger Value. Specify the value that will trigger a threshold alert or, for a Seatmap threshold, the value that will trigger a warning alert. The value type (duration, count, or percentage) is based on the metric selected. <p>The trigger value must be greater than 0 for all metrics except <i>Available Agents</i>, <i>Connected Agents</i>, <i>Number of Agents in Outdial</i>, and <i>Number of Logged in Agents</i>.</p> • Trigger Interval (seconds). Specify the interval, in seconds, during which the system will generate only one alert for the threshold rule check. • Critical Value. This parameter appears only if the Seatmap feature is enabled for your enterprise. Specify the value that will trigger a critical alert.
Add Rich Text Email Recipient	<p>If you want an email alert to be sent to an individual when the threshold is triggered, enter the email address in either the Add Rich Text Email Recipient or the Add Plain Text Email Recipient field, and then click the Add Email (✉️) button to add the address to the Selected Recipients list. Repeat for each recipient you want to add.</p> <p>To remove a recipient, select it in the Selected Recipients list, and then click the Remove Email (✉️) button.</p>
Add Plain Text Email Recipient	

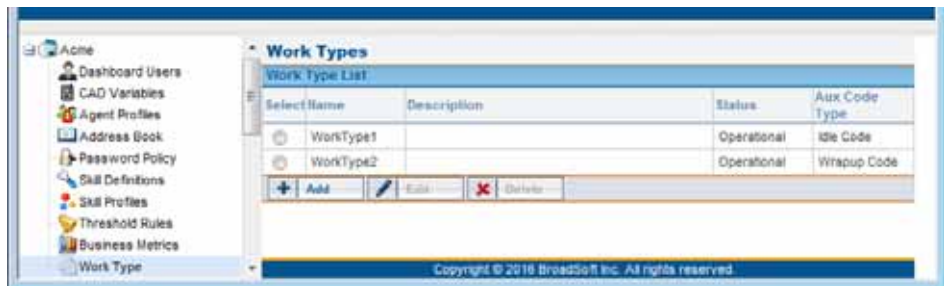
Work Types

When you create an idle or wrap-up code, you associate it with a work type—a value that can be used to group idle and wrap-up codes in auxiliary reports.

To create or edit a work type:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Work Type** link.

The Work Types page is displayed in the right panel.



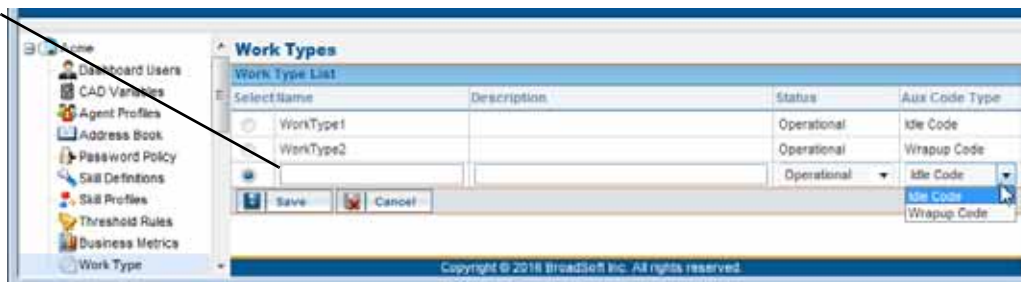
3. To create a work type, click **Add**.

- OR -

To edit a work type, select the button to the left of the work type, and then click **Edit**.

4. Specify or change the settings for the work type you are adding or editing as described in the following table, and then click **Save** or **Update**.

Specify settings for the new work type in the available fields beneath the list of existing work types.



Setting	Description
Name	Enter a name for the work type.
Description	Optionally, enter a description of the work type.
Status	Select a status: <ul style="list-style-type: none"> • Operational. The work type can be assigned to an auxiliary code. • Non-operational. The work type cannot be assigned to an auxiliary code.

Setting	Description
Aux Code Type	Select either Idle Code or Wrapup Code to specify the type of auxiliary code this work type can be associated with.

Idle and Wrap-up Codes

Idle and wrap-up codes are selected by agents when they are logged in to the CC-One Agent Desktop.

- Idle codes typically indicate why an agent is not available to take calls, such as a lunch break or meeting.
- Wrap-up codes indicate the result of the call—for example, a sale was made or a call was escalated.

Each idle and wrap-up code is associated with a work type—a value that can be used to group idle and wrap-up codes in auxiliary reports (see [“Work Types” on page 331](#)).

You make idle and wrap-up codes available to agents by adding them to an agent profile and then assigning the agent profile to the agents. At least one idle code and one wrap-up code must be included in an agent profile. (For more information, see [“Agent Profiles” on page 342](#).)

Note: If your enterprise uses the outdial feature, it is recommended that you create a wrap-up code such as “Outdial Failed” that agents can enter when they are placed in the Wrap Up state after initiating an outdial call that fails to be connected.

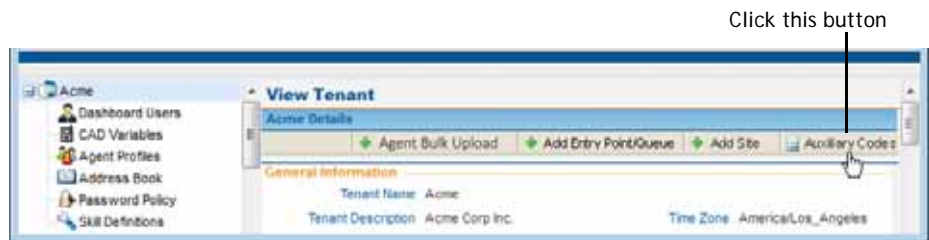
Topics covered in this section:

- [Creating an Idle or Wrap-up Code](#)
- [Viewing or Editing Idle and Wrap-up Codes](#)

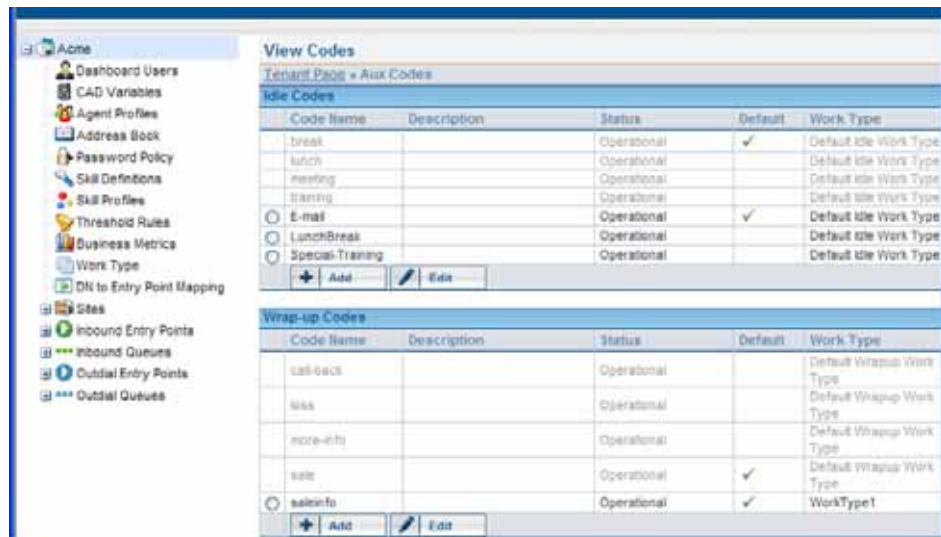
Creating an Idle or Wrap-up Code

To create an idle or wrap-up code:

1. Click the **Provisioning** link on the CC-One Management Portal or, if the Provisioning module is already open, click the link in the left panel that represents your enterprise to display the View Tenant page.
2. Click the **Auxiliary Codes** button beneath the page title bar.



The View Codes page appears in the right panel.

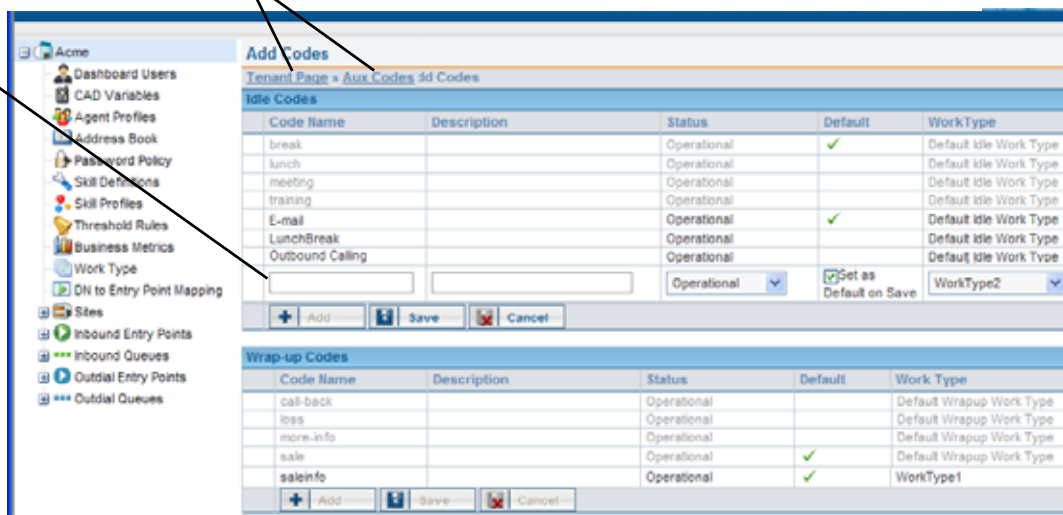


3. Click the **Add** button beneath the Idle Codes or Wrap-up Codes list.

The Add Codes page appears in the right panel.

Click one of these links to return to a previous page.

Specify settings for the new code in the available fields beneath the list of existing codes.



4. Specify the settings for the code in the available fields beneath the list of existing codes, as described in the following table, and then click **Save**.

Setting	Description
Code Name	Enter the code name that agents will see on the Agent Desktop.
Description	Enter an optional description of the code.
Status	Select a status: <ul style="list-style-type: none"> Operational. The code is immediately available to agents. Non-operational. The code is defined and can be added to an agent profile, but will not be available on the Agent Desktop.
Default	Select or clear the Set As Default on Save button to indicate whether this is the default code. <ul style="list-style-type: none"> If this is the first idle or wrap-up code to be created, you must make it the default, but you can modify it later after more than one code is defined. If another default code exists when you select Set as Default on Save, it will no longer be the default after you click Save. The default idle and wrap-up codes must be included in agent profiles (see “Agent Profiles” on page 342). <ul style="list-style-type: none"> The default wrap-up code is used when the agent’s profile specifies Auto Wrap Up. Such agents do not enter wrap-up codes. Instead, they automatically go into the Available state after completing an incoming call and automatically go into the Idle state after making an outdial call. The default idle code is used when the agent initially logs in and after the agent makes an outdial call if the agent’s profile specifies Auto Wrap Up.
Work Type	Select the work type you want to associate with this code.

Viewing or Editing Idle and Wrap-up Codes

To view or edit idle and wrap-up codes that have been created for your enterprise:

1. Click the **Provisioning** link on the CC-One Management Portal or, if the Provisioning module is already open, click the link in the left panel that represents your enterprise to display the View Tenant page.
2. Click the **Auxiliary Codes** button beneath the page title bar.

The View Codes page appears in the right panel. The system-supplied codes are shown in gray text and codes defined for your enterprise are shown in black text.

View Codes				
Tenant Page - Aux Codes				
Idle Codes				
Code Name	Description	Status	Default	Work Type
break		Operational	✓	Default Idle Work Type
lunch		Operational		Default Idle Work Type
meeting		Operational		Default Idle Work Type
training		Operational		Default Idle Work Type
E-mail		Operational	✓	Default Idle Work Type
LunchBreak		Operational		Default Idle Work Type
Outbound Calling		Operational		Default Idle Work Type
Special-Training		Operational		WorkType2
+ Add Edit				
Wrap-up Codes				
Code Name	Description	Status	Default	Work Type
call back		Operational		Default Wrapup Work Type
iss		Operational		Default Wrapup Work Type
non-info		Operational		Default Wrapup Work Type
site		Operational	✓	Default Wrapup Work Type
salesinfo		Operational	✓	WorkType1
+ Add Edit				

3. To edit a code:
 - a. Select the button to the left of the code name, and then click **Edit**.
 - b. On the **Edit Codes** page, make changes, and then click **Save**.

For a description of each setting, see the table in the previous section.

Address Books

Topics covered in this section:

- [About Address Books](#)
- [Creating, Editing, and Deleting Address Books and Address Book Entries](#)

About Address Books

Agents can be given access to an address book from which they can select an entry to dial instead of entering text in the Call Out or DN field.

You can create address books that are available to all sites or only to a specific site.

You make an address book available to agents by adding it to an agent profile and then assigning the agent profile to the agent. (For more information, see [“Agent Profiles” on page 342](#).)

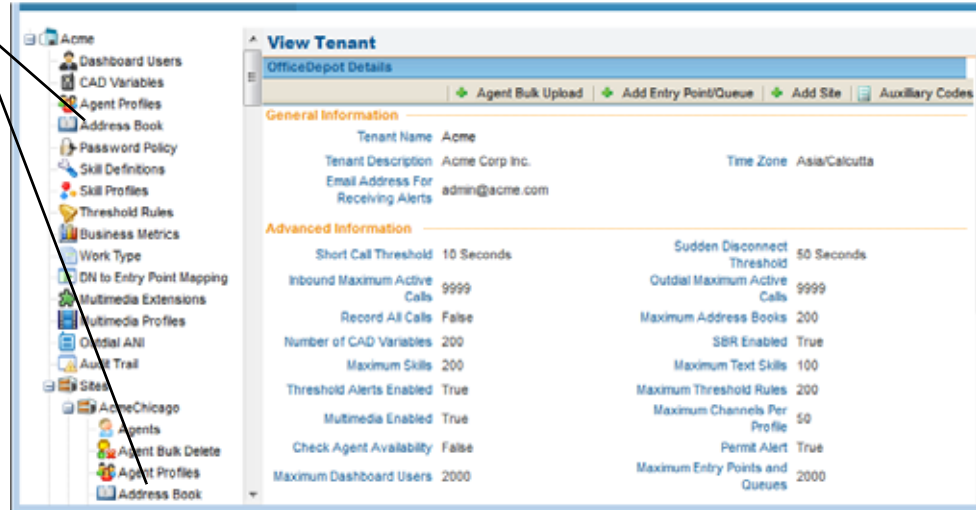
The number of address books that you can create is determined by the *Maximum Address Books* value provisioned in the tenant settings for your enterprise (see [“Tenant Settings” on page 290](#)).

Creating, Editing, and Deleting Address Books and Address Book Entries

To create a new address book or edit or delete an existing one:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, do one of the following:
 - For an enterprise-wide address book, click the **Address Book** link.
 - For a site-specific address book, click the plus sign (+) next to the **Sites** link, then click the plus sign next to the name of a site, and then click the **Address Book** link beneath the site name.

Click the **Address Book** link at the tenant level or at the site level



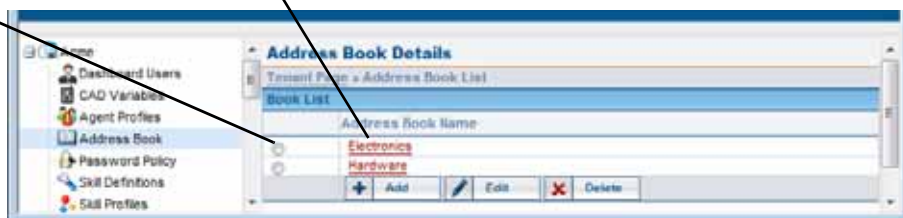
The Address Book Details page is displayed in the right panel.

3. Do one of the following:

- To view the settings for an address book, click an address book name.
- To create a new address book, click **Add**.
- To edit an address book, select the button to the left of the address book name, and then click **Edit**, or alternatively, click the name of an address book and then click **Edit** on the page that appears in the right panel.
- To delete an address book, select the button to the left of the address book name, and then click **Delete**. Then, in the confirmation dialog box, click **OK**.

To view the settings for an address book, click an address book name.

Click the button to the left of an address book name to select the address book.



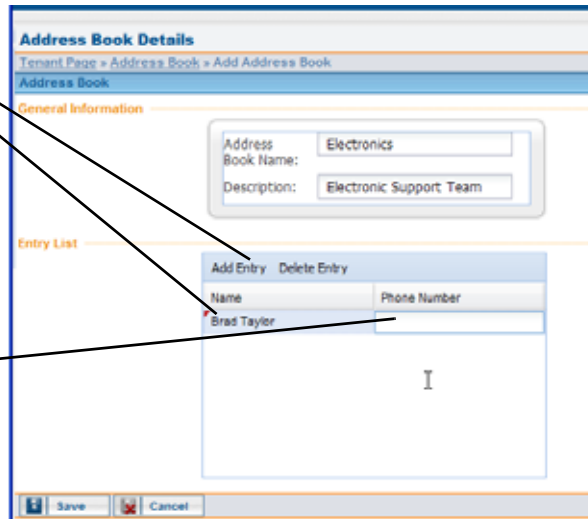
4. If you are creating or editing an address book, the right panel displays a page where you can enter or edit the name and optional description for the address book.

5. To add an entry to the address book:
 - a. In the **Entry List** section of the page, click **Add Entry**.
 - b. In the field that appears, click in the **Name** column and type the entry name.
 - c. Click in the **Phone Number** column and type the phone number for the entry.

Click Add Entry...

... then click in this field and type the entry name ...

... then click in this field, and type the entry phone number



6. Repeat the previous step to add additional entries.
7. To edit an entry, double-click in the field you want to change to create an insertion point, then select the text you want to edit, and type the new text.
8. To delete one or more entries, select the entries, and then click **Delete Entry**.

To select multiple entries, press and hold the CTRL key on your keyboard, and then click the entries you want to select.
9. When finished, click **Save** if you are adding a new address book or **Update** if you are editing an existing one.

Outdial ANI

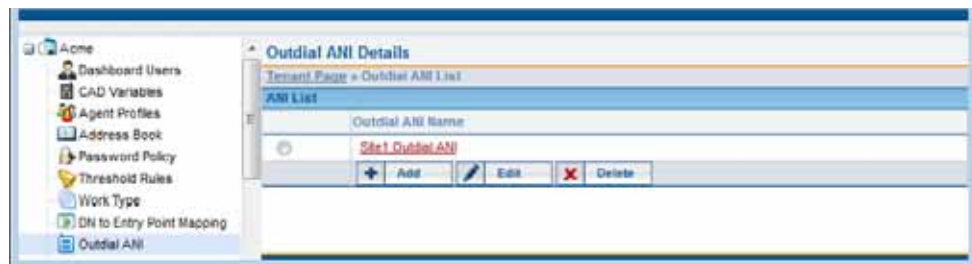
The Outdial ANI feature provides a way for an agent to select the phone number that will be sent as the caller ID to the recipient of an outdial call.

You make an outdial ANI list available to the agent by adding it to an agent profile and then assigning the agent profile to the agent. (For more information, see “[Agent Profiles](#)” beginning on [page 342](#).)

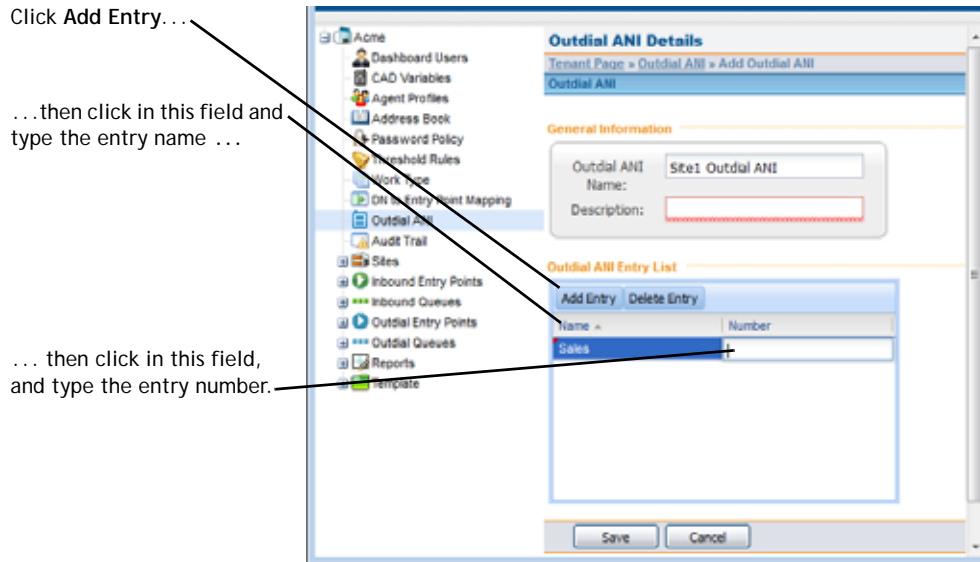
To create or edit a list of outdial ANIs:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Outdial ANI** link.

The Outdial ANI Details page is displayed in the right panel.



3. To create an outdial ANI list, click **Add**.
- OR -
To edit a list, select the button to the left of the ANI list name, and then click **Edit**.
4. The right panel displays a page where you can enter or edit the name and optional description for the Outdial ANI list.
5. To add an entry to the list:
 - a. In the **Outdial ANI Entry List** section of the page, click **Add Entry**.
 - b. In the field that appears, click in the **Name** column and type a name for entry.
 - c. Click in the **Phone Number** column and type the phone number for the entry.



6. Repeat the previous step to add additional entries.
7. To edit an entry, double-click in the field you want to change to create an insertion point, then select the text you want to edit and type the new text.
8. To delete one or more entries, select the entries, and then click **Delete Entry**.
To select multiple entries, press and hold the CTRL key on your keyboard, and then click the entries you want to select.
9. When finished, click **Save** if you are adding a new Outdial ANI list or **Update** if you are editing an existing list.

Password Policy

A password policy is a set of rules governing the required length, duration, valid characters, and other characteristics of passwords. The default password policy applies to both agent and Management Portal user accounts unless another password policy is assigned to the user or to the agent profile assigned to the agent.

To create or edit a password policy:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Password Policy** link.

The Password Policy Details page is displayed in the right panel.



3. To create a password policy, click **Add**.

- OR -

To edit a password policy, select the button to the left of the policy name, and then click **Edit**.

4. Specify or change the settings for the password policy you are adding or editing as described in the following table, and then click **Save**.



Setting	Description
Policy Name	Enter a name for the policy.
Policy Description	Optionally, enter a description of the policy.

Setting	Description
Default	Select YES or NO to specify whether or not this is the default password policy for agent and Management Portal user accounts.
Password Length	Specify the minimum number of characters required in a password.
Maximum Invalid Attempts	Specify the number of times a user can enter an incorrect password before being locked out.
Number of Saved Passwords	Specify the number of unique passwords a user must use before a previous password can be reused.
Password Expiry Period	Specify the number of days a password can be used before the user must change it.
Must Contain At Least One Uppercase Letter	Select YES or NO to specify whether or not a password must include at least one uppercase letter.
Must Contain At Least One Lowercase Letter	Select YES or NO to specify whether or not a password must include at least one lowercase letter.
Must Contain At Least One Digit	Select YES or NO to specify whether or not a password must include at least one digit.

Agent Profiles

An agent profile is a group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies permissions relating to queue transfers, agent consults and transfers (“buddy teams”), wrap-up and idle codes, wrap-up timeout values, agent auto-available, dialing capabilities and behaviors, restrictions on the DN the agent can enter to log in to the Agent Desktop, and access to current personal, queue, and team statistics.

Topics covered in this section:

- [Viewing, Creating, Editing, and Deleting Agent Profiles](#)
- [General Information Settings](#)
- [Auxiliary Code Settings](#)
- [Collaboration Settings](#)
- [Dial Plan Settings](#)
- [Agent DN Validation Settings](#)
- [Agent Viewable Statistics Settings](#)
- [Agent Threshold Settings](#)

Viewing, Creating, Editing, and Deleting Agent Profiles

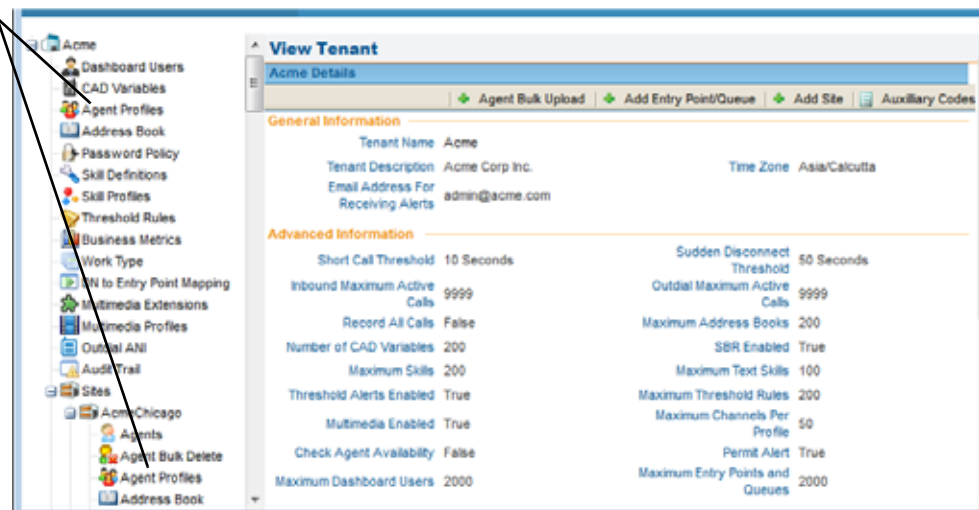
You can create an agent profile that will be available for all agents at your enterprise or only for agents at a specific site.

Note: You cannot delete an agent profile that is assigned to an agent.

To view, create, edit, or delete an agent profile:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, do one of the following:
 - For an enterprise-wide profile, click the **Agent Profiles** link.
 - For a site-specific profile, click the plus sign (+) next to the **Sites** link, then click the plus sign next to the name of a site, and then click the **Agent Profiles** link beneath the site name.

Click the Agent Profiles link at the tenant level or at the site level.



The Agent Profile List page is displayed in the right panel.



3. Do one of the following:
 - To view the settings for an existing agent profile, click a profile name.
 - To add a new agent profile, click **Add**.
 - To copy or edit an existing profile, either click the button to the left of a listed profile, and then click **Copy** or **Edit**.

- OR -

Click the name of a listed profile and, on the page that appears, click **Copy** or **Edit**.

 - To delete a profile, click the button to the left of the profile you want to delete, and then click **Delete**. Then, in the confirmation dialog box, click **OK**.

4. If you are adding, copying, or editing a profile, specify settings in each tab of the **Add Agent Profile** or **Edit Agent Profile** page that appears in the right panel. Settings are described in the following sections. When finished, click **Save**.
 - “General Information Settings” on page 344
 - “Auxiliary Code Settings” on page 345
 - “Collaboration Settings” on page 346
 - “Dial Plan Settings” on page 347
 - “Agent DN Validation Settings” on page 349
 - “Agent Viewable Statistics Settings” on page 349
 - “Agent Threshold Settings” on page 350

General Information Settings

The General Information tab of the Agent Profile page displays the settings described in the following table.

Setting	Description
Profile Name	Enter a descriptive name for the profile.
Profile Description	Optionally, enter a description of the profile.
Status	Select a status: <ul style="list-style-type: none"> • Operational. The profile can be assigned to an agent. • Non-operational. The profile cannot be assigned to an agent.
Password Policy	Leave the default setting or select a password policy from the drop-down list (see “ Password Policy ” on page 341 for more information).
Screen Popups	Select Yes or No to specify whether or not external pop-up screens will be allowed.

Setting	Description
Last Agent Routing	This setting appears only if the Last Agent Routing feature is enabled for your enterprise. Select Yes or No to specify whether to display the Last Agent Routing check box on the Agent Desktop during Wrap Up. Agents can select this check box to request that the call be routed to them the next time the customer calls for the same issue.

Auxiliary Code Settings

The Auxiliary Codes tab of the Agent Profile page displays settings for specifying wrap-up and idle code availability and permissions related to wrap up and agent auto-available.


Setting	Description
Wrap Up Settings	<p>Select the Auto Wrap Up with Time Out Of button and enter a value in the available field if you want the default wrap-up code to be automatically entered after the agent completes a call unless the agent selects a code within the number of seconds specified in the field.</p> <p>Select Manual Wrap Up if you want the agent to select a wrap-up code after completing a call. No timeout is associated with manual wrap-up.</p>
Agent Available After Outdial	<p>Select Yes if you want the agent to go into the Available state after completing and wrapping up an outdial call unless the agent selects the <i>To Idle</i> check box.</p> <p>Select No if you want the agent to go into the Idle state after completing and wrapping up an outdial call.</p>
Allow Auto Wrapup Extension	Select Yes if you want agents to be able to cancel the auto wrap-up time, allowing them to extend the wrap-up time. The Cancel Wrap-up button is displayed while the agent is in auto-wrap-up mode.
Wrap Up Codes	<p>Specify which wrap-up codes will be available in the drop-down list on the Agent Desktop:</p> <ul style="list-style-type: none"> • Select All to make all wrap-up codes available. • Select Specific to make specific codes available; then select codes from the Available list and click the right arrow to move them to the Selected list. To remove a code, select it in the Selected list and click the left arrow. <p>The default wrap-up code (indicated by the word <i>default</i> in parentheses appended to the code name) must be included in the Selected Codes list. The default code is used when the agent's profile specifies Auto Wrap Up. Such agents do not enter wrap-up codes.</p>

Setting	Description
Idle Codes	<p>Specify which Idle codes will be available in the drop-down list on the Agent Desktop:</p> <ul style="list-style-type: none"> • Select All to make all idle codes available. • Select Specific to make specific codes available; then select codes from the Available list and click the right arrow to move them to the Selected list. To remove a code, select it in the Selected list and click the left arrow. <p>The default idle code (indicated by the word <i>default</i> in parentheses appended to the code name) must be included in the Selected list. The default code is used:</p> <ul style="list-style-type: none"> • When the agent initially logs in. • After the agent makes an outdial call if the agent's profile specifies Auto Wrap Up.

Collaboration Settings

The Collaboration tab of the Agent Profile page displays the settings described in the following table.

Setting	Description
Entry Point/Queue Transfer Targets	<p>Specify which entry points and queues will be available for selection in the Queue drop-down list on the Agent Desktop:</p> <ul style="list-style-type: none"> • Select All to make all entry points and queues available. • Select Specific to make specific entry points and queues available; then select entry points and queues from the Available list and click the right arrow to move them to the Selected list. • Select None if you do not want to make any entry points or queues available as transfer targets.
Buddy Teams	<p>Specify the teams whose agents will be available for selection in the Agent drop-down list on the Agent Desktop. These are the agents that an agent with this profile will be able to consult with, conference with, and transfer calls to.</p> <ul style="list-style-type: none"> • Select All to make the agents on all teams available. • Select Specific to make agents on specific teams available; then select teams from the Available Teams list and click the right arrow to move them to the Selected Teams list. • Select None if you do not want to make any teams available for consultation, conference, or call transfer.

Setting	Description
Consult To Queue	<p>Specify Yes if you want the agent to be able to select a queue in the Queue drop-down as a target for a consultation. The target must be an inbound CC-One queue.</p> <ul style="list-style-type: none"> • If the agent selects a proxy queue or an entry point as the target, the Consult button  is disabled. • Consult to queue is supported only for queues that have teams serving them. If the agent attempts to consult to a queue that only redirects to another entry point or queue, a <i>Consult Failed</i> message is displayed.

Dial Plan Settings

The Dial Plans tab of the Agent Profile page displays the following settings

Setting	Description
Outdial Enabled	<p>If you want the agent to be able to make outdial calls, select Yes. If you do not want the agent to make outdial calls, select No—this setting prevents the Call Out field from appearing on the Agent Desktop.</p> <p>Note: In order for the Call Out field to be displayed, your service must be set up for Outdial.</p>
Outdial Entry Points	<p>If you selected Yes in the above field, select the outdial entry point that the agent will use to make outdial calls.</p>
Address Book	<p>Select the address book that includes speed numbers you want the agent to be able to select to make outdial and consult calls.</p> <p>If <i>Outdial</i> is disabled (see the previous setting) and you select an address book, the agent will be able select a name from the address book for consults and transfers, but will not be able to make outdial calls.</p> <p>Select None if you do not want to make an address book available to the agent.</p> <p>See “Creating, Editing, and Deleting Address Books and Address Book Entries” on page 336 for more information.</p>

Setting	Description
Ad-hoc Dial Plan Enabled	<p>If you want the agent to be able to make ad-hoc outdial calls, select Yes and then select the dial plans that will determine which inputs the system will accept in the Call Out field. Two system-supplied dial plans are available and others may have been created for your enterprise.</p> <ul style="list-style-type: none"> • US accepts input text such as the following: 18005551234 1-800-555-1234 1 (800) 555-1234 • Any Format accepts any sequence of alphanumeric characters, hyphens, parentheses, and spaces, plus nonsequential underscores and periods. The input cannot begin with an underscore or period; hyphens, spaces, and parentheses are stripped, but periods and underscores are not. This format can be used for any phone number as well as for the first part of an e-mail address or SIP URI. For example: 123 5551234 555-1234 1-800-FLOWERS (800) 555-1234 John.Smith <p>If you specify No, the agent will not be able to make ad-hoc outdial calls. However, if <i>Outdial</i> is enabled, the agent will be able to make an outdial call—but only by either selecting an entry from the address book or typing a name from the address book in the Call Out field.</p>
Outdial ANI List	<p>This setting appears only if Outdial Enabled is set to Yes. Optionally, select the list of phone numbers that the agent can select before making an outdial call. The selected number is sent as the caller ID to the recipient of the call (see “Outdial ANI” on page 339 for more information).</p>

Agent DN Validation Settings

The Agent DN Validation tab of the Agent Profile page displays the following setting.

Setting	Description
Validation for Agent DN	<p>To allow the agent to use any DN to log in to the Agent Desktop, leave this field set to Unrestricted.</p> <p>To restrict the DN the agent can enter, select one of the following buttons:</p> <ul style="list-style-type: none"> • Provisioned Value restricts the login DN to the default value provisioned for the agent. Note that if no default DN value is provisioned, the agent will be able to enter any DN value. • Validation Criteria restricts the login DN to the format specified in the Selected list. After selecting this button, select a format from the Available list and click the right arrow to move it to the Selected list. <p>For a description of the US and Any Format validation criteria, see the entry for Ad-hoc Dial Plan Enabled in the previous section.</p>

Agent Viewable Statistics Settings

The Agent Viewable Statistics tab of the Agent Profile page displays the following settings.

Setting	Description
Agent Statistics	<p>Select Yes or No to specify whether or not you want the agent to be able to display the Agent Personal Statistics window by clicking a button on the Agent Desktop.</p> <p>See “Viewing Statistics” on page 400 for more information.</p>
Queue Statistics	<p>This setting controls whether or not the agent can display statistics for all or some queues in the Agent Personal Statistics window.</p> <ul style="list-style-type: none"> • To enable the agent to display statistics for all queues, select the All button. • To enable the agent to display statistics for specific queues, select the Specific button; then select queues from the Available Queues list and click the right arrow to move them to the Selected Queues list. • To prevent the agent from displaying queue statistics, select the None button.
Logged-in Team Statistics	<p>Select Yes or No to specify whether or not the agent can view statistics for the team that the agent is logged in to.</p> <p>Note: This setting and the following setting are independent of each other.</p>

Setting	Description
Team Statistics	<p>Do one of the following:</p> <ul style="list-style-type: none"> To enable the agent to display statistics for all teams, select the All button. To enable the agent to display statistics for specific teams, select the Specific button; then select teams from the Available Teams list and click the right arrow to move them to the Selected Teams list. To enable the agent to display statistics only for the team that the agent is logged in to, select the Specific button and leave the Selected Teams list empty, and select Yes in the Logged-in Team Statistics field. To prevent the agent from displaying team statistics, select the None button in this field and select No in the Logged-in Team Statistics field.
Access To Recordings	This setting appears only if your enterprise uses the Agent Access to Recordings feature. Select Yes or No to specify whether or not the agent can access recordings of calls handled in the last 24 hours.
Access to Seatmap	This setting appears only if the Seatmap module is enabled for your enterprise. Select Yes or No to specify whether or not the agent will be able to access the Seatmap window by clicking a button on the Agent Desktop.

Agent Threshold Settings

The Agent Thresholds tab of the Agent Profile page appears only if your enterprise uses the Threshold Alerts feature. This tab provides settings for specifying which, if any, agent-viewable alerts the agent can display in the Agent Personal Statistics window and in the Seatmap window.

If your enterprise uses the Agent Threshold Alerts feature, the tab also provides settings for specifying which, if any, agent thresholds are associated with the agent.

To enable display of the Agent Personal Statistics window, you must also set *Agent Statistics* to *Yes* in the *Agent Viewable Statistics* tab, and to enable the agent to access the Seatmap window, you must set *Access to Seatmap* to *Yes* in the tab (see the previous topic, “[Agent Viewable Statistics Settings](#)”).

See “[Threshold Rules](#)” on page 326 for more information.

Setting	Description
Agent Viewable Threshold Alerts	<p>If agent-viewable threshold alerts are available, specify the alerts you want the agent to receive by selecting rules in the Available Threshold Rules list and clicking the right arrow to move them to the Selected Threshold Rules list.</p> <p>When a selected threshold rule is breached, an alert is generated and displayed in the Threshold Alerts tab of the Agent Personal Statistics window.</p>
Enable Agent Threshold Alerts	<p>This setting appears only if your enterprise uses the Agent Threshold Alerts feature.</p> <p>Select Yes or No to specify whether or not you want the agent and the agent's supervisor to receive alerts when the agent breaches specified threshold rules.</p> <p>If you selected Yes and agent-viewable agent threshold alerts are available, specify the alerts you want the agent and supervisor to receive by selecting rules from the Available Agent Threshold Rules list and clicking the right arrow to move them to the Selected Agent Threshold Rules list.</p> <p>If the agent breaches a selected rule, an alert is generated and displayed in the Agent Threshold Alerts tab of the Agent Personal Statistics window as well on the supervisor's CC-One Management Portal and in the Seatmap window.</p>

Agent Accounts

The Agents pages in the Provisioning module provide an interface for adding agents to the system and assigning them to the agent-based teams that they will support. After an agent has been added, you can make real-time changes to that agent's settings—for example, reassigning teams; locking, unlocking, deleting and activating agent accounts; and changing password information.

Topics covered in this section:

- [Adding an Agent](#)
- [Performing an Agent Bulk Upload](#)
- [Viewing Agent Settings](#)
- [Editing an Agent's Settings](#)
- [Unlocking a Locked Agent Account](#)
- [Deleting and Activating Agent Accounts](#)
- [Deleting Multiple Agent Accounts Simultaneously](#)
- [Agent Skill Report](#)

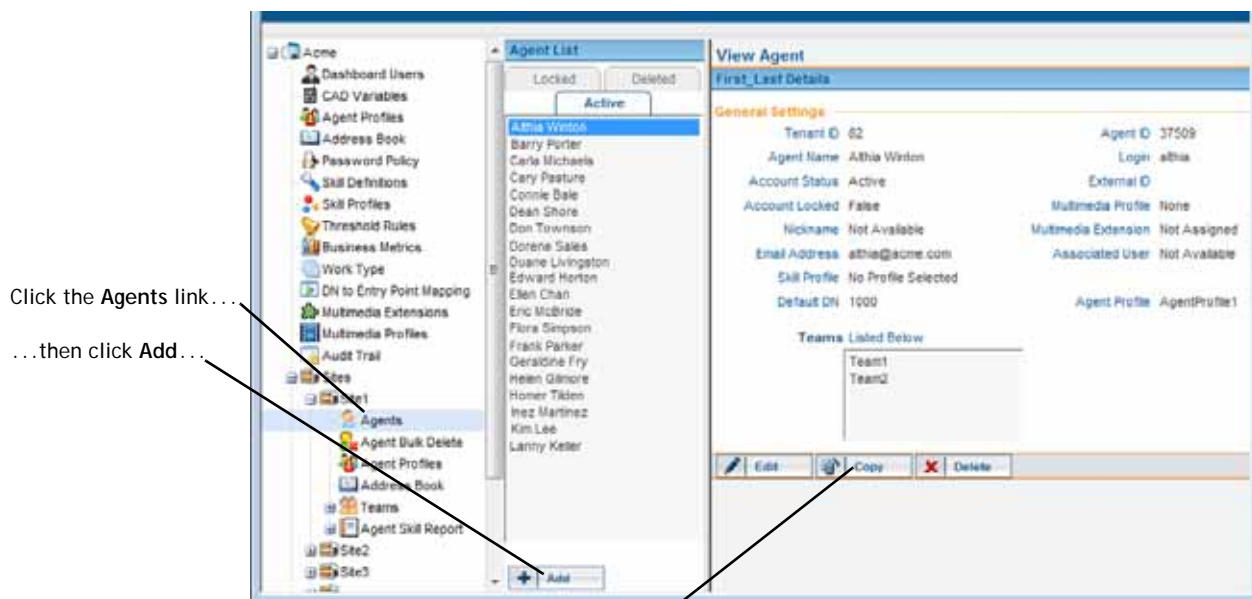
Adding an Agent

Before attempting to add an agent, make sure that an appropriate agent profile is available for assigning to the agent (see “Agent Profiles” on page 342).

To add a new agent:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, expand the site list by clicking the plus sign (+) next to the name of the site to which you want to add agents, and then click the **Agents** link.

Agent details for the first agent in the Agent list are displayed.

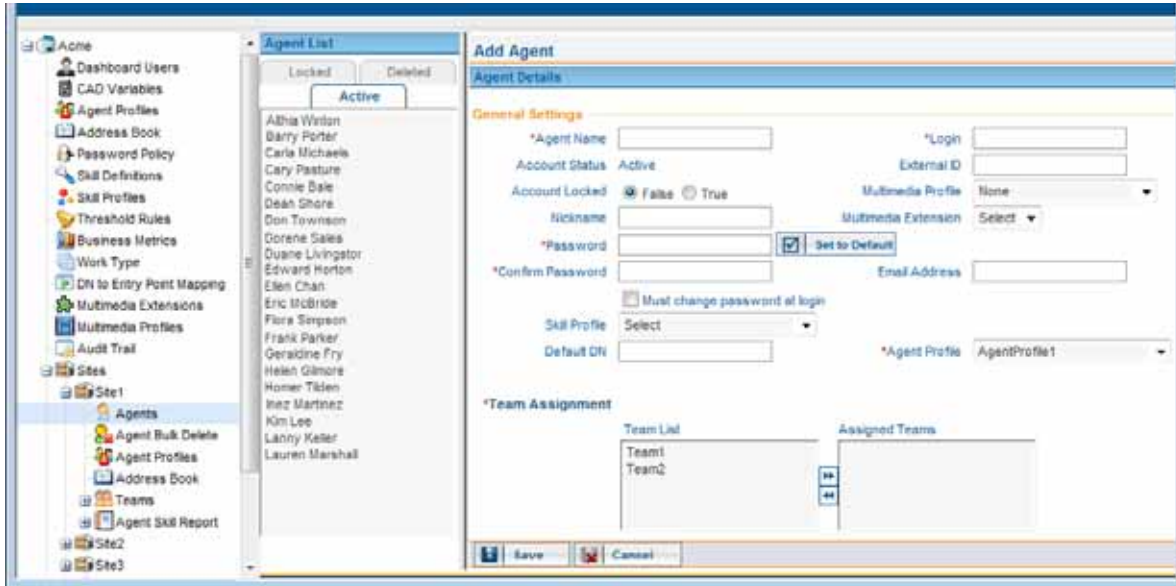


Click the Agents link...

...then click Add...

... or click **Copy** on the View Agent page for the agent selected in the Agent List.

3. Click **Add** at the bottom of the **Agent List** panel to display the Add Agents panel on the right.
- OR -
To copy the settings for an existing agent, select an agent listed in the middle panel, and then click **Copy** at the bottom of the View Agent page in right panel.
4. Specify settings for the agent as described in the following table, and then click **Save**.



Setting	Description
Agent Name	Enter the name of the agent.
Login	Specify the user name the agent will use to log in to the Agent Desktop. A login name can include uppercase and lowercase letters (A-Z, a-z), numbers (0-9), the at-sign (@), and the following nonconsecutive special characters: hyphen (-), underscore (_), and period (.). Note: You cannot edit this setting after you click Save.
Account Status	This read-only field is set to Active when you add an agent.
External ID	Optionally, enter another means of identifying the agent, such as an employee number.
Account Locked	This is a read-only field unless your role includes the AllowAccountUnlock permission. For a new user, this field is set to False . The system automatically changes this setting to True if the agent enters an incorrect password more than a specified number of times in succession, thus preventing future attempts to log in (see “Unlocking a Locked Agent Account” on page 359).
Multimedia Profile	If Multimedia is enabled for your enterprise, you can optionally select a multimedia profile for this agent. This profile overrides the multimedia profile associated with the team that the agent is logged in to (see “Multimedia Profiles” on page 307).
Nickname	If Multimedia Extensions are enabled for your enterprise, you can optionally enter an alternative name for the agent.

Setting	Description
Multimedia Extension	<p>If Multimedia Extensions are enabled for your enterprise, you can optionally select a multimedia extension for this agent. The list of multimedia extensions is populated based on the multimedia profile assigned to the agent.</p> <p>This multimedia extension overrides the multimedia extension assigned at the site level (see “Multimedia Extensions” on page 310).</p>
Password	<p>Enter a password for the agent or click the Set to Default button to specify the default password that is defined for your enterprise. Minimum and maximum length and allowable characters are based on the password policy specified in the agent profile assigned to the agent (see “Password Policy” on page 341).</p>
Confirm Password	<p>Re-enter the agent’s password.</p>
Must change password at login	<p>Select True or False to specify whether or not the user will be required to create a new password when logging in with this password for the first time.</p>
Email Address	<p>If your enterprise uses the Agent Password Reset feature, enter the agent’s email address. This address will be used for validation along with the agent’s login name and enterprise if the agent forgets the password and submits a password reset request. If the data is validated, a new password will be generated and sent to this email address.</p>
Skill Profile	<p>If your enterprise uses the optional Skills-Based Routing feature, you can optionally select a skill profile for this agent. This profile overrides any skill profile at the team level associated with the agent (see “Skill Profiles” on page 319).</p>
Default DN	<p>Optionally, enter the dial number associated with the agent.</p>
Agent Profile	<p>Select an agent profile from the list of profiles that have been created for your enterprise (see “Agent Profiles” on page 342).</p> <p>Note that although an agent can belong to several teams, the agent profile for that agent does not change.</p>
Team Assignment	<p>To assign an agent to one or more teams, select the teams from the Team List and click the right arrow to move them to the Assigned Teams list.</p>

Performing an Agent Bulk Upload

Rather than adding agents individually, you can upload provisioning information for multiple agents from a .csv file to the CC-One provisioning system as described in the following procedures:

- [Creating the .csv File](#)
- [Uploading the Agent Data](#)

Creating the .csv File

To access a .csv file to use as a template:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click plus sign (+) next to the **Template** link, and then click **Agent Upload Template**.

Click here to access a .csv file to use as a template.



3. In the dialog box that opens, specify whether to open or save the file.

The Agent Bulk Upload template contains the columns described in the following table. After you enter the relevant information for each agent you want to add, and then save the .csv file to your system, you can upload the data to the database as described in the next section, [“Uploading the Agent Data.”](#)

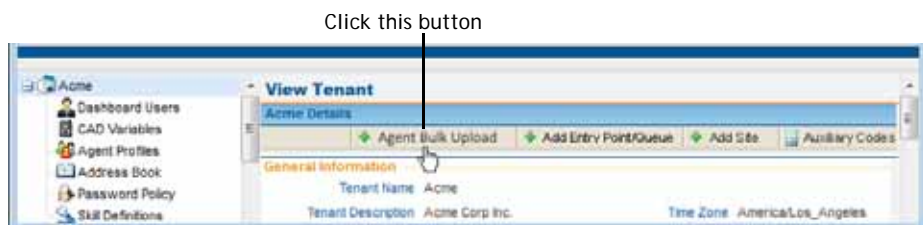
Column	Description
AGENT_NAME	Enter the agent's name.
EXTERNAL_ID	Enter any numerical value.

Column	Description
DEFAULT_DN	Enter a numerical value representing the extension number associated with the agent.
ACCOUNT_STATUS	Enter 0 (inactive) or 1 (active).
PASSWORD	Enter a password for the agent.
LOGIN	Enter the agent's login name.
TEAM_NAME	Enter the name of the team or teams to which the agent belongs. When specifying multiple teams, enter them in this format: <i>team1/team2/team3/...</i> (using a '/' to separate the team names).
SITE_NAME	Enter the site name.
TENANT_NAME	Enter your enterprise name.
AGENT_PROFILE	Enter the name of an agent profile.
SKILL_PROFILE_NAME	Enter the name of a skill profile (available only if your enterprise uses the optional skills-based routing feature).
EMAIL_ID	Enter the agent's email address.
MEDIA_PROFILE_NAME	Enter the name of a multimedia profile (available only if Multimedia is enabled for your enterprise).
MULTIMEDIA_EXTENSION	Enter the name of a multimedia extension (available only if Multimedia Extensions are enabled for your enterprise).
NICK_NAME	Enter an alternative name for the agent (available only if Multimedia Extensions are enabled for your enterprise).

Uploading the Agent Data

To upload the agent data:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. Click the **Agent Bulk Upload** button beneath the page title bar.



3. In the **Agent Bulk Upload** dialog box that opens, specify the appropriate settings as described in the following table, and then click **Upload**.

Agent Bulk Upload

These default values will override the ones specified in the CSV file.

Default Tenant: Acme

Default Site: None

Default Team Name: None

Default Skill Profile: None

Default Multimedia Profile: None

Auto-generate Login: YES NO

Auto-generate Password: YES NO

Account Status: Active Suspend None

Default Agent Profile: None

Default Multimedia Extension: None

Upload File: No file selected.

Notes:

1. The auto-generate login will trim the login name to the first 8 characters of the agent name
2. The auto-generate password will set agent name as password
3. Multiple teams can be added through the CSV file by entering teams separated by \#. For example: team1#team2#team3

Note: Values entered here will override values in the .csv file.

Field	Description
Default Tenant	This read-only field displays the name of your enterprise.
Default Site	Select a site associated with the agents or None to use the values in the .csv file.
Default Team Name	Select a team associated with the agents or None to use the values in the .csv file.
Default Skill Profile	Select a skill profile that you want assigned to the agents or None to use the values in the .csv file.
Default Multimedia Profile	If Multimedia is enabled for your enterprise, select the multimedia profile that you want to assign to the agents or None to either use the profile assigned to the team that the agents are logged in to or to use the values in the .csv file.
Auto-generate Login	Select Yes if you want the system to automatically generate login names for the agents (using the first 8 characters of the agent's name). Select No to use the values in the .csv file.
Auto-generate Password	Select Yes if you want the system to automatically generate passwords for the agents (using the first 8 characters of the agent's name). Select No to use the values in the .csv file. Note: The password policy specified in the agent profile does not apply to agent bulk upload.
Account Status	Specify the account status: <ul style="list-style-type: none"> • Active. The agents will be active in the system after the data is uploaded. • Suspend. The agents will be inactive until manually activated. • None. The values in the .csv file will be used.

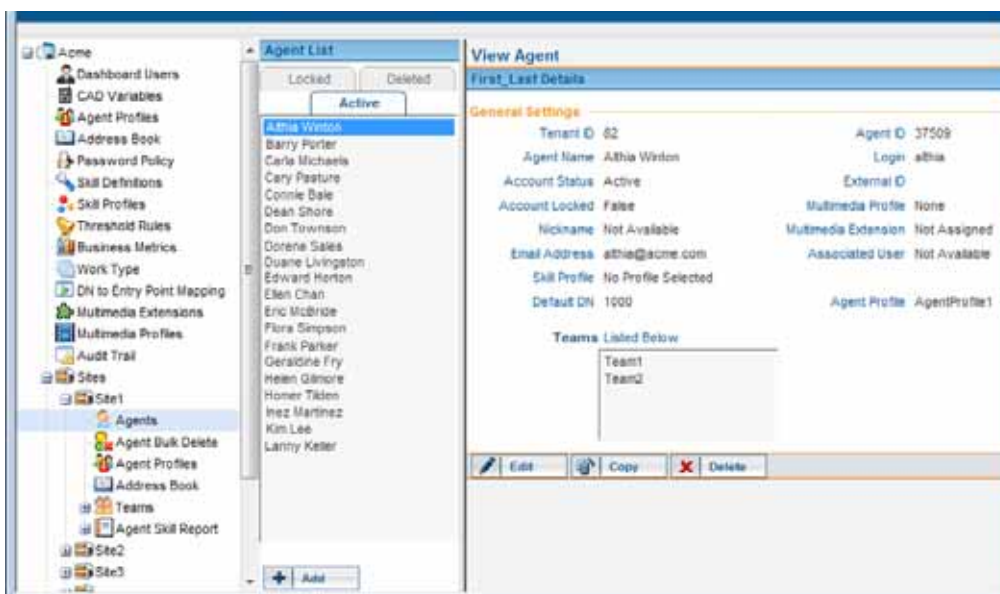
Field	Description
Default Agent Profile	Select an agent profile or None to use the values in the .csv file.
Default Multimedia Extension	Select a multimedia extension or None to use the values in the .csv file.
Upload File	Specify the path to the .csv file to be uploaded (or click Browse to navigate to the file).

Viewing Agent Settings

To view the settings for an agent:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, expand the site list by clicking the plus sign (+) next to the name of the site you are interested in, and then click the **Agents** link.

The Agent List panel appears. Agent details for the first agent in the list are displayed in the View Agent panel on the right.



3. Click the tab that you are interested in (**Active**, **Deleted**, or **Locked**) and then click the name of the agent. The agent settings are displayed in the View Agent panel. For a description of each setting, see the table on [page 353](#).

Editing an Agent's Settings

To edit an agent's settings:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, expand the site list by clicking the plus sign (+) next to the name of the site you are interested in, and then click the **Agents** link.
3. Select the name of an agent in the **Active** or **Locked** tab.
4. When the settings for the selected agent are displayed in the View Agent panel, click **Edit** at the bottom of the panel. The Edit Agent panel is displayed.
5. In the **Edit Agent** panel, make changes, and then click **Save**. For a description of each setting, see the table on [page 353](#).

Unlocking a Locked Agent Account

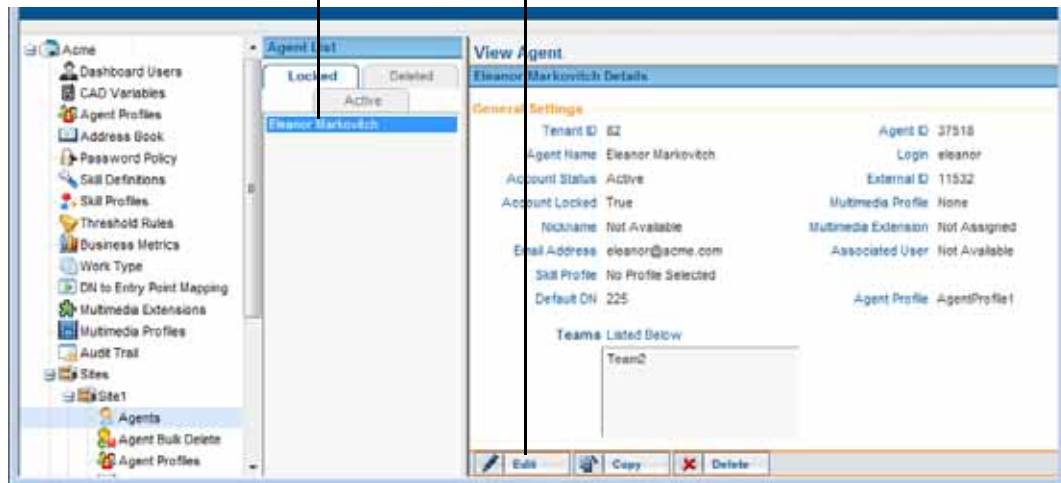
The system automatically locks an agent account if the agent enters an incorrect password more than a specified number of times in succession, thus preventing future attempts to log in. The maximum number of allowable invalid login attempts is determined by the password policy assigned to the agent (see “[Password Policy](#)” on [page 341](#)).

A locked agent account can be unlocked only by a user whose role includes the AllowAccountUnlock permission.

To unlock a locked agent account:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, expand the site list by clicking the plus sign (+) next to the name of the site you are interested in, and then click the **Agents** link.
3. Click the **Locked** tab, and then click the name of the locked agent.
4. When the settings for the selected agent are displayed in the View Agent panel, click **Edit** at the bottom of the panel.

Select the name of the locked agent then click Edit.



5. In the **Edit Agent** panel that appears, change the **Account Locked** setting from **True** to **False**.
6. Click **Save**. A dialog box appears, asking if you want to force password change on login. Click **OK** if you want to force the agent to change the password; otherwise, click **Cancel**.

The system saves your settings and moves the agent account to the Active tab.

Deleting and Activating Agent Accounts

When you delete an agent account, it is moved from the Active tab to the Deleted tab, where it can be activated later. The deleted agent account is permanently removed from the system after 100 days, and then it can no longer be activated.

You cannot delete an agent account if the agent is included in a recording or monitoring schedule.

To delete an agent account:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, expand the site list by clicking the plus sign (+) next to the name of the site you are interested in, and then click the **Agents** link.

The Agent List panel appears. Agent details for the first agent in the list are displayed in the View Agent panel on the right.

3. Select an agent listed in either the **Active** tab or the **Locked** tab.

- When the settings for the selected agent appear in the View Agent panel, click **Delete**, and then, in the confirmation dialog box, click **OK**.

The agent name appears in the Deleted tab.

To activate a deleted agent account:

- Click the **Deleted** tab, and then click the name of the agent.
- When the settings for the agent appear in the View Agent panel, click **Activate**, and then, in the confirmation dialog box, click **OK**.

The agent name appears in the Active tab.

Deleting Multiple Agent Accounts Simultaneously

To delete multiple agent accounts simultaneously:

- Click the **Provisioning** link on the CC-One Management Portal.
- In the selection panel on the left side of the page, expand the site list by clicking the plus sign (+) next to the name of the site you are interested in, and then click the **Agent Bulk Delete** link.

The Agent Bulk Delete page appears.

- In the **Active Agents** list, select the names of the agents you want to delete and click the right arrow to move them to the **Agents to Be Deleted** list.
- Click the **Delete** button beneath the list of agents. Then, in the confirmation dialog box, click **OK**.

Click to delete the selected agent accounts.

Previously submitted bulk delete jobs are listed here.

5. The following message appears at the top of the panel: “Created bulk delete task successfully. Click here to see task details.” Click in the message to populate the Agent Bulk Delete Task List with the submitted delete job, and then click the corresponding task ID List to populate the Agent Bulk Delete Status List.

The Agent Bulk Delete Status List displays the details about each agent you attempted to delete, including whether the deletion was successful, and if a deletion failed, the reason for the failure.

Click here to populate the Agent Bulk Delete Task List with the newly submitted delete job...

... and then click the task ID to populate the Agent Bulk Delete Status List.

If a deletion fails, the reason for the failure is provided in the Comments column.

Task ID	Created By	Creation Time
1	Juan	2010-11-03 00:03:21.0
2	Juan	2010-11-03 10:00:43.0
3	Sharon	2010-11-03 03:25:59.0

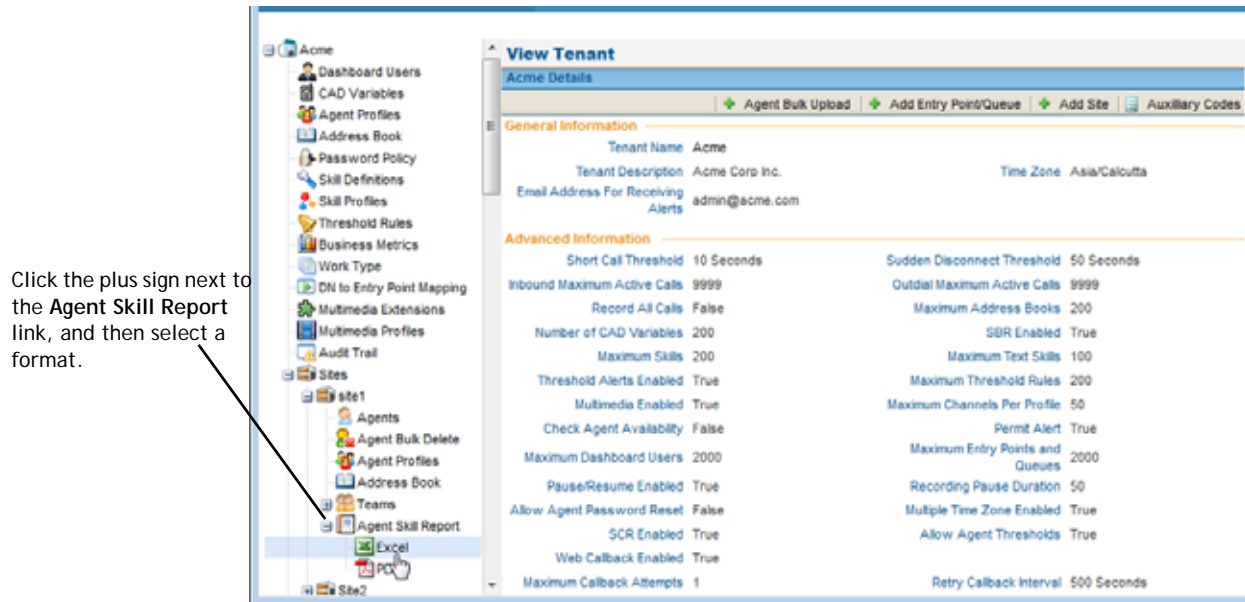
Agent Name	Status	Comments	Status
Alice Adams (11963)	FAILED	Agent is assigned to Skill Profile: 5	2011
Mark Marcos (11962)	DELETED	Agent Account Deleted Successfully	2011
Burtran Morgan (11963)	DELETED	Agent Account Deleted Successfully	2011

Agent Skill Report

If your enterprise uses the optional Skills-Based Routing feature, you can access an Agent Skill report for agents at a specific site. The report lists the skills assigned to each agent at the site along with the agent’s assigned skill profile and teams.

To access an Agent Skill report:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page:
 - a. Expand the site list by clicking the plus sign (+) next the **Sites** link, and then click the plus sign next to the name of the site you are interested in.
 - b. Click the plus sign next to the **Agent Skill Report** link, and then select a format: **Excel** or **PDF**.



3. In the dialog box that opens, either click **Open** to open the file, or click **Save** and, in the dialog box that opens, navigate to the directory where you want to save the file, and then click **Save**.

Call-Associated Data Variables

Topics covered in this section:

- [About Call-Associated Data Variables](#)
- [Defining or Editing a CAD Variable](#)

About Call-Associated Data Variables

Call-associated data (CAD) variables can be defined in the Provisioning module for use in call control scripts to collect one of the following types of data values:

- **Caller-entered digits** collected while the call is in the IVR system, such as an account number.
- **Agent-entered data**, such as a case number or action code.

CAD values are stored in the cumulative call detail records (CCDRs) that Management Portal users can display and export to Excel or .csv files. Note the following:

- The system will store data for a CAD variable used in a call control script only if the variable name matches the name of a non-deprecated CAD variable provisioned for your enterprise. You can view a list of the CAD variables used in a call control script in the Call Control section of the Create Routing Strategy or Edit Routing Strategy page (see [“Assigning Call Control Scripts and Parameters”](#) beginning on [page 96](#)).
- A CAD value entered by an agent during a call is saved to the database after the agent completes the Wrap-up state for that call. If Agent Desktop connectivity is lost before that point and cannot be recovered, the value entered by the agent will not be saved.
- If a call is transferred to another agent or queue and both agents enter or edit a CAD value, only the CAD value sent by the last wrap-up event is saved to the database. For example, consider the following scenario:
 1. The first agent enters a CAD value, then goes into the Wrap-up state and remains in that state.
 2. The second agent edits the CAD value, completes the Wrap-up state for that call, and becomes available to handle the next call.
 3. The first agent changes the CAD value, then completes the Wrap-up state for that call and becomes available to handle the next call.

In this case, the last value entered by the first agent would be saved to the database.

- For best results, agents who are expected to enter CAD values should not be assigned an agent profile that places them automatically in the Available state after a call (see [“Agent Profiles”](#) beginning on [page 342](#)).

Be aware of the following security considerations:

- Data stored through use of a CAD variable is visible to all individuals who have access to historical records on the Management Portal. Secure data such as credit card numbers, PINs, and social security numbers should *not* be stored through use of CAD variables.
- The CAD data will be preserved subject to network availability and other operation considerations. CAD variables provide reference data only, and are not intended to provide Customer Relationship Management (CRM) functionality.

Defining or Editing a CAD Variable

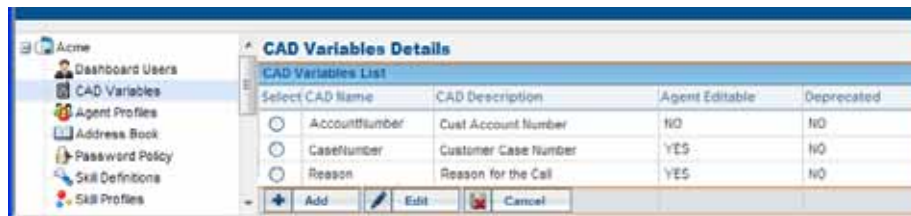
CAD variables cannot be deleted, but they can be deprecated. A deprecated CAD variable cannot be used to store data collected through a control script.

The maximum number of non-deprecated CAD variables that you can define is determined by the *Number of CAD Variables* setting provisioned for your enterprise (see “Tenant Settings” on page 290).

To define or edit a CAD variable:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **CAD Variables** link.

The CAD Variables Details page appears in the right panel.



3. Do one of the following:
 - To define a new variable, click **Add**.
 - To edit or view the settings for a variable, select the button to the left of the variable name, and then click **Edit**.
4. On the page that appears in the right panel, specify the settings for the variable in the available fields as described in the following table, and then click **Save**.

Setting	Description
CAD Name	Enter the CAD variable name. The name can include alphanumeric characters and the following special characters: hyphen (-), underscore (_), and the space character. The name cannot begin with a space and cannot include two or more hyphens, underscores, or spaces in a row. The name cannot be modified after the CAD variable is created.
CAD Description	Enter an optional description of the CAD.
Agent Editable	Select Yes or No to specify whether or not agents will be able to edit the value of the variable from the CC-One Agent Desktop.
Deprecated	Select Yes or No to specify whether or not the variable is deprecated

CC-One Management Portal User Accounts

Management Portal users are typically call center supervisors and managers who are responsible for day-to-day operations. They use the CC-One Management Portal to access the modules that provide them with the real-time visibility and control they need over the resources they are responsible for. Access control is customized for each Portal user through a unique user account. Each user account includes:

- A role, which specifies the Management Portal modules the user can access and the permission level within each module. The same role can be assigned to multiple users.
- A set of agent-related and call-related access privileges, which specify the sites, teams, queues, and entry points the user can access.

Topics covered in this section:

- [Management Portal User Roles](#)
- [Managing CC-One Management Portal User Accounts](#)
- [Adding Multiple Management Portal Users Simultaneously](#)
- [Unlocking a Locked Management Portal User Account](#)

Management Portal User Roles

The following roles are available to all tenants. Other roles may be available at your enterprise.

Role	Accessible Modules	Permissions
Administrator	Real-Time Reports/ Historical Reports	Create, edit, and view reports.
		Log out an agent from the Real-Time Reports module.
		Monitor, acknowledge, and archive threshold alerts.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
		Monitor a call already in progress (midcall monitoring).
		Barge in on a monitored call.
		Coach a monitored agent.
	Routing Strategy	Create, edit, and schedule call-routing and team capacity strategies.
		Upload and update call control scripts.
		Upload and update resource files.
	Provisioning	View tenant settings. View, edit, create, and delete password policies, agent profiles, agent accounts, teams, and threshold rules. Lock and unlock agent accounts. View, edit and create all other provisioned entities except CC-One Management Portal user accounts and DN to entry point mappings.
	Release Notes	View global and tenant-specific release notes.
AdministratorCM	Real-Time Reports/ Historical Reports	Create, edit, and view reports.
		Log out an agent from the Real-Time Reports module.
		Monitor, acknowledge, and archive threshold alerts.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
		Monitor a call already in progress (midcall monitoring).
		Barge in on a monitored call.
		Coach a monitored agent.
	Routing Strategy	Create, edit, and schedule call-routing and team capacity strategies.
		Upload and update call control scripts.
		Upload and update resource files.
	Release Notes	View global and tenant-specific release notes.
	AgentManager	Provisioning
Release Notes		View global and tenant-specific release notes.

Role	Accessible Modules	Permissions
CMandReports	Real-Time Reports/ Historical Reports	View reports.
		Log out an agent from the Real-Time Reports module.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls.
		Barge in on a monitored call.
	Release Notes	View global and tenant-specific release notes.
CMandReportswith Whisper&Mid-Call	Real-Time Reports/ Historical Reports	View reports.
		Log out an agent from the Real-Time Reports module.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
		Monitor a call already in progress (midcall monitoring).
		Barge in on a monitored call.
		Coach a monitored agent.
	Release Notes	View global and tenant-specific release notes.
Guest	Real-Time Reports Historical Reports	View real-time and historical reports.
GuestMonitorCoach	Real-Time Reports/ Historical Reports	Create, edit, and view reports.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
		Coach a monitored agent.
GuestMonitoring	Real-Time Reports/ Historical Reports	Create, edit, and view reports.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
ManageAgentPassword	Password Reset/ Unlock Agent	Reset or reassign passwords for one or more agents and unlock locked agent accounts at specified sites or on specified teams.

Role	Accessible Modules	Permissions
Manager	Real-Time Reports Historical Reports	Create, edit, and view reports.
		Log out an agent from the Real-Time Reports module.
		Monitor, acknowledge, and archive threshold alerts.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
		Monitor a call already in progress (midcall monitoring).
		Barge in on a monitored call.
		Coach a monitored agent.
	Routing Strategy	View call-routing and team capacity strategies.
		View call control scripts.
		View resource files.
	Provisioning	View tenant, entry point, queue, site, and team settings. View, edit, create, and delete password policies, agent profiles, agent accounts, and threshold rules. Lock and unlock agent accounts. View, edit and create all other provisioned entities except CC-One Management Portal user accounts and DN to entry point mappings.
	Release Notes	View global and tenant-specific release notes.
	ManagerCM	Real-Time Reports Historical Reports
Log out an agent from the Real-Time Reports module.		
Monitor, acknowledge, and archive threshold alerts.		
Access historical Monitored Calls report.		
Call Monitoring		Monitor calls; create, edit, and view call monitoring schedules.
		Monitor a call already in progress (midcall monitoring).
		Barge in on a monitored call.
		Coach a monitored agent.
Routing Strategy		View the routing schedules, strategies, and resources.
Provisioning		View tenant, entry point, and queue settings. View, edit, create, and delete password policies, agent profiles and agent accounts.
Release Notes		View global and tenant-specific release notes.

Role	Accessible Modules	Permissions	
ManagerCMandRS	Real-Time Reports Historical Reports	Create, edit, and view reports.	
		Log out an agent from the Real-Time Reports module.	
		Access historical Monitored Calls report.	
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.	
		Monitor a call already in progress (midcall monitoring).	
		Barge in on a monitored call.	
		Coach a monitored agent.	
	Routing Strategy	Create, edit, and schedule call-routing and team capacity strategies.	
		Upload and update call control scripts.	
		Upload and update resource files.	
	Provisioning	View tenant, entry point, and queue settings. View, edit, create, and delete password policies, agent profiles and agent accounts.	
	Release Notes	View global and tenant-specific release notes.	
	ManagerNoRS	Real-Time Reports Historical Reports	Create, edit, and view reports.
			Access historical Monitored Calls report.
Call Monitoring		Monitor calls; create, edit, and view call monitoring schedules.	
		Monitor a call already in progress (midcall monitoring).	
		Barge in on a monitored call.	
		Coach a monitored agent.	
Provisioning		View tenant, entry point, and queue settings. View, edit, create, and delete password policies, agent profiles, agent accounts, and teams. Lock and unlock agent accounts.	
Release Notes		View global and tenant-specific release notes.	

Role	Accessible Modules	Permissions
SuperUser	Real-Time Reports Historical Reports	Create, edit, and view reports.
		Log out an agent from the Real-Time Reports module.
		Monitor, acknowledge, and archive threshold alerts.
		Access historical Monitored Calls report
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
		Monitor a call already in progress (midcall monitoring).
		Barge in on a monitored call.
		Coach a monitored agent.
	Call Recording	Create, view, and edit call recording schedules.
	Routing Strategy	Create, edit, and schedule call-routing and team capacity strategies.
		Upload and update call control scripts.
		Upload and update resource files.
	Provisioning	View tenant settings. View, edit, create, and delete sites, entry points and queues, password policies, agent profiles, agent accounts, teams, threshold rules, and CC-One Management Portal user accounts. Lock and unlock Management Portal user and agent accounts. View, edit and create all other provisioned entities. Access the Audit Trail feature.
	Password Reset/ Unlock Agent	Reset or reassign passwords for one or more agents and unlock locked agent accounts at specified sites or on specified teams.
Release Notes	View global and tenant-specific release notes.	
Usage Metrics Report	View tenant-specific usage metrics.	
Support	Real-Time Reports Historical Reports	View reports.
		Log out an agent from the Real-Time Reports module.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
		Monitor a call already in progress (midcall monitoring).
		Barge in on a monitored call.
		Coach a monitored agent.
	Routing Strategy	View call-routing and team capacity strategies.
	Provisioning	View all provisioned entities except CC-One Management Portal user accounts and DN to entry point mappings.
	Release Notes	View global and tenant-specific release notes.

Role	Accessible Modules	Permissions
SupportCM	Real-Time Reports Historical Reports	View reports.
		Log out an agent from the Real-Time Reports module.
		Monitor, acknowledge, and archive threshold alerts.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
		Monitor a call already in progress (midcall monitoring).
		Barge in on a monitored call. Coach a monitored agent.
Release Notes	View global and tenant-specific release notes.	
SupportExtra	Real-Time Reports Historical Reports	View reports.
		Access historical Monitored Calls report.
	Call Monitoring	Monitor calls; create, edit, and view call monitoring schedules.
	Routing Strategy	View routing schedules and strategies.
	Provisioning	View tenant settings, entry point and queue settings, agent profiles, agent accounts, and teams.
	Release Notes	View global and tenant-specific release notes.

Managing CC-One Management Portal User Accounts

The **Dashboard Users** link provides access to an interface where you can add new Management Portal users, view and edit existing user accounts, search for specific users, and export the Management Portal user information to a data analysis tool. You can also delete user accounts, which removes them permanently from the system, or you can suspend and then activate a user account. A suspended user cannot access CC-One features and modules until the account is activated.



When you create a Management Portal user account, you can simultaneously create an agent account for that user by selecting an agent from a list of all existing agents to use as a template. The new agent will have the same profiles, default DN, external ID, and team assignments as the existing agent you select.

If you have the appropriate user permission, you can unlock a locked user account as described in [“Unlocking a Locked Management Portal User Account” on page 378](#).

Note: If an existing user is given new access rights for a site, entry point, or queue, that user must sign out, and then sign in again in order to leverage the new rights.

To view, add, or edit the settings for a Management Portal user:

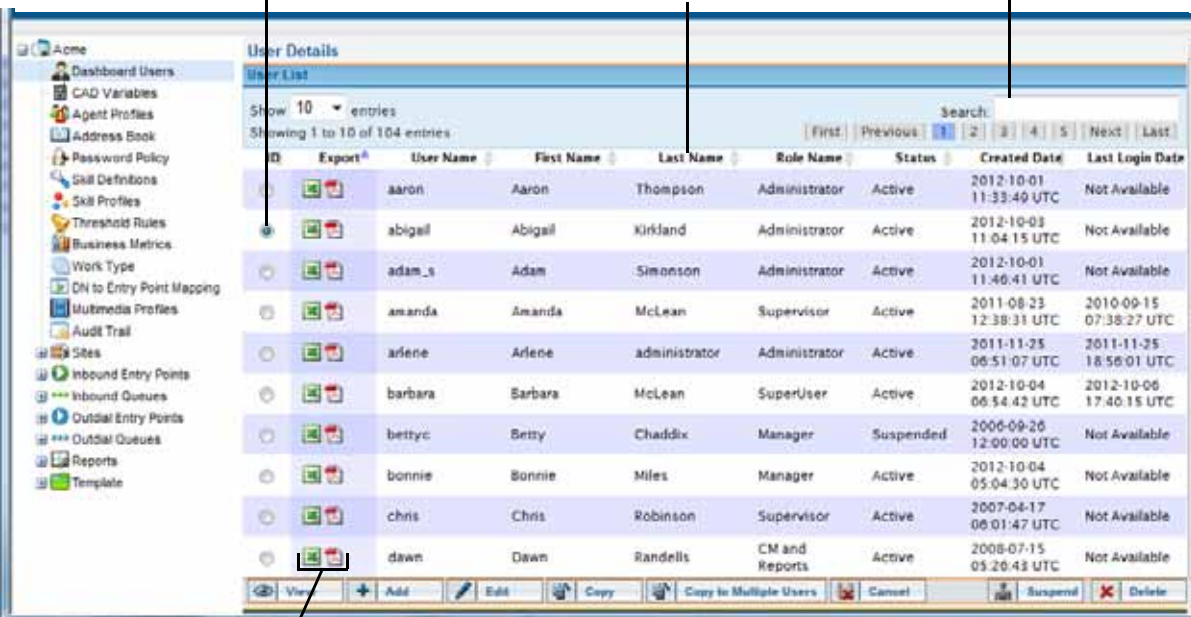
1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Dashboard Users** link.





















3. The User Details page that appears displays settings provisioned for each user along with the user's status, the date and time the user last logged in to the Management Portal, and controls for doing the following:
- To sort the list by any column, click a column header. Click a second time to reverse the sort order.
 - To add a user, click **Add**. To add multiple users simultaneously, see “[Adding Multiple Management Portal Users Simultaneously](#)” on page 376.
 - To view, copy, or edit the settings for a user, select the button to the left of the user name, and then click **View**, **Copy**, or **Edit**.
 - To suspend, reactivate, or delete a user account, select the button to the left of the user name, and then click **Activate**, **Suspend**, or **Delete**. Then, in the confirmation dialog box, click **OK**.
 - To search for a specific user, enter the user's first, last, or user name in the text box on the upper right side of the User Details page.
 - To view or export the settings for all the entry points, queues, sites, and teams assigned to a user as either a Microsoft Excel file or as an Adobe PDF file, click the **Export to Excel**  or **Export to PDF**  icon to the left of the selected user name. In the dialog box that opens, either click **Open** to open the file, or click **Save**, navigate to the directory where you want to save the file, and then click **Save**.

Click a button next to a user name and then click a button at the bottom of the page to view, edit, copy, suspend, or delete the user.

Click a column header to sort the list by that column. Click a second time to reverse the sort order.

To search for a user, enter the first name, last name, or user name here



ID	Export	User Name	First Name	Last Name	Role Name	Status	Created Date	Last Login Date
	 	aaron	Aaron	Thompson	Administrator	Active	2012-10-01 11:33:49 UTC	Not Available
	 	abigail	Abigail	Kirkland	Administrator	Active	2012-10-03 11:04:15 UTC	Not Available
	 	adam_s	Adam	Simonson	Administrator	Active	2012-10-01 11:46:41 UTC	Not Available
	 	amanda	Amanda	McLean	Supervisor	Active	2011-08-23 12:38:31 UTC	2010-09-15 07:38:27 UTC
	 	arlene	Arlene	administrator	Administrator	Active	2011-11-25 06:51:07 UTC	2011-11-25 18:56:01 UTC
	 	barbara	Barbara	McLean	SuperUser	Active	2012-10-04 06:54:42 UTC	2012-10-06 17:40:15 UTC
	 	bettyc	Betty	Chaddix	Manager	Suspended	2006-09-26 12:00:00 UTC	Not Available
	 	bonnie	Bonnie	Miles	Manager	Active	2012-10-04 05:04:30 UTC	Not Available
	 	chris	Chris	Robinson	Supervisor	Active	2007-04-17 06:01:47 UTC	Not Available
	 	dawn	Dawn	Randells	CM and Reports	Active	2008-07-15 05:26:43 UTC	Not Available

To view or export the entities assigned to a user, click one of these icons.

- If you are adding, copying, or editing a Management Portal user account, specify or change the settings for the user on the page that appears in the right panel, and then click **Save**. Each setting is described in the following table.

Setting	Description
General Settings	
Tenant Name	This read-only field displays the name of your enterprise.
Username	Enter the name the user will use to sign in to the CC-One Management Portal. This name will be displayed in the Users List. This field cannot be edited.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
Designation	Optionally enter the user's designation—for example, manager.
Email	Optionally enter the user's email address.
Phone Number	Optionally, enter the user's phone number as a string, without dashes—for example: 4155551212.

Setting	Description
Account Locked	This is a read-only field unless your role includes the AllowAccountUnlock permission. For a new user, this field is set to False . The system automatically changes this setting to True if the agent enters an incorrect password more than a specified number of times in succession, thus preventing future attempts to log in (see “Unlocking a Locked Management Portal User Account” on page 378).
External ID	Optionally enter a numeric external ID for the user, such as an employee number. After you save the settings for a new user, this field becomes read-only and cannot be edited.
Role and Password Settings	
Password	Enter a password for the user. Minimum and maximum length and allowable characters are based on the password policy assigned to the user (see “Password Policy” on page 341).
Confirm Password	Re-enter the password.
Must change password at login	Select True if you want to require the user to create a new password when logging in with this password for the first time.
Role	Select the role you want to assign to the user from the drop-down list (see “Management Portal User Roles” on page 367).
Password Policy	Select the password policy you want to assign to the user or leave the default setting (see “Password Policy” on page 341).
Access Rights	
Allow Complete Access	If you select Yes , all entry points, queues, sites and teams , then the only other visible field in this section is the <i>Agent Associate</i> field. If you select No , specific points, queues, sites, and teams , then additional fields are visible.
Entry Point and Queue Access	Do one of the following: <ul style="list-style-type: none"> • Select Yes, all entry points and queues listed below. OR <ul style="list-style-type: none"> • Select No, specific entry points and queues that are selected below and then select the entry points and queues to which you want the user to have access in the Available Entry Points and Queues list and click the right arrow to move them to the Selected Entry Points and Queues list.

Setting	Description
Site Access	Do one of the following: <ul style="list-style-type: none"> Select Yes, all sites listed below OR <ul style="list-style-type: none"> Select No, specific sites that are selected below and then select the sites to which you want the user to have access in the Available Sites list and click the right arrow to move them to the Selected Sites list.
Team Access	Do one of the following: <ul style="list-style-type: none"> Select Yes, all teams of the sites selected above OR <ul style="list-style-type: none"> Select No, specific teams that are selected below, and then select the teams to which you want the user to have access in the Available Teams list and click the right arrow to move them to the Selected Teams list.
Agent Creation	
Create Agent As	To create an agent for the Management Portal user, select an existing agent name from the drop-down list to use as a template. After you click Save , a new agent will be created with the same agent, multimedia, and skill profiles, default DN, external ID, and team assignments as the selected agent, along with the following settings: <ul style="list-style-type: none"> Agent Name will be the Management Portal user's <i>First Name</i> and <i>Last Name</i> separated by an underscore; for example, Jane_Smith. Login will be the Management Portal user's <i>Username</i> followed by an underscore and a numeric value assigned by the system; for example, janesmith_5940.

Adding Multiple Management Portal Users Simultaneously

Rather than adding Management Portal user accounts individually, you can copy the settings of an existing user to multiple users by simply selecting the user on the User Details page, clicking a button, and uploading a .csv file containing the names and personal information for each new user.

To add multiple Management Portal users simultaneously:

1. Create a .csv file consisting of new-line separated entries. Each line must include a comma-separated user name, first name, last name, email ID, phone number, external ID. For example:

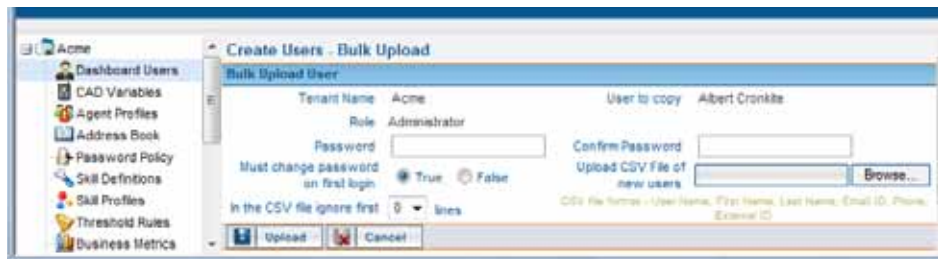
```
eleanor,Eleanor,Falkner,eleanor@acme.com,5551234,942449763
jason,Jason,Lee,jason@acme.com,5553456,8989877
dorian,Dorian,Walker,dorian@acme.com,5557899,59882087
```


2. Save the .csv file to your system.
3. In the Provisioning module, click the **Dashboard Users** link in the selection panel, and on the User Details page that appears in the right panel, select the button next to the name of the user whose settings you want to copy, and then click the **Copy to Multiple Users** button.

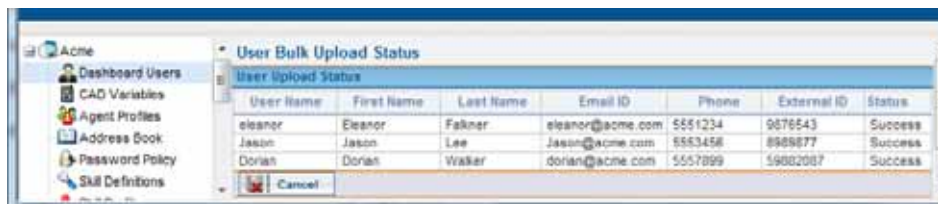
Click the button next to the name of the user ... and then click **Copy to Multiple Users**.
whose settings you want to copy...



4. On the Create Users–Bulk Upload page:
 - a. Enter and confirm a password.
 - b. Specify whether or not users must change the password on first login.
 - c. If you want the first 1, 2, 3, or 4 lines in the .csv file to be ignored, select a number from the drop-down list.
 - d. In the **Upload CSV File of new users** field, click the **Browse** button, then navigate to the .csv file and select it.
 - e. Click **Upload**.




5. The User Bulk Upload Status page appears. Click **Cancel** to return to the User Details page.



Unlocking a Locked Management Portal User Account

The system automatically locks a Management Portal user account if the user enters an incorrect password more than a specified number of times in succession, thus preventing future attempts to log in. The maximum number of allowable invalid login attempts is determined by the password policy assigned to the user (see “[Password Policy](#)” on page 341).

When a user account is locked, the Lock  icon appears to the left of the user's name in the User Details page. A locked user account can be unlocked only by a user whose role includes the AllowAccountUnlock permission.

To unlock a locked Management Portal user account:

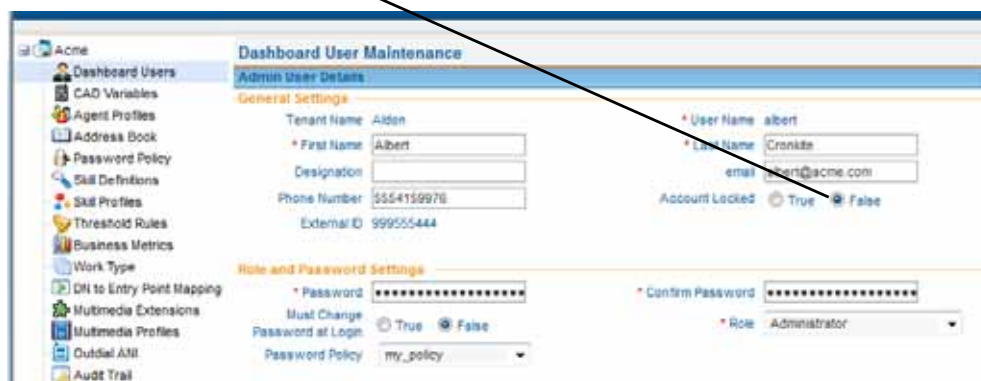
1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel, click the **Dashboard Users** link.
3. On the User Details page that appears, click the button to the left of the locked user's name, and then click **Edit**.

Click the button next to the name of the locked user... and then click Edit.



4. On the page that appears in the right panel, change the **Account Locked** setting from **True** to **False**, and then click **Save** to save your change.

Change this setting from True to False.



5. A message asks if you want to force password change on next login. Click **OK** if you want to force the user to change the password; otherwise, click **Cancel**.

Your changes are saved and the user's account is no longer locked.

Provisioned Items Reports

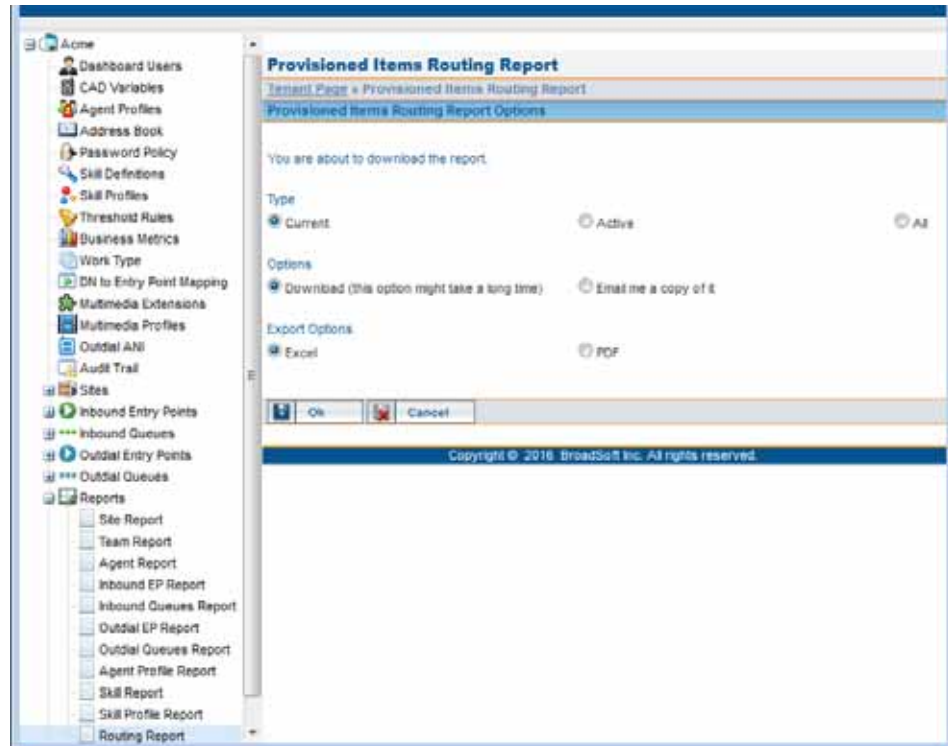
The **Reports** link in the selection panel of the Provisioning module gives you access to provisioned items reports in either Microsoft Excel or Adobe PDF format. These reports provide details about the settings configured for the following active resources provisioned for your enterprise: sites, teams, agents, inbound entry points, inbound queues, outdial entry points, outdial queues, agent profiles, and, if your enterprise uses the optional Skills-Based Routing feature, skills and skill profiles.

In addition, a Routing report is available that maps entry points, queues, and teams to the entities from which contacts are being received or to which contacts are being routed.

To access a report that lists the skill profile and skills assigned to each agent at a specific site, see [“Agent Skill Report” on page 362](#).

To access a Provisioned Items report:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel, click the plus sign (+) next to the **Reports** link and then select the report you are interested in.
3. On the page that appears:
 - If you selected **Routing Report**, specify whether you want the report to include mapping for **All** routing strategies that are mapped to entities to which you have access, or for **Current** routing strategies only, or for **Active** routing strategies only.
 - Specify an export option (**Excel** or **PDF**) and whether to continue downloading the report or have it emailed to you.



4. In the dialog box that opens, either click **Open** to open the file, or click **Save** and, in the dialog box that opens, navigate to the directory where you want to save the file, and then click **Save**.

Audit Trail


The Audit Trail page provides an interface where authorized users can view details about the changes made to the provisioning database tables for your enterprise anytime during the past two weeks and export the data to a data analysis tool such as Microsoft Excel.

To display an audit trail report:

1. Click the **Provisioning** link on the CC-One Management Portal.
2. In the selection panel on the left side of the page, click the **Audit Trail** link.

The Audit Trail Summary page appears in the right panel. It displays the number of times an action was performed in one of the following modules during the most recent 24 hours.

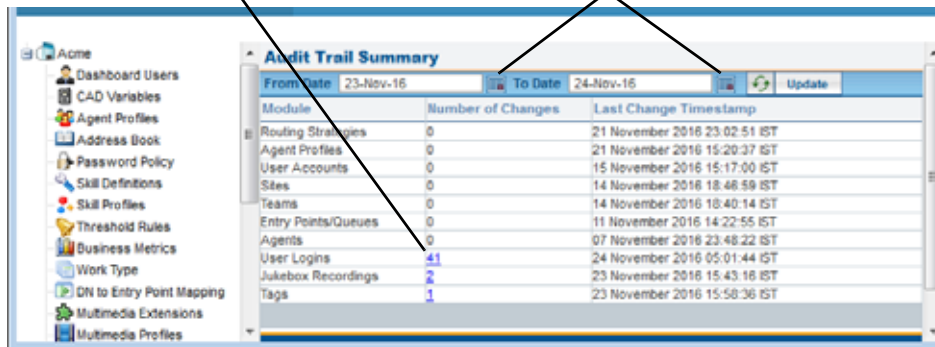
Module	Type of actions
Routing Strategies	Changes made to routing strategies.
Agent Profiles	Changes made to agent profiles.
User Accounts	Changes made to Management Portal user accounts.
Sites	Changes made to sites.
Teams	Changes made to teams.
Entry Points/Queues	Changes made to entry points and queues.
Agents	Changes made to agent accounts
User Logins	Each Management Portal user log in, log out, and session expired event.
Jukebox Recordings	Each Jukebox recording play event.
Tags	Changes made to Jukebox tags.

- To specify a different date range, click a calendar icon , then select a different **From Date** and **To Date**, and then click **Update**.

Note that the system will allow you to specify a data range that extends beyond two weeks, even though audit trail data is stored for only two weeks.

Click a number in this column to display details.

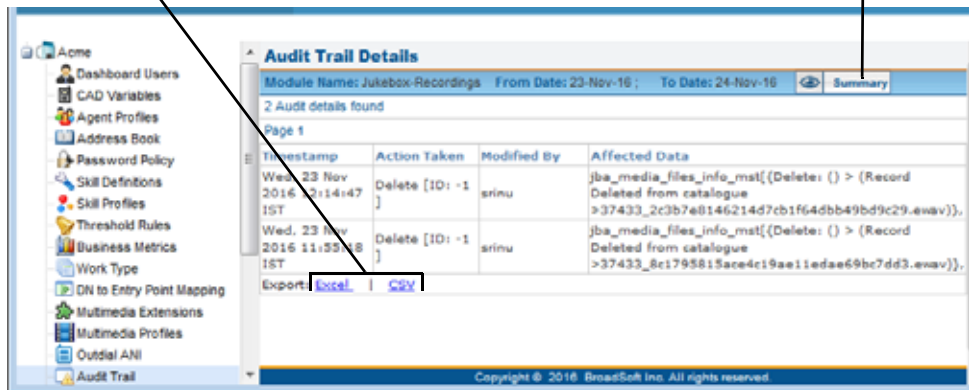
These icons open calendars where you can change the date range.



- To view details about changes made in a module, click a link in the **Number of Changes** column to display the Audit Trail Details page.
- The Audit Trail Details page displays the columns described in the following table. Click the **Summary** button to redisplay the Audit Trail Summary page.

Click one of these links to export the data.

Click this button to redisplay the Audit Trail Summary page.



Column	Description
Timestamp	The date and time of the action.
Action Taken	A description of the action.
Modified By	The name of the Management Portal user who performed the action or BroadSoft if the action was performed by BroadSoft Operations.
Affected Data	Details about the data affected by the action.

- To export the data to a data analysis tool such as Microsoft Excel, click one of the **Export** links displayed at the bottom of the page.

... 10 CC-One Agent Desktop

The CC-One Agent Desktop is presented to agents one of two ways:

- Agents who handle only voice contacts see the CC-One Agent Desktop as a stand-alone application in a separate window.
- Agents who handle contacts for one or more media types in addition to voice see the ICX Desktop after logging in, with the CC-One Agent Desktop embedded on the lower left side. They use the CC-One Agent Desktop to handle voice contacts as described in this chapter. The ICX Agent Desktop is covered in separate documentation from InteractCRM.

Topics covered in this chapter:

- [Agent Desktop Prerequisites](#)
- [Logging in to the Agent Desktop](#)
- [Agent Desktop Window Controls and Indicators](#)
- [Agent States](#)
- [Changing Your Agent Desktop Password](#)
- [Putting a Call on Hold](#)
- [Transferring a Call](#)
- [Consulting with Another Person](#)
- [Creating a Conference Call](#)
- [Disconnecting a Call](#)
- [Making an Outdial Call](#)
- [Searching Call Out and DN Lists](#)
- [Entering Call-Associated Data](#)
- [Requesting Supervisory Help](#)
- [Turning On the Privacy Shield](#)
- [Viewing Statistics](#)
- [Logging out of the Agent Desktop](#)

See also “Troubleshooting” on page 419.

Agent Desktop Prerequisites

Make sure agents are set-up as described in the following sections before they attempt to log in to the Agent Desktop for the first time:

- [System Requirements](#)
- [Browser Requirements](#)
- [Softphone and DN](#)

System Requirements

Following are the minimum system requirements for the CC-One Agent Desktop:

- **Memory:** 2 GB overall application RAM, excluding operating system allocation. Note that some applications may require more memory.
- **Operating System:** Microsoft Windows 7 or Microsoft Windows 8 or Microsoft Windows 10.

In addition, personal firewall settings must be off.

Browser Requirements

The CC-One Agent Desktop requires Internet Explorer 10 or higher, or Mozilla Firefox 38 or higher, or Google Chrome 44 or higher, or for agents with multimedia enabled, only Internet Explorer 10 or Mozilla Firefox 47.

The browser must be set up as follows:

- Browser cache cleared before starting the current release for the first time
- Cookies set to Enabled
- Security level set to Medium
- Show Pictures option selected
- Pop-up blocker disabled
- Javascript enabled

For agents with multimedia enabled, Java Runtime Environment (JRE) 1.7.51 or higher must be installed and enabled in the browser settings. You can download the JRE at:

http://www.java.com/en/download/windows_automatic.jsp

The JRE must use the proxy settings from the default browser, which you can specify in Microsoft Windows as follows: from the **Control Panel**, select **Java** to open the Java Control Panel, and in the **General** tab, click the **Network Settings** button, and select **Use browser settings**.

Softphone and DN

To ensure connectivity, have each agent call his or her own dial number (DN) from the softphone after setup. The same DN must be entered in the login screen when the agent logs in.

Call one agent from another agent's softphone and check the audio quality.

The correct DN must be entered in the login screen:

- Depending on how your system is configured, you may be able to use spaces and special characters such as hyphens or periods in the DN field. Otherwise, you must use numbers only.
- If an incorrect number is entered, a *Not Responding* condition may occur.
- Two or more agents must not enter the same DN because this causes routing confusion. Note that the system might not check for this error condition depending on how your system is configured.
- Agents must not enter a system entry point DN as their contact DN.

Logging in to the Agent Desktop

You log in to the CC-One Agent Desktop through an Internet Explorer or Firefox browser, using login information specified in the Provisioning module.

Before logging in:

- Make sure your phone is *not* in a *Do Not Disturb* state because that will cause the Agent Desktop to go into a *Not Responding* state.
- If you are using a softphone, make sure it is open.

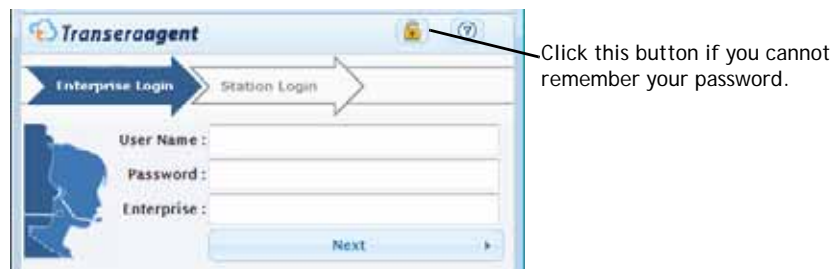
To log in:


1. Open your Web browser and navigate to the URL provided by your administrator.

The Launch window appears.

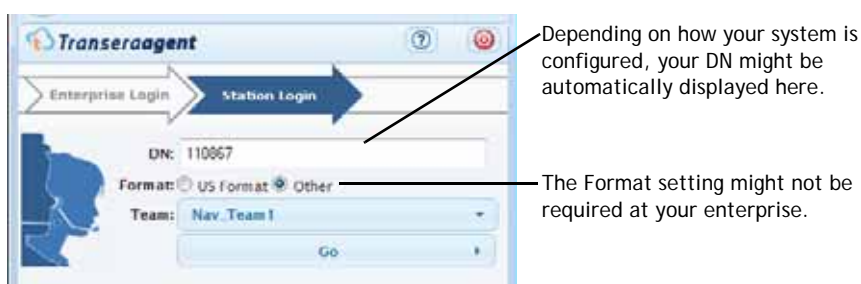
2. Click the **Launch** button.

The Enterprise Login window appears.



3. Enter your user name, password, and enterprise name in the appropriate fields, and then click **Next**.
 - If you cannot remember your password, click the  button. Then, in the dialog box that opens, enter your user name, email address, and enterprise name, and then click **Submit**. If your enterprise uses the agent password reset feature and the information you entered is valid, a new password will be sent to your email address.
 - If a message tells you to change your password, click the **Change Password** button in the message box. Then, in the dialog box that opens, enter the requested information and click **Submit**. Check with your supervisor regarding minimum and maximum password length and allowable characters.

The Station Login screen appears.



Note: If you are an agent with multimedia enabled who does *not* handle voice contacts, the Station Login screen does not appear. Instead, you will see the ICX Desktop, without the CC-One Agent Desktop embedded on the lower left side.

4. If you are required to enter a number in the **DN** field, enter the dial number associated with the phone at which you will take incoming calls.

The format of the number you can enter depends on how your system is configured.
5. In the **Format** field, select **US Format** if the DN has the following format: dialing prefix + area code + 7-digit number (for example, 1-800-555-1212). Otherwise, select **Other**.
6. If you are assigned to more than one team, select a team from the **Team** drop-down list.
7. Click **Go**.

The CC-One Agent Desktop opens and places you in the Idle state.

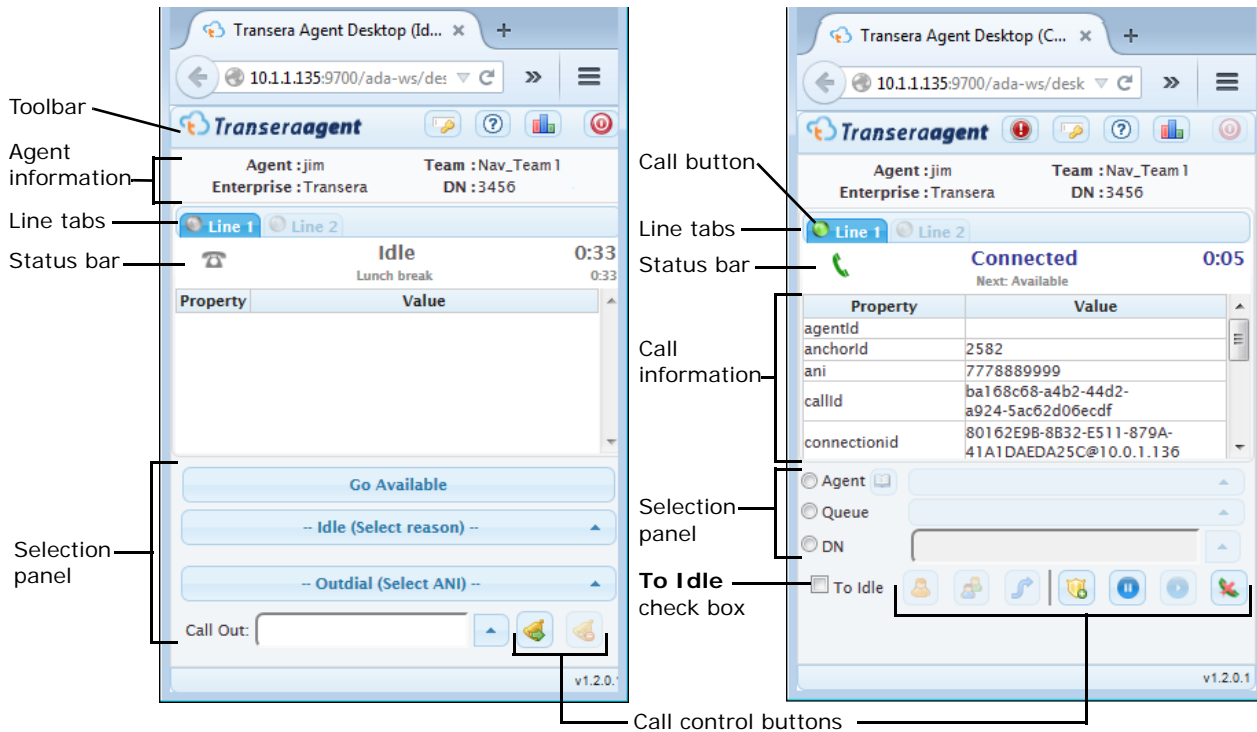
If you are an agent who handles contacts for one or more media types in addition to voice, you will see the ICX Desktop after you log in, with the CC-One Agent Desktop embedded on the lower left side. Use the CC-One Agent Desktop for voice calls as described in this chapter. The ICX Agent Desktop is covered in separate documentation from InteractCRM.






Agent Desktop Window Controls and Indicators














The following examples show the controls and indicators available in the Agent Desktop window.













EXAMPLE 1: No Call Connected; Agent in Idle State

EXAMPLE 2: Call Connected on Line 1



<p>Toolbar</p>	<p>The toolbar at the top of the window displays buttons that enable you to perform the following actions:</p> <ul style="list-style-type: none">  Open the Alert Supervisor window, if enabled for your enterprise, so you can send a help request to your supervisor during a call.  Open online Help. Note that you can also access Help by pressing ALT+F1.  Open the Statistics window if enabled.  Change your password.  Log out of the Agent Desktop. This button is enabled only when you are in the Idle state.
<p>Agent Information</p>	<p>The area directly under the toolbar displays information pertaining to you, such as your user name, enterprise name, DN, and the name of your team.</p>

Line 1 Tab	<p>The Line 1 tab displays information about incoming calls. The color of the call button on the left side of the tab indicates call status:</p> <ul style="list-style-type: none">  Gray indicates that no call is connected or coming in.  Flashing yellow indicates that a call is coming in.  Green indicates that a call is connected and not on hold.  Red indicates that a call is connected but on hold.
Line 2 Tab	<p>The Line 2 tab is enabled when you initiate or receive a consult request. It displays information about consult and conference calls. The color and direction of the arrow icon on the left side of the tab indicates call status.</p> <ul style="list-style-type: none">  Flashing yellow arrow pointing right indicates that you have initiated a consult request, but the consulted person has not answered.  Flashing yellow arrow pointing left indicates that you are receiving a consult request from another agent.  Green arrow pointing right indicates that a consultation call initiated by you is connected on Line 2.  Green arrow pointing left indicates that a call from another agent is connected on Line 2.
Status Bar	<p>A status bar on each tab displays your agent state and how long you have been in that state (see “Agent States” on page 390 for more information). If you have gone into the Idle state, the reason is also displayed.</p> <p>The status bar also displays an icon indicating the status of the current call on that line.</p> <ul style="list-style-type: none">  No call connected  A call is coming in  Active call  Call on hold  Conference call
Call Information	<p>The middle panel in the Agent Desktop window displays a list of call-associated data elements related to the current call—for example, the number the caller dialed from or the number the caller dialed to reach you (such as a toll-free number).</p> <p>When an incoming call is connected, this panel can also display one or more editable fields—for example, a case number or reason code. Editable fields are displayed in a different color and appear at the top of the list or beneath the name of the transfer or consult agent if you are consulting with another agent or the call has been transferred. You can enter or edit text in the Value column. However, if the call is transferred, only the value entered by the final agent is saved to the database.</p>

Selection Panel	<p>When no call is connected, the selection panel provides controls for:</p> <ul style="list-style-type: none"> • Changing your agent state. • Entering wrap-up and idle codes. • Making outdial calls by selecting an entry from an address book or entering a phone number in the Call Out field, depending on how your profile is configured. The Call Out field is displayed only if your system is configured for Outdial. • Selecting the number that will be sent as the caller ID before you make an outdial call. This feature is available only if the Outdial (Select ANI) drop-down list is displayed above the Call Out field. <p>When a call is connected, the selection panel provides controls for specifying the target for a consultation or transfer to an agent, queue, or specific number.</p> <p>The  button next to the Agent drop-down list opens a dialog box that lists all logged-in agents by team. You can select a listed name and then click the Select button to specify the target for a consultation or transfer.</p>
To Idle	<p>This check box enables you to automatically go into the Idle state instead the Available state after you complete and wrap up the current call.</p>
Call Control Buttons	<p>The buttons at the bottom of the window enable you to perform the following actions when you are connected to a call:</p> <ul style="list-style-type: none">  Send a consult request to the target specified in the selection panel.  Establish a conference call with the caller and the person you are consulting with.  Transfer the call to the target specified in the selection panel.  Put the Line 1 call on hold.  Take the Line 1 call off hold; if you are consulting with another person on Line 2, clicking this button puts the Line 2 call on hold. <p>Note: To receive an inbound consult while connected to a call, you must use the second line key or flash function on your agent phone to accept the inbound consult and to toggle between the connected caller on Line 1 and the inbound agent consult on Line 2 of the Agent Desktop.</p> <p>The following optional buttons may also be available during a call:</p> <ul style="list-style-type: none">  After sending a consult request, click this button to cancel the request or disconnect a consult call.  When a call is connected and not on hold, click this button to disconnect the Line 1 call. <p>If you are set up to use the Privacy Shield feature, the following buttons are also available during a call that might be recorded:</p> <ul style="list-style-type: none">  Click to turn on the privacy shield.  After turning on the privacy shield, the button changes as shown here. Click the button to turn off the privacy shield. <p>If Outdial is enabled in your profile, the following buttons are also available:</p> <ul style="list-style-type: none">  Click to make a call to the number entered in the Call Out field.  Click to cancel the call.

Agent States

Agent states are states that you can be in while using the Agent Desktop. Your current state is displayed on the Agent Desktop title bar as well as in the status bar located beneath the Line 1 and Line 2 tabs. The amount of time spent in your current state is also displayed in the status bar.

When you are on a conference call or are consulting with another person, two agent states are displayed—one on the Line 1 tab, and another on the Line 2 tab. For example, if you initiate a consult request while you are handling a call, the Line 1 status bar displays *Connected*, and the Line 2 status bar displays *Consult Requested*.

When a system-initiated state change occurs, the Agent Desktop alerts you by coming into focus or, if the window is minimized, its icon flashes on your taskbar.



Agent states are described in the following sections:

- [Line 1 Agent States](#)
- [Line 2 Agent States](#)

Line 1 Agent States

Agent states that can appear in the Line 1 status bar are described in the following table. Note that some states may not be enabled on your system.

Agent State	Description
Available	You are ready to take calls. After you log in, you must click the Go Available button to receive routed calls.
Connected	You are connected to a caller. When the connection is made, the call button on the Line 1 tab changes to green, the green handset icon appears on the left side of the status bar, and information related to the call is displayed in the call information panel.
Idle	You are logged in but not yet ready to take customer calls. Idle is the default state when the Agent Desktop opens. If during your workday you want to go into the Idle state, do one of the following: <ul style="list-style-type: none"> • If you are in the Available state, select a reason (for example, Break) from the Idle drop-down list. • If you are in any other state, click the To Idle check box, then finish handling the current call or consultation, select a value from the Wrap Up drop-down list (if your system is configured for Wrap Up), and then select a reason from the Idle drop-down list.

Agent State	Description
Not Responding	The phone rang but was not answered within a predefined period of time. The call is returned to the queue. A message appears on your desktop that presents you with the option to either become available to take the next call or go into the Idle state. Select one of the options.
Outdial Reserved	You have initiated an outdial call. Information related to the call is displayed in the call information panel.
Reserved	A call is coming through to your station. The call button on the Line 1 tab changes from gray to flashing yellow, a yellow phone icon appears on the left side of the status bar, and information related to the call is displayed in the call information panel.
Unavailable	While in the Idle or Available state, you were consulted by another agent.
Wrap Up	<p>The call has ended, but you must enter a wrap-up code before taking another call. When the call ends:</p> <ol style="list-style-type: none"> 1. If you want to go into the Idle state after the call, click the To Idle check box if it is not already selected. 2. If the Last Agent Routing check box is displayed, you can select it to request that the call be routed to you the next time the customer calls for the same issue. 3. Select a value from the Wrap Up drop-down list, after which you will be automatically placed in the Available state or the Idle state depending on how your profile is configured and whether you clicked the To Idle check box. <p>If your profile is configured for automatic wrap-up and the  button is displayed to the right of the Wrap Up drop-down list, you can extend the wrap-up time by clicking the  button.</p> <p>While in the Wrap-up state, you cannot receive a routed or transferred call. Note that your system may not be configured to go into the Wrap-up state.</p>

Line 2 Agent States

The following agent states can appear in the Line 2 status bar.

Agent State	Description
Consult Requested	While handling a call, you initiated a consult request. You do not hear ringing when your request is being sent to the selected consultation target.
Consulting	You are consulting with another person.
Incoming Call	A consultation call from another agent is coming through to your station. The Line 2 tab displays a flashing yellow arrow pointing to the left.


Changing Your Agent Desktop Password

Check with your supervisor regarding the minimum length, expiration policy, and any other password guidelines that are in place for your enterprise.

When you log in to the Agent Desktop, a message notifies you if your password is about to expire. The message includes a button that provides access to a dialog box where you can change your password.

You can also change your password after you log in.

To change your password after you log in:


1. Click the  button.
2. In the dialog box that opens, enter the requested information, and then click **Submit**.

Putting a Call on Hold

To put the caller on hold:

- Click the  button.

The caller is put on hold. Notice that both the handset icon in the Line 1 status bar and the call button on the left side of the tab change from green to red.

If you are consulting with another person (Line 2), clicking the  button takes the Line 2 call off hold.

Note: When you initiate a consult request, the connected caller is automatically put on hold. You can put the consulted person on hold by taking the caller off hold (both calls cannot be on hold at the same time).

To take the caller off hold:

- Click the  button.

The call on Line 1 is taken off hold, and the color of both the handset icon in the Line 1 status bar and the call button on the tab change from red to green.

If you are connected to both a caller and a person with whom you are consulting, the consulted person is automatically put on hold.

Note: In the case of an inbound consult, you must use the second line key or flash function on your agent phone to toggle between the caller and the inbound consult call from the other agent.


Transferring a Call

Topics covered in this section:

- [Transferring a Call to a Different Queue](#)
- [Transferring a Call to a Specific Agent](#)
- [Transferring a Call to a Specific Number](#)

Transferring a Call to a Different Queue

To transfer a call to a different queue:

1. While in the Connected state, select the **Queue** button in the selection panel at the bottom of the Agent Desktop, and then select a queue from the drop-down list.
2. Click the  button.

The call is queued and you are placed in the Wrap-up state or the Available state, depending on how your system is set up.


Note: If a queue is deleted from your system while you are on a call, it may still be displayed in the drop-down list. To refresh the list, select a different button in the selection panel, and then select the Queue button again.

Transferring a Call to a Specific Agent




Note:

- You cannot transfer a call to an agent who is in the Wrap-up state.
 - To receive a blind transfer, the target agent must be in the Available state.
 - To receive a consult-transfer, the target agent must be in either the Available or Idle state when you initiate the consult request.
-

To transfer a call to a specific agent:

1. While in the Connected state, select the **Agent** button in the selection panel at the bottom of the Agent Desktop, and then do one of the following:
 - Select an agent from the drop-down list.
 - OR
 - Click the  button to open the **Buddy List** dialog box listing all logged-in agents by team; then select an agent from the list and click the **Select** button at the bottom of the dialog box.

2. Do one of the following:

- To transfer the call immediately (blind transfer), click the  button.
- To announce the call before transferring it, click the  button, wait for an answer, announce the call, and then click the  button.

The call is transferred to the selected agent and you are placed in the Wrap-up or Available state, depending on how your system is set up.

If the agent is unavailable, an error message informs you that the consult or transfer failed. Try another agent or take the caller off hold (see [“To take the caller off hold:” on page 392](#)).

Transferring a Call to a Specific Number




You can transfer a call to a valid phone number that is accessible to your system.

To transfer a call to a specific number:

1. While in the Connected state, click the **DN** button in the selection panel at the bottom of the Agent Desktop, and then either enter a valid phone number in the **DN** field or select a speed number entry from the **DN** drop-down list.

For how to search the DN list, see [“Searching Call Out and DN Lists” on page 398](#).

2. Do one of the following:


- To transfer the call immediately (blind transfer), click the  button.
- To announce the call before transferring it, click the  button, wait for an answer, announce the call, and then click the  button.

The call is transferred to the number you entered and you are placed in the Wrap-up or Available state, depending on how your system is set up.

If you transfer a call to an invalid number, the call is transferred to an overflow number if one exists.

Consulting with Another Person

To consult with another person:

1. While in the Connected state, do one of the following:
 - Select the **Agent** button in the selection panel at the bottom of the Agent Desktop, and then either select an agent from the drop-down list or click the  button to open the **Buddy List**, select an agent from the list, and then click the **Select** button.

OR


- Select the **DN** button in the selection panel, and then either enter a valid phone number in the **DN** field or select a speed number entry from the **DN** drop-down list.

For how to search the DN list, see [“Searching Call Out and DN Lists” on page 398](#).



OR

- Select the **Queue** button in the selection panel, and then select a queue from the drop-down list.




2. Click the  button.

The caller is put on hold, your consult request is sent to the specified target, and (if your enterprise uses the End Consult button) the button changes to  so you can cancel the consult request.


You do not hear ringing, but the Line 2 tab becomes enabled and displays a flashing yellow arrow. The status bar on the Line 2 tab displays *Consult Requested*.

3. If you are consulting to a queue and a destination agent is available, a message asks if you want to proceed. You must click **Consult** within a predetermined time interval or the consultation request will be cancelled.
4. If the specified target does not answer or the consultation fails, either specify another target and click the  button again, or take the caller off hold by clicking the  button.

While you are consulting with another person, you can do the following:



- Click the  button to transfer the call to the consulted party. If the consulted party is another agent, the agent must have been in the Available or Idle state when you initiated the consultation. You cannot transfer a call to an agent in the Wrap-up state.
- Click the  button to put the consulted party on hold and take the caller off hold.
- Click the  button to establish a three-way conference with yourself, the consulted party, and the caller. If the consulted party is an agent, the agent must have been in the Available or Idle state when you initiated the consultation.

If your consult request reaches the specified target's voice mail, you may want to release the second line while still keeping the caller on Line 1 connected. To do so:


- ▶ Either click the  button or do the following:
 1. Hang up the physical phone while the caller is on hold and the consulted party is the active line. This drops the consulted party and leaves the caller on hold.
 2. Take the caller off hold; the system will reestablish audio and call you back.

Creating a Conference Call

To create a three-way conference call with a caller and another person:

1. While in the Connected state, do one of the following:
 - Select the **Agent** button in the selection panel at the bottom of the Agent Desktop, and then either select an agent from the drop-down list or click the  button to open the **Buddy List**, select an agent from the list, and then click the **Select** button.
OR
 - Select the **DN** button in the selection panel, and then either enter a valid phone number in the **DN** field or select a speed number entry from the **DN** drop-down list. For how to search the DN list, see [“Searching Call Out and DN Lists” on page 398](#).
OR
 - Select the **Queue** button in the selection panel, and then select a queue from the drop-down list.
2. Click the  button.


The caller is put on hold and your consult request is sent to the specified target.

3. If you selected a queue in step 1 and a destination agent is available, a message asks if you want to proceed. You must click **Consult** within a predetermined time interval or the consultation request will be cancelled.
4. After the person answers, click the  button.


Note: You cannot create a conference call with an agent who is in the Wrap-up state.

Disconnecting a Call

To disconnect a call on Line 1:

- Either hang up the physical phone or click the  button.

To disconnect a consult call while keeping the caller on Line 1 connected:

- Either click the  button or do the following:
 1. Hang up the physical phone while the caller is on hold and the consulted party is the active line. This drops the consulted party and leaves the caller on hold.
 2. Take the caller off hold, and the system will reestablish audio and call you back.

Making an Outdial Call

If your profile is configured for outdial, you can make an outbound call from the Agent Desktop. The format of the phone number you can dial is determined by settings in your profile. For example, you might be restricted to entering phone numbers of a specific length and beginning with specific area codes.

To make an outdial call:

1. While in the Idle state, either enter a valid phone number in the **Call Out** field or select a speed number entry from the **Call Out** drop-down list, if available. (For how to search the Call Out list, see the next topic, [“Searching Call Out and DN Lists.”](#))

Depending on how your profile is configured, you might not be able to enter a number in the Call Out field or a drop-down list of speed numbers might not be available.

2. If the **Outdial** drop-down list is available above the **Call Out** field, you can select the number to be sent as the caller ID before you place the call.

3. Click the 📞 button.

Your call request is sent to the specified phone number. The Line 1 status bar displays *Outdial Reserved*.

4. When your physical phone rings, pick it up and wait for the called party to answer, or, to cancel the call before the party answers, click the 📞 button on your Agent Desktop.

When the party answers, the Line 1 status bar displays *Connected*.

Searching Call Out and DN Lists

When you select a target for an outdial call or for a consult or transfer, you can search the **Call Out** or **DN** drop-down list as follows:

➤ Type one or more characters in the **Call Out** or **DN** field.

The list displays all entries that include the characters you typed in the order you typed them, wherever the characters appear in the entry. For example, if you type *van*, the matches might include *Alice Vanderbilt*, *Evan Michaels*, and *Peter Ivanoff*.

Entering Call-Associated Data


If your enterprise uses call-associated data (CAD) variables to collect data entered by agents, the call information panel in the Agent Desktop window displays one or more editable fields when an incoming call is connected.

To enter call-associated data:


➤ Click in the editable field and type the appropriate text, or to change the text, select it and type over it. Your supervisor will instruct you regarding what type of data to enter.

The value you enter is saved to the database after you complete the Wrap-up state for that call. If you transfer the call to another agent or queue and both you and the other agent enter or edit a CAD value, only the value sent by the last wrap-up event is saved to the database.


Requesting Supervisory Help

If the  button is displayed on the toolbar, you can click it during a call to send an alert message to all logged-in supervisors. A supervisor who receives your alert message can click it to monitor the call.

To request supervisory help during a call:



1. Click the  button.
2. In the Alert Supervisor window that appears, enter a message and then click the **Send Alert** button. You can enter a maximum of 250 characters.
3. A message appears informing you that your alert has been sent. Click **OK** to dismiss the message.

Turning On the Privacy Shield


The Privacy Shield feature enables you to block the recording of sensitive information such as a credit card number. If your enterprise is set up to use this feature, the **Turn On Privacy Shield**  button might be displayed on the lower right side of your Agent Desktop during a call.

Your supervisor will instruct you regarding when to turn on the privacy shield.


After you click the **Turn On Privacy Shield**  button:

- The button changes to **Turn Off Privacy Shield** .
- The privacy shield remains active until the number of seconds specified in the CC-One system or until you click the **Turn Off Privacy Shield**  button, whichever comes sooner.

Viewing Statistics

If the  button is displayed on the toolbar, you can click it to open the Agent Personal Statistics window. This window displays up to seven tabs, depending on how your service is configured. If a tab is not enabled in your profile, you will see a “No Access” message when you display the tab.

In three of the tabs (Agent Statistics, Agent Outdial Statistics, and Team Statistics) you can click a button on the upper-right side of the tab to switch between real-time and historical reports. Real-time reports display statistics since you logged in and historical reports display statistics for the last 24 hours.

By default, the real-time information displayed in the tabs is refreshed every 90 seconds, but the refresh time provisioned for your enterprise might be different. You can refresh real-time and historical table information by clicking the **Reload**  button at the bottom of a tab.

- [Agent Statistics](#)
- [Agent Outdial Statistics](#)
- [Team Statistics](#)
- [Queue Statistics](#)
- [Threshold Alerts](#)
- [Agent Threshold Alerts](#)
- [Call Recordings](#)

Agent Statistics

If enabled in your profile, the Agent Statistics tab displays the following:

- A button you can click to switch between real-time reports (statistics since you logged in) and historical reports (statistics for the last 24 hours).
- A pie chart showing the amount of time you spent in each agent state and a table displaying the following information.

Column	Description
Agent Name	Your user name. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse arrow (▼) or expand arrow (►) to the left of your user name to collapse or expand the data grouped by channel type.
Login Time	The time you logged in.
Current State	The agent state you are currently in.

Column	Description
Calls Handled	The total number of calls you have handled. Rest the cursor over a number in this column to display a pop-up showing the wrap-up codes you entered and how many times you entered each code.
Average Handle Time	The average length of time you spent handling a call (total talk time plus total hold time and total wrap-up time, divided by total number of connected calls).
Idle Count	The number of times you went into the Idle state. Rest the cursor over the number in this field to see the idle codes you entered and how many times you entered each code.
Total Idle Time	The amount of time you spent in the Idle state.
Average Idle Time	The average length of time you spent in the Idle state (idle time divided by idle count).
Available Count	The number of times you went into the Available state.
Total Available Time	The amount of time you spent in the Available state.
Average Available Time	The average length of time you spent in the Available state (available time divided by available count).
Consult Count	The number of times you answered a consult request plus the number of times you consulted another agent during a call.
Consult Time	The amount of time you spent being consulted by another agent plus the amount of time you spent consulting another agent during calls.
Hold Count	The number of times you put a caller on hold.
Hold Time	The amount of time calls were on hold.
Conference Count	The number of times you established a conference call with the caller and another agent.
Occupancy	The measure of time you spent on customer contacts compared to available and idle time, calculated by dividing total connected time (talk time plus hold time) plus total wrap-up time by total time you were logged in.

Agent Outdial Statistics

If available at your enterprise and enabled in your profile, the Agent Outdial Statistics tab displays the following:

- A button you can click to switch between real-time reports (statistics since you logged in) and historical reports (statistics for the last 24 hours).
- A pie chart showing the amount of time you spent in each agent state during outdial calls and a table displaying the following information

Column	Description
Agent Name	Your user name. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse arrow (▼) or expand arrow (►) to the left of your user name to collapse or expand the data grouped by channel type.
Login Time	The time you logged in.
Outdial Calls Handled	The total number of outdial calls you have handled.
Average Outdial Handle Time	The average length of time you spent handling an outdial call (total outdial talk time plus total outdial hold time and total outdial wrap-up time, divided by total number of outdial connected calls).
Total Outdial Connected Time	The amount of time you were connected to outdial calls.
Total Outdial Talk Time	Total amount of time you spent talking on outdial calls (this does not include hold time).

Team Statistics

If enabled in your profile, the Team Statistics tab displays the following:

- A button you can click to switch between real-time reports (statistics since you logged in) and historical reports (statistics for the last 24 hours).
- A pie chart showing agent activity for the team listed first in the table, and a table displaying the following information for specified teams.

Column	Description
Team Name	The name of the team.
Total Logged In	The number of agents on the team who are logged in (real-time view) or were logged in during the last 24 hours (historical view).
Idle	The number of agents on the team who are in the Idle state (real-time view) or were in the Idle state during the last 24 hours (historical view).

Column	Description
Available	The number of agents on the team who are in the Available state (real-time view) or were in the Available state during the last 24 hours (historical view).
Connected	The number of agents on the team who are connected with a caller (real-time view) or were connected with a caller during the last 24 hours (historical view).
Consulting	The number of agents on the team who are consulting with another agent (real-time view) or were consulting with another agent during the last 24 hours (historical view).
Wrap Up	The number of agents on the team who are in the Wrap-up state ((real-time view) or were in the Wrap Up state during the last 24 hours (historical view).
Not Responding	The number of agents on the team who are in the Not Responding state (real-time view) or were in the Not Responding state during the last 24 hours (historical view).
Outdial	The number of agents on the team who are connected to or are wrapping up an outdial call (real-time view) or were connected to or wrapping up an outdial call during the last 24 hours (historical view).

Queue Statistics

If enabled in your profile, the Queue Statistics tab displays the information for specified queues described in the following table.

Column	Description
Queue Name	The name of the queue.
In Queue	The number of calls currently in the queue.
Current Service Level %	The percentage of calls in queue that have not yet reached the Service Level threshold provisioned for the queue.
Longest Time In Queue	The longest amount of time a call has been in the queue.

Threshold Alerts

If available at your enterprise and enabled in your profile, the Threshold Alerts tab displays information about thresholds that have been breached.

Column	Description
Entity Type	The entity type associated with this threshold alert: Entry Point, Queue, Site, or Team.
Entity Name	The name of the entry point, queue, site, or team that the alert applies to.
Metric	The metric that the threshold is associated with.

Column	Description
Operand	> (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to)
Trigger Value	The value of the metric that the threshold rule defined as the trigger.
Trigger Interval	The number of seconds during which the system will generate only one alert for the threshold rule check.
Current Value	The current value of the metric that was breached.
Event Time	The time the threshold rule was breached.
Generated Time	The time the alert was generated.


Agent Threshold Alerts

If available at your enterprise and enabled in your profile, the Agent Threshold Alerts tab displays information about thresholds that you have breached.

Column	Description
Entity Type	The entity type associated with this threshold alert: Agent.
Entity Name	Your user name.
Metric	The metric that the threshold is associated with.
Operand	> (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to)
Trigger Value	The value of the metric that the threshold rule defined as the trigger.
Trigger Interval	The number of seconds during which the system will generate only one alert for the threshold rule check.
Current Value	The current value of the metric that was breached.
Event Time	The time the threshold rule was breached.
Generated Time	The time the alert was generated.


Call Recordings

If available at your enterprise and enabled in your profile, the Call Recordings tab provides access to recordings of the calls you handled in the last 24 hours.


Column	Description
Team Name	The name of the team for which you handled the call.
Play	To play or download a call recording, click the Play  button and in the dialog box that opens, specify whether you want to open or save the file. When you click Open , the media player installed on your computer opens and plays the file. If a compatible media player is not installed, a dialog box opens and prompts you to download a player.
Queue Name	The name of the queue the call came in on.
ANI	The caller's phone number or, in the case of an outdial call, the phone number of the agent who made the outdial call.
DNIS	The phone number the caller dialed.
Duration	The amount of time between when the call recording started and when it ended.
Date	The date the call recording file was made.
Call Session ID	A value assigned by the system that uniquely identifies the call.

Logging out of the Agent Desktop

Before logging out of the Agent Desktop, note the following:

- Do not click the **Close**  button in the browser window in which the Agent Desktop is running.
- If you are on the phone with a caller or agent, be sure to complete the call, hang up, and go into the Idle state. Otherwise, your Agent Desktop and phone states might be out of sync the next time you log in.
- If you log out or close the Agent Desktop window while a call is on hold, the system will automatically take the call off hold.

To log out:

1. If you are not already in the Idle state, select a reason from the **Idle** drop-down list to go into the Idle state.
2. Click the **Log Out**  button located on the right side of the toolbar at the top of the Agent Desktop window.

... 11 Seatmap

The optional CC-One Seatmap module provides contact center supervisors with real-time visibility into agent activity. Users with Seatmap editing privileges can map agents into groups to create views that can be selected for monitoring by Seatmap users throughout the enterprise. Once agents have been mapped to Seatmap views, the system provides real-time status information for each agent in the currently selected view as well as enterprise-wide key performance indicators and threshold adherence.

You define thresholds for Seatmap in the CC-One Provisioning module with two severity levels (see “[Threshold Rules](#)” beginning on [page 326](#)). When a Seatmap threshold is breached, an alert is sent to the Seatmap module where it can be viewed, acknowledged, and deleted.

Topics covered in this chapter:

- [Seatmap User Interface Overview](#)
- [Monitoring a Seatmap View](#)
- [Creating and Editing Seatmap Templates](#)
 - [Creating a Panel View Template](#)
 - [Creating a Layout View Template](#)
 - [Creating a Freeform View Template](#)
 - [Modifying Seatmap Color Mappings](#)

Seatmap User Interface Overview

The Seatmap module provides two types of screen modes:

- **Full-screen mode**, accessible from the CC-One Management Portal
- **Small-screen mode**, accessible from the Agent Desktop as well as from the CC-One Management Portal

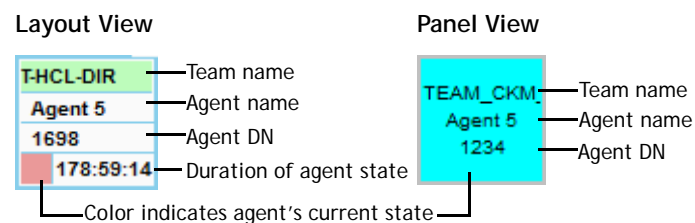
In addition, Seatmap displays two types of views:

- **Panel view**, available in full-screen mode and small-screen mode. Mapping key is agent name.
- **Layout view**, available only in full-screen mode. Mapping key is agent DN.

In full-screen mode, the top left panel on the Seatmap page provides a high level overview of the system in the form of key performance indicators. This is followed by the Alerts panel, which displays the thresholds that have been breached in the system by agents. Alerts and key performance indicators are refreshed every 5 seconds.

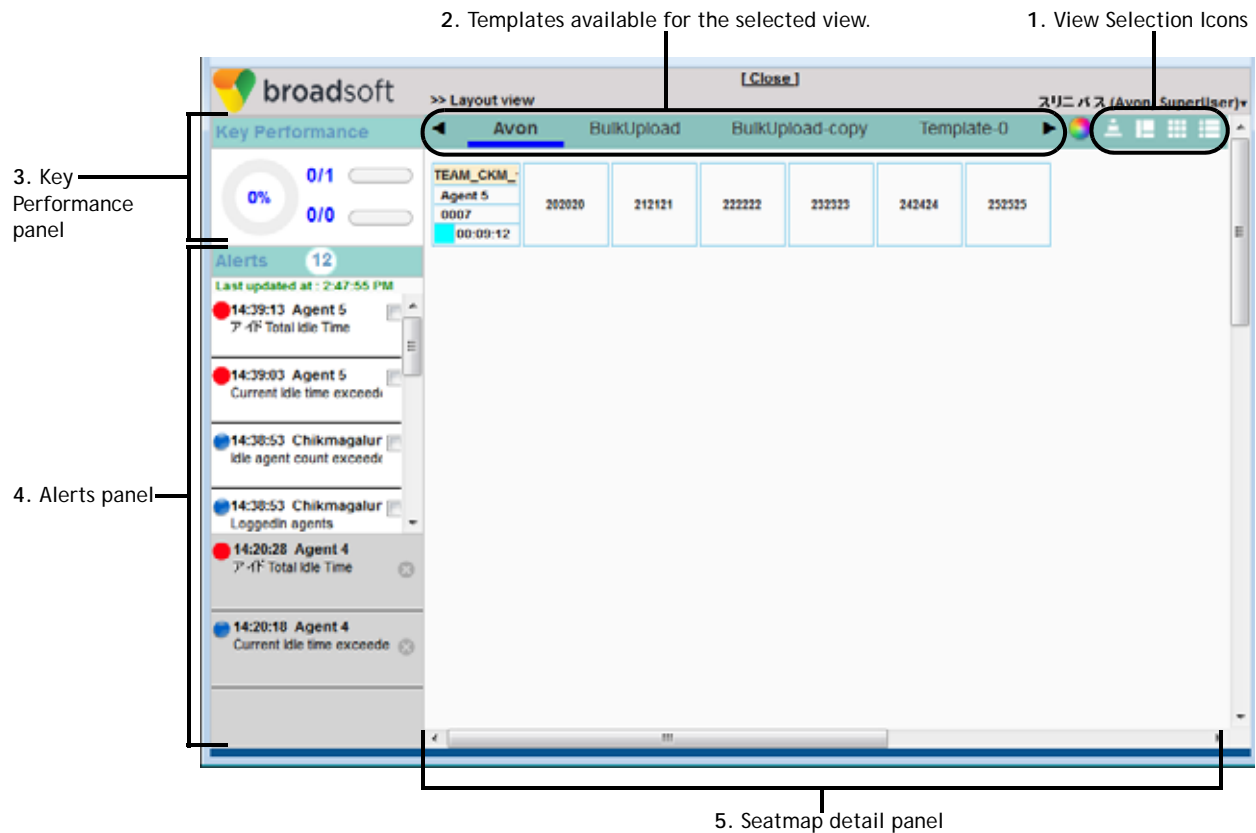
A Seatmap *template* is a view group created by an administrator with editing access privileges. Different templates can be created to represent different collections of agents. Templates that have been previously created are displayed for selection on a horizontal scroll bar above the Seatmap detail panel on the right side of the Seatmap page.

In a Seatmap view, each agent is represented by cell. The appearance and information displayed on a cell is different in the Layout and Panel views, as shown in the following illustration. Each agent state is shown in a different color. You can rest your cursor over a cell to display additional information.



Monitoring a Seatmap View

When you open the Seatmap module, the most recently accessed Layout view is displayed. An example Layout view is shown in the following illustration.

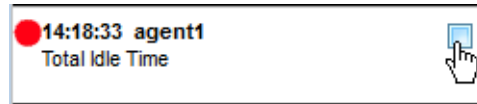


All full-screen Seatmap views include the following sections:

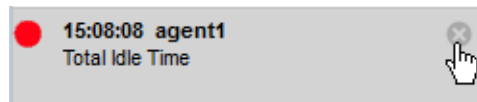
- 1. View selection icons.** Click an icon on the upper-right side of the page to select one of the four Seatmap views: *Layout view*, *Freeform view*, *Full screen panel view*, or *small-screen panel view*.
- 2. Templates available for the selected view.** Each template represents a predefined group of agents that have been mapped to specific positions in the selected Seatmap view. Select a template from the horizontal scroll bar to display agent activity in the Seatmap detail panel on the lower right side of the page.
- 3. Key Performance panel.** This panel displays the following key performance indicators, which are refreshed every 5 seconds: *Call Completion Rate*, *Total Available Agents/Total Actual Agents*, and *Abandoned Calls/Offered Calls*.

4. **Alerts panel.** When a threshold is breached, an alert message appears in this panel. A blue or red dot on left side of the alert message identifies the alert level: blue for *Threshold Level 1* (warning) and red for *Threshold Level 2* (critical).

Click the check box on the right side of an alert message to move the alert to the Acknowledge section of the Alerts panel, identified by a gray background.



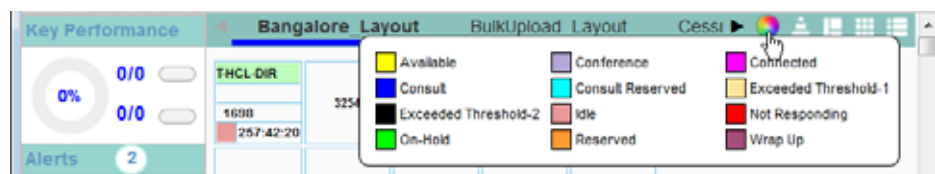
Click the **x** on the right side of the acknowledged alert message to delete the alert.



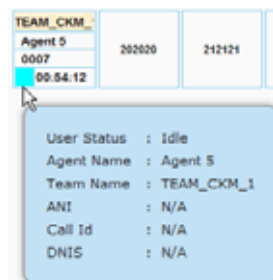
When you delete an acknowledged alert, the total alerts count at the top of the Alerts panel changes. The total reflects the number of active and acknowledged alerts, excluding those that have been deleted. The Alerts panel can display a maximum of the latest 100 active alerts plus the latest 100 acknowledged alerts. All alerts are cleared at the end of the day, enterprise time.

5. **Seatmap detail panel.** Each agent in the selected Seatmap view is represented by a cell that is color-coded to indicate the agent state. When an agent threshold is breached, the cell blinks in the color mapped to the corresponding threshold level. When you acknowledge the alert message (by clicking the **x** on the alert message), the blinking stops.

Rest the cursor over the color wheel icon on the upper-right side of the Seatmap page to display the color mappings chart.



Rest the cursor over an agent cell to display the following information: *User Status* (the agent's current state), *Agent Name*, *Team Name*, *ANI*, *Call Id*, and *DNIS*.



Creating and Editing Seatmap Templates

Users with Seatmap editing access privileges can create, edit, and delete templates to represent different collections of agents.

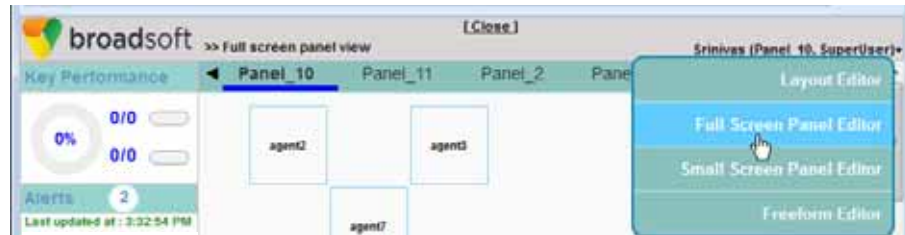
Topics covered in this section:

- [Creating a Panel View Template](#)
- [Creating a Layout View Template](#)
- [Creating a Freeform View Template](#)
- [Copying, Editing, or Deleting a Seatmap Template](#)
- [Modifying Seatmap Color Mappings](#)

Creating a Panel View Template

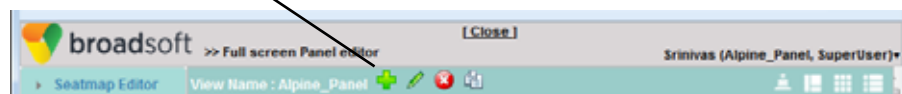
To create a full screen or small screen panel view template:

1. Rest the cursor over your user name on the upper right side of the Seatmap page and select **Full Screen Panel Editor** or **Small Screen Panel Editor** from the drop-down menu.



2. Click the **Add +** button that appears at the top of the detail panel.

Click the Add button.

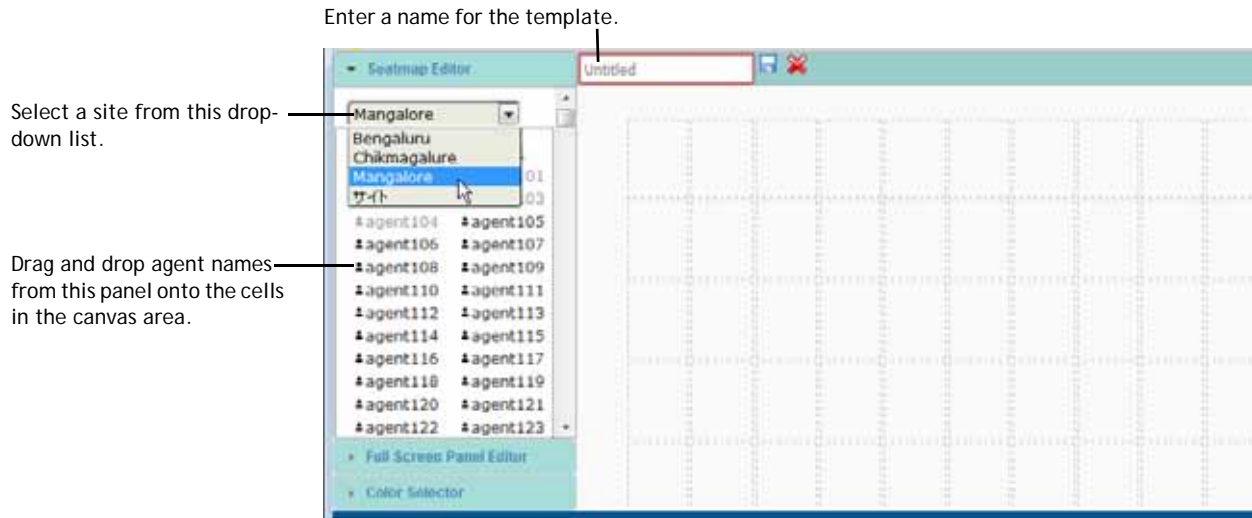


A canvas appears in the detail panel, displaying a grid pattern.

3. Enter a name for the template in the text box at the top of the canvas and select a site from the drop-down list in the **Seatmap Editor** panel on the left side of the page.

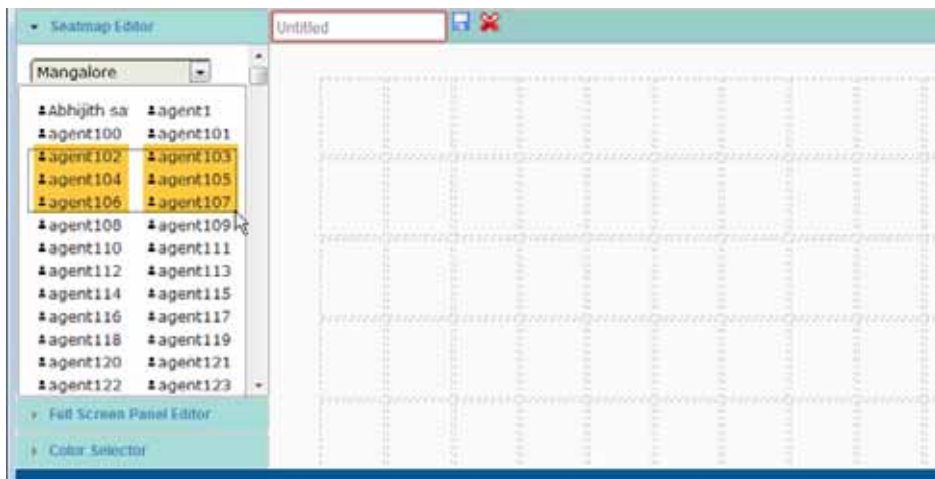
The names of active agents at that site are displayed in the Seatmap Editor panel.

4. Drag and drop agent names onto the cells in the canvas. You can add up to 300 agents in the full screen panel view and 45 in the small screen panel view.





You can drag agent names individually onto canvas cells or you can select multiple agent names and drag the group of names onto the canvas.

To select multiple adjacent agent names, place the cursor to the left of the first name and drag to the last name. Then you can drag the group of names onto the canvas.



5. To reposition an agent, drag the agent cell to an empty cell on the canvas.
6. To remove an agent from the template, rest the cursor over the agent cell, and then click the **x** that appears in the cell's upper-right corner.



7. Click the **Save**  button to save the new template or **Cancel**  to cancel it.

Creating a Layout View Template

When you select Layout Editor and click the **Add +** button, a grid pattern is displayed in the canvas area (same as for panel editors) and you can enter an agent's DN number in any cell up to the maximum available cells.

Or you can click the **Bulk Upload** button and upload a .csv file that you've previously created containing the DN numbers of agents arranged in the pattern you want in the Seatmap template.

Topics covered in this section:

- [Creating a Layout View Template Using the Add Button](#)
- [Creating a .csv File for Bulk Upload](#)
- [Using Bulk Upload to Create a Layout View Template](#)

Creating a Layout View Template Using the Add Button

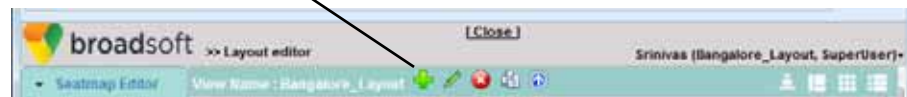
To create a layout view template using the **Add +** button:

1. Rest the cursor over your user name on the upper right side of the Seatmap page and select **Layout Editor** from the drop-down menu.

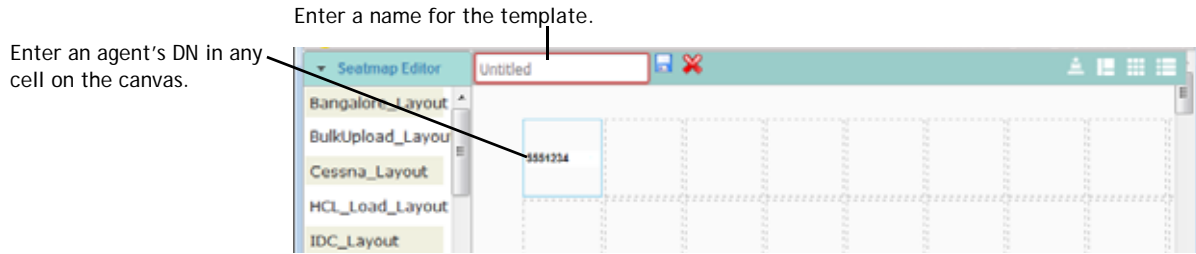



2. Click the **Add +** button that appears at the top of the detail panel. A canvas appears in the detail panel, displaying a grid pattern.

Click the **Add** button.



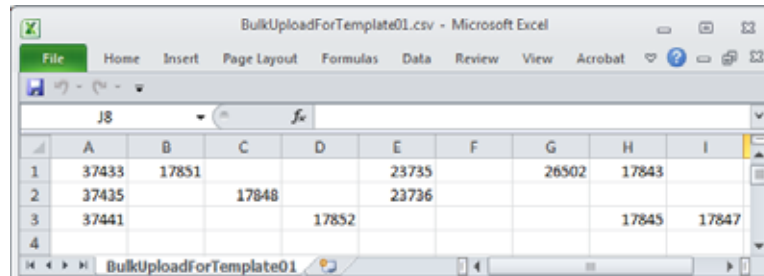
3. Enter a name for the template in the text box at the top of the canvas.
4. Click inside a cell and enter the DN number of an agent. Repeat for each agent you want to add to the template. You can add up to 300 agents.



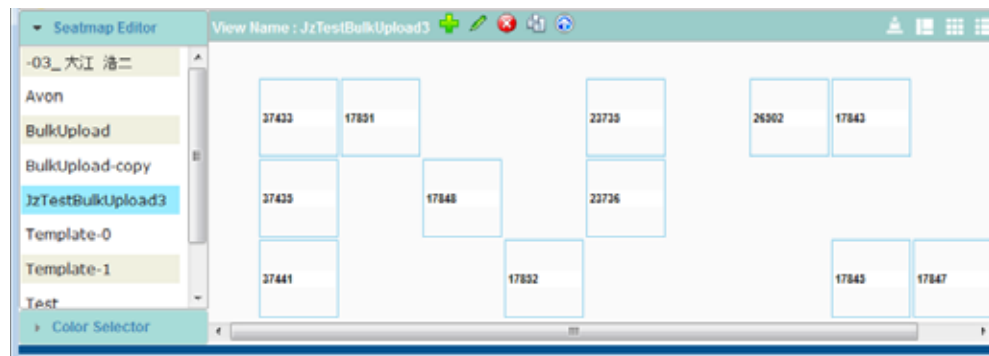
5. You cannot move a cell, but you can delete it and then create it in a different position. To delete a cell, rest the cursor over it and then click the **x** that appears in the cell's upper-right corner.
6. Click the **Save**  button to save the new template.

Creating a .csv File for Bulk Upload


To create the .csv file in Microsoft Excel, enter an agent's DN number in each spreadsheet cell that corresponds to the Seatmap position where you want to place the agent. You can include up to 15 columns and 20 rows. Then save the spreadsheet in the CSV format. For example, the following .csv file would create a Seatmap view for 15 agents positioned in 3 rows.




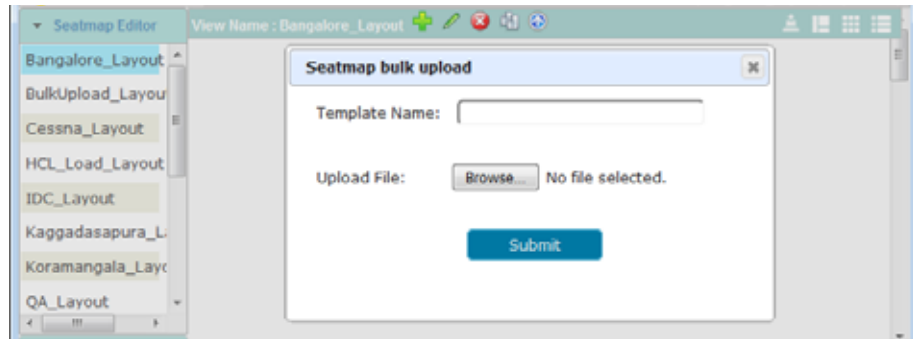
The resulting template would look like this in the Seatmap canvas:



Using Bulk Upload to Create a Layout View Template

To create a layout view template using the **Bulk Upload**  button:

1. Create a .csv file as described in “[Creating a .csv File for Bulk Upload](#)” on [page 414](#) and save the file to your system.
2. Rest the cursor over your user name on the upper right side of the Seatmap page and select **Layout Editor** from the drop-down menu.
3. Click the **Bulk Upload**  button that appears at the top of the detail panel and in the **Seatmap bulk upload** dialog box:
 - a. Specify a name for the template.
 - b. Click the **Browse** button and in the dialog box that opens, navigate to the .csv file that you created, select it, and click **Open**.
 - c. In the **Seatmap bulk upload** dialog box click the **Submit** button.




The new template is displayed on the canvas and in the list of templates in the Seatmap Editor panel on the left side of the Seatmap page.

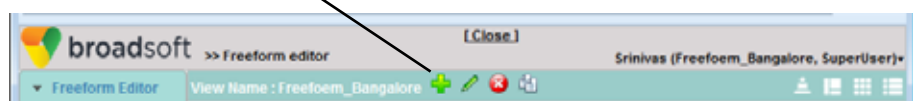
Creating a Freeform View Template

In a freeform view template, you can add a cell at any time, up to a maximum of 300 cells. There is no fixed position of cells.

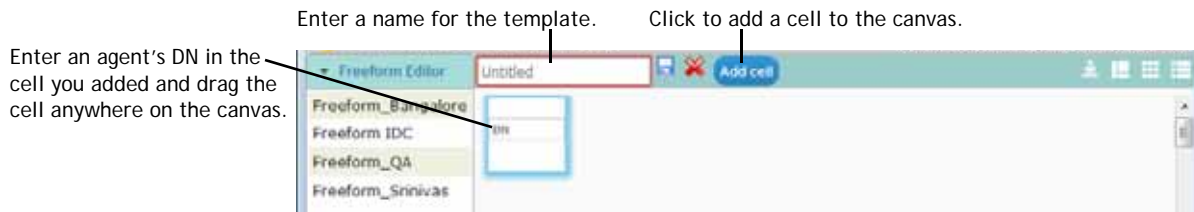
To create a freeform view template:

1. Rest the cursor over your user name on the upper right side of the Seatmap page and select **Freeform Editor** from the drop-down menu.
2. Click the **Add**  button that appears at the top of the detail panel.

Click the Add button.



3. Enter a name for the template in the text box that is displayed and for each agent you want to include in the template:
 - a. Click the **Add Cell** button.
 - b. Type the agent's DN number in the added cell.
 - c. Drag the cell anywhere on the canvas.

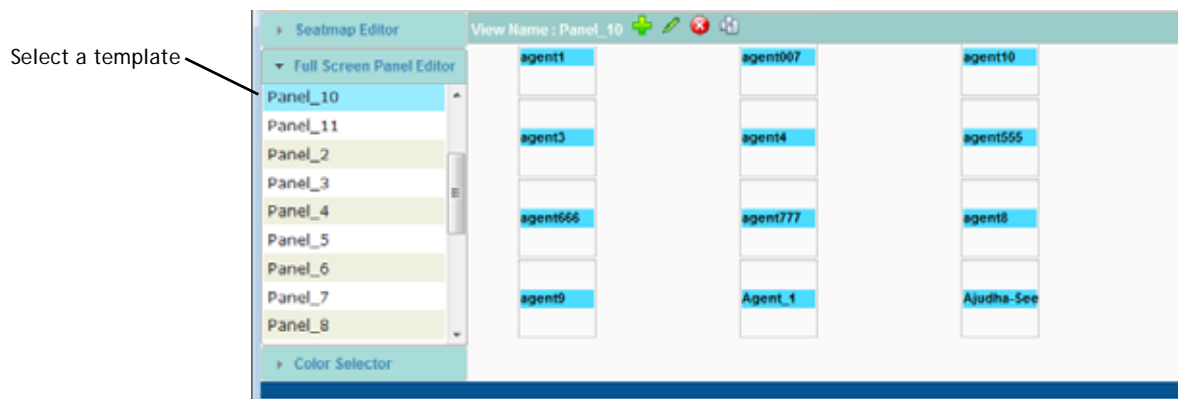





4. Click the **Save**  button to save the new template.



Copying, Editing, or Deleting a Seatmap Template

To copy, edit, or delete a Seatmap template:

1. Rest the cursor over your user name on the upper right side of the Seatmap page and select the editor corresponding to the Seatmap view that you want to copy, edit, or delete.
2. Select a template from the Editor panel that appears on the left side of the page. This panel is labeled **Seatmap Editor** if you are editing a Layout View; otherwise, it is labeled the same as the name of the editor you selected in step 1: either **Freeform Editor**, **Full Screen Panel Editor**, or **Small Screen Panel Editor**.



3. To delete the selected template, click the **Delete**  button at the top of the Seatmap canvas.
4. To copy or edit the selected template, click the **Copy**  or **Edit**  button at the top of the canvas and make the changes you want in the template.

5. To add agents to a template that you are copying or editing:
 - If you are copying or editing a **Panel view**, click the **Seatmap Editor** panel title bar on the left side of the page to display the list of active agents at the site configured for the template. You can drag and drop the names of agents shown in black text onto the cells in the canvas to add them to the template. The names of agents in gray text are disabled from dragging.
 - If you are copying or editing a **Freeform view**, click the **Add Cell** button at the top of the detail panel, enter the agent's DN number in the added cell, and drag the cell anywhere on the canvas.
 - If you are copying or editing a **Layout view**, click inside an available cell on the canvas and enter the DN number of an agent. Repeat for each agent you want to add to the template.
6. To remove an agent from the template you are copying or editing, rest the cursor on the agent cell, and then click the **x** that appears in the cell's upper-right corner.
7. Click the **Save**  button to save the template or **Cancel**  to cancel it.

Modifying Seatmap Color Mappings

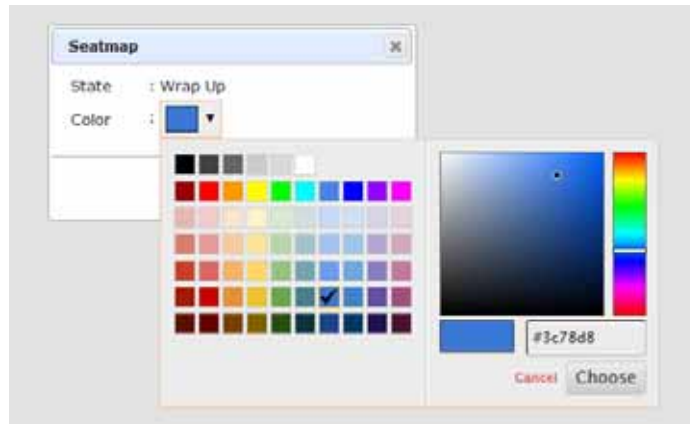
Each agent state and threshold level in the Seatmap module is mapped to a unique color that can be modified by an administrator with Seatmap editing access privileges. The color mappings are the same in every Seatmap template created for the enterprise.

To modify the color mappings:

1. While creating or editing a Seatmap view, click the **Color Selector** panel title bar on the bottom left corner of the Seatmap page to display the chart of assigned colors, and then select the color you want to change.



2. In the **Seatmap** dialog box that opens, click the color square to open the color selector controls and do one of the following:
 - Select a preset color from the chart on the left.
 - OR -
 - Pick a color from the color picker on the right, and then click **Choose** to add it to the preset color chart on the left.



If your selected color is not already assigned to an agent state or threshold level, the dialog box closes and your color change is immediately applied.

.... 12 Troubleshooting

This chapter provides advice for handling problems you might encounter while working with the CC-One system:

- [Troubleshooting CC-One Management Portal Problems](#)
 - [CC-One Management Portal Problems](#)
 - [Reporting Management Portal Issues to Customer Support](#)
- [Troubleshooting CC-One Agent Desktop Problems](#)
 - [Network Interruptions](#)
 - [Agent Desktop Application Problems](#)
 - [Audio Problems](#)
 - [Reporting Agent Desktop Issues to Customer Support](#)

Troubleshooting CC-One Management Portal Problems

Topics covered in this section:

- [CC-One Management Portal Problems](#)
- [Reporting Management Portal Issues to Customer Support](#)

CC-One Management Portal Problems

If you experience a problem while using the CC-One Management Portal, the following may help you solve the problem.

Problem	Description/Workaround
You cannot log in to the CC-One Management Portal.	Check to make sure that the correct user name and password are entered.
You cannot access a module from the Management Portal, or you cannot see some entry points or queues.	You do not have the correct privileges to access these modules, entry points, or queues. Contact your CC-One administrator.
The Management Portal does not display data regarding agents or calls, or shows that no agents are logged in.	Make sure that the privacy setting for Internet Explorer is set to Medium .
Occasionally the message "Please Refresh the Page" appears in the Real-Time Reports module.	Log out of the current CC-One session. Close any remaining CC-One windows and log in again.
When you resize the Agent view of a real-time agent report, tooltips for idle and wrap-up codes are sometimes displayed in the graph area instead of near the cursor.	Maximize the window to display the tooltip near the cursor.
Too many abandoned calls are being reported.	Escalate to Customer Support.
While viewing a chart in a report or on a monitoring page, you see the following message "Communication Interruption on <date> at <time>".	The system has been unable to refresh the data in the chart since the time indicated in the message, typically because of an intermittent network interruption or server issue. If the problem persists for several minutes, notify your system administrator.
The real-time reports are not refreshing on the Management Portal.	Escalate to Customer Support.
The real-time report statistics are not displayed.	Escalate to Customer Support.

Problem	Description/Workaround
In a real-time agent report, the wrap-up count and number of entered wrap-up codes do not match.	This discrepancy occurs when an agent logs out while still in the Wrap-up state without selecting a wrap-up code. Instruct agents to always go into the Idle state and then click the Log Out button to log out rather than closing the browser while logged in.
Changes to the names of existing idle and wrap-up codes do not appear immediately in agent reports. Instead, agent reports display the previous code names before they were edited or <i>N/A</i> for a new code.	Log out and then log in again to see the changes.
When exported to CSV format, data in the Agent View of a current snapshot agent report is displayed incorrectly.	The Time Value is displayed in two cells instead of one when exported to CSV format. This is because a comma separates the day from the date and time in the Login Time field.
When you export historical report data to Microsoft Excel that includes date and time in the hh:mm:ss format, Excel displays only the hours and minutes, and not the seconds.	By default, Excel displays the data in hh:mm format. However, you can double-click in the cell to see the data in hh:mm:ss format.
For a new team, data in the agent interval report is displayed in half-hour intervals from the time an agent on the team logs in after system restart.	This is transient for teams that log in for the first time. Normally, data is displayed in half-hour intervals from midnight.
In the Historical Reports module, occasionally the parameters for a customized default report are not saved after you log out and log in again.	After you save a custom report, wait 10-15 seconds before logging out.
You cannot make a monitoring request.	Ensure that you are using the correct DN and prefix.
Monitoring session left open for an hour or longer displays a blank page or unexpected behavior.	Close the module and re-open it.
Supervisor phone rings even when the monitoring request is for a different queue.	If a monitoring request is made for a team and if multiple queues use the same team for routing, any of the queue's calls for that team can be monitored.
A call ends, but the monitoring screen indicates that the call is still in progress.	Escalate to Customer Support

Reporting Management Portal Issues to Customer Support

When escalating a Management Portal issue to BroadSoft Customer Support, make sure to provide the following information:

- The login and user name of the person experiencing the problem.
- The time that the issue was first observed.
- If the problem occurred in the Monitoring module, the number that the supervisor was attempting to call and a call session ID, if available.

Troubleshooting CC-One Agent Desktop Problems

Topics covered in this section:

- [Network Interruptions](#)
- [Agent Desktop Application Problems](#)
- [Audio Problems](#)
- [Reporting Agent Desktop Issues to Customer Support](#)

Network Interruptions

If a network interruption occurs that lasts for less than two minutes, all the Agent Desktops display a “Reconnecting” message and then successfully reconnect.

If a network interruption lasts longer than two minutes, instruct agents to close the current Agent Desktop window, and then log in using the primary URL. If the login fails with the primary URL, instruct agents to use the backup application center login.

Escalate all network interruptions; report the time the problem occurred and the number of agents affected.

If the network to the primary application center is down, CC-One Management Portal users cannot view any statistics.

Agent Desktop Application Problems

If you experience a problem while using the Agent Desktop application, the following may help you solve the problem.

Problem	Description/Workaround
You are not able to log in to the Agent Desktop.	<ol style="list-style-type: none"> 1. Check to make sure that cookies are enabled in Internet Explorer. 2. Ensure that the correct user name and password are entered in the login screen.
During login, the error message "Invalid phone number" appears after you click Go.	Check the format of the DN that you entered and make sure the number is valid.
You accidentally closed the browser window while on a call.	If you close the browser window while on a call, you cannot log in again until you complete the call. If you close the browser window while the call is on hold, the system automatically takes the call off hold.
When you refresh the Agent Desktop window, you are logged out and the login screen is displayed.	Log in again. Avoid refreshing the window while logged in.
The status bar on the Agent Desktop displays "Not Responding" and your phone does not ring.	<ol style="list-style-type: none"> 1. Check the volume setting on the phone and make sure that the ringer is set to "high." 2. Check the DN (dial number), including the dialing prefix, and make sure it is correct. 3. After resolving the problem, change your state to Available or Idle by clicking one of the buttons on the message that appeared when you entered the Not Responding state.
After reconnecting to the system following a network interruption, you are suddenly logged out.	Log in to the Agent Desktop again. If you are unable to log in, escalate to Customer Support.
Re-launching the Agent Desktop while logged in may create problems.	Do not open more than one Agent Desktop application at a time on the desktop.
The Agent Desktop becomes very slow.	This can happen when you leave the Agent Desktop open for long periods of time. Close both the Agent Desktop and the browser after logging out of the system. If this does not help, end the process from within the Windows Task Manager.
The Agent Desktop occasionally logs out agents following a network interruption.	Log in to the Agent Desktop again.
The Agent Desktop is not completely displayed.	Minimize the Agent Desktop, and then restore it from the taskbar.
Launch pages and graphs are not displayed properly.	Make sure that in Internet Explorer, the Show Pictures option is selected in the Advanced tab of the Internet Options dialog box.

Problem	Description/Workaround
You are available but no calls are sent to you.	Make sure you are in the Available state and are logged in to the correct team.
You are talking to a customer, but the Agent Desktop status bar displays <i>Reserved</i> .	Report the incident to Customer Support.
Your agent softphone is not ringing, but the Agent Desktop status bar displays <i>Not Responding</i> .	Make sure that you entered the correct DN.
The Agent Desktop status bar displays <i>Re-connecting</i> .	Check to see if the PC network cable has been disconnected or loosened. If you do not see a message indicating that there has been a network problem, escalate to Customer Support.
You answer a call, but the call disconnects after 30 seconds.	If <i>Not Responding</i> is displayed in the Agent Desktop status bar, change to the Available state and wait for the next call.
The Internet Explorer browser freezes.	Open Windows Task Manager and end all browser processes.
Pop-up blockers appear.	From the Internet Explorer Tools menu, disable pop-up blockers.
The Agent Desktop status bar displays a <i>connected</i> state while the phone is ringing.	Report the incident to Customer Support.
An outbound call fails.	Make sure you entered the correct DN and prefix.
During a blind transfer, call details are not displayed on the Agent Desktop of the receiving agent while that agent is in the Reserved state.	The Reserved state is very transient. Call details are displayed as soon as the second agent answers the call.

Audio Problems

The following may help to resolve audio problems that could occur while using the Agent Desktop.

Problem	Description/Workaround
Echo or low volume	Check the phone settings. If using a softphone, check the Microsoft Windows and softphone settings.
Jitter/Stutter audio -OR- High latency	Bad connectivity, probably due to a network problem. Check to make sure that your PC is not also running other software that uses audio. Escalate to Customer Support.
Cross talk	Escalate to Customer Support.
One-way audio	Make sure you are not on mute. If not, escalate to Customer Support.

Reporting Agent Desktop Issues to Customer Support

When escalating an Agent Desktop issue to BroadSoft Customer Support, make sure to provide the following information:

- Ask the agent to provide a screen capture of the Agent Desktop screen.
- Include the time that the issue was first observed.



CC-One Report Parameters

This appendix provides descriptions of the parameters available in CC-One reports.

Topics covered:

- [Call Report Parameters](#)
- [Agent Report Parameters](#)
- [Historical Skill Report Parameters](#)
- [Historical Threshold Alerts Report Parameters](#)
- [Usage Metrics Report Parameters](#)

Call Report Parameters

The parameters available in CC-One real-time and historical call reports are described in the following table. In the table, *CDR* is an abbreviation for *Call Detail Report*.

Parameter	Description	Report
% Abandoned	The percentage of calls that were abandoned during the report interval. $(\text{Abandoned}/\text{Total}) * 100$	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
% Answered	The number of answered calls divided by the number of calls that entered the queue minus short calls multiplied by 100. $(\text{Answered}/(\text{Answered} + \text{Abandoned})) * 100$	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Abandoned	The number of calls that were abandoned during the report interval. An abandoned call is a call that was terminated without being distributed to a destination site, but that was in the system for longer than the time specified by the Short Call threshold provisioned for the enterprise.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues

Parameter	Description	Report
Abandoned Time	The cumulative amount of time calls were in the system for longer than the time specified by the Short Call threshold, but terminated before being distributed to an agent or other resource.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report). Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Adjusted Service Level %	The number of calls that were either answered or abandoned within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100. $\frac{((\text{In Service Level} + \text{Abandoned within SL}) / (\text{Answered} + \text{Abandoned})) * 100}{}$ Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams
Agent	The name of the agent who handled the call or a numeric ID code if the call was handled by a capacity-based team resource instead of by a CC-One agent.	CDR
Agent Start Time	The time the agent picked up the phone and began talking with the caller.	CDR
ANI	The ANI digits delivered with the call. ANI, or Automatic Number Identification, is a service provided by the phone company that delivers the caller's phone number along with the call.	CDR
Answered	The number of calls that were routed from the queue to an agent or available resource and were answered by the agent or resource.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Answered Time	The cumulative amount of time between when calls entered the queue and when they were answered (connected to an agent or other resource) during the report interval. Because answered time is calculated after the call is answered, answered time for calls that are waiting to be answered is not reflected in the report.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Available Agents	The number of logged-in agents who are currently in the Available state.	Current Snapshot Call report

Parameter	Description	Report
Avg Abandoned Time	The total amount of time that calls were in the system before they were abandoned divided by the total number of calls that were abandoned: $\text{Abandoned Time}/\text{Abandoned}$	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Avg Connected Time	The total connected time divided by the total number of calls that were answered during the report interval: $\text{Connected Time}/(\text{Answered} + \text{Secondary Answered})$	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg Handle Time	The average length of time spent handling a call (connected time plus wrap-up time), divided by number of answered calls: $\text{Connected Time} + \text{Wrap Up Time}/(\text{Answered} + \text{Secondary Answered})$	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg IVR Time	The total amount of time that calls were in the IVR system divided by the total number of calls that were in the IVR system.	Real-time Call Interval & Historical Call reports for Entry Points
Avg Queued Time	The total amount of time that calls were in queue divided by the total number of calls that were queued: $\text{Queued Time}/\text{Queued}$	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues.
Avg Speed of Answer	The total answered time divided by the total number of answered calls: $\text{Answered Time}/\text{Answered}$	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg Wrap Up Time	The total amount of time agents spent in the Wrap-up state divided by the total number of answered calls: $\text{Wrap Up Time}/(\text{Answered} + \text{Secondary Answered})$	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Blind Transfer Count	The number of times the call was transferred out of the queue by the agent without consulting first.	CDR

Parameter	Description	Report
Blind Transfers	The subset of transferred out calls that were transferred by the agent to another agent or an external DN without the first agent consulting or conferencing with the party to whom the call was transferred.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Call Duration	The amount of time between when the call arrived at the entry point or queue and when it was terminated.	CDR
Call End Time	The time the call was terminated.	CDR
Call Start Time	The time the call arrived at the entry point or queue.	CDR
Completed	The number of calls that ended during the report interval. Answered, abandoned, and disconnected calls are included in this count. Transferred and short calls are not.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Conference Count	The number of times the agent established a conference call with the caller and another agent.	CDR
Conference Count	The number of times agents initiated a conference call to an agent or external number.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Conference Time	The amount of time an agent spent in conference with the caller and another agent.	CDR
Connected	The number of calls currently connected to an agent.	Current Snapshot Call report
Connected Time	The time interval between when calls were answered by an agent or other resource and when they were terminated. Because connected time is not calculated until the call is terminated, the connected time for a call that is still in progress is not reflected in the report.	Real-time call interval reports for Sites, Teams, Queues, & Skills by Queue; Historical Call reports for Queues, Sites, & Teams
	The total amount of time the call was connected to an agent (talk time plus hold time).	CDR

Parameter	Description	Report
Consult Count	The number of times agents initiated a consult with another agent or someone at an external number while handling a call.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
	The number of times the agent consulted another agent during the call.	CDR
Consult Errors	The number of times agents did not respond to a consult invitation.	CDR
Consult Time	The amount of time an agent spent consulting with another agent while handling this call.	CDR
CTQ Answer Count	The number of times consult-to-queue requests were answered.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
CTQ Answer Time	The cumulative amount of time between when consult-to-queue requests were answered and when the consultations ended.	Historical Call reports for Queues, Sites, & Teams
CTQ Request Count	The number of times consult-to-queue requests were initiated.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams; CDR
CTQ Request Time	The cumulative amount of time between when consult-to-queue requests were initiated and when the consultations ended.	Historical Call reports for Queues, Sites, & Teams; CDR
Current Service Level %	The percentage of calls in queue that have not yet reached the Service Level threshold provisioned for the queue (in a queue report) or skill (in the skill rows of a skills-by-queue report). Note that although this metric is visible for outdial calls, it is not meaningful for such calls.	Current Snapshot Call report
Disconnected	The number of calls that were answered (that is, connected to an agent or distributed to and accepted by a destination site), but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams

Parameter	Description	Report
DN	The number the caller dialed (DNIS).	All DN Canned report
DNIS	The DNIS digits delivered with the call. DNIS, or Dialed Number Identification Service, is a service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.	CDR
Entry Point	The name of the entry point associated with the call.	CDR
From Entry Point	The number of calls that entered this queue after having been classified into the queue from an entry point by the IVR call control script.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
	The number of calls that came in to this entry point from another entry point.	Real-time Call Interval & Historical Call reports for Entry Points
Full Monitored Calls	The number of calls that were monitored from beginning to end.	Monitored Calls report
Handle Time	The amount of time spent handling the call (Connected Time + Wrap Up Time).	CDR
	The cumulative amount of time spent handling calls: Connected Time + Wrap Up Time	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Handle Type	How the call was handled. Possible values: <ul style="list-style-type: none"> • park. The call was queued in the CC-One network and subsequently ended without being distributed to a site. • park_and_transfer. The call was queued in the CC-One network and subsequently distributed to a site. • straight_transfer. The call was distributed to a site upon arrival without being queued in the CC-One network. • ivr. The call was handled by the IVR but the caller disconnected before the call was transferred or parked. • unknown. This is the default value when no other value overrides it. 	CDR

Parameter	Description	Report
Hold Count	The number of times the call was put on hold.	CDR
	The number of times a caller was put on hold.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Hold Time	The amount of time the call was on hold in this queue (for a queue CDR) or in all underlying queues (for an entry point CDR).	CDR
In IVR	The number of calls that are currently in the IVR system.	Current Snapshot Call report
In Queue	<p>The number of calls currently in the queues that are covered in the report. In the case of entry-point reports, this is the number of calls that are currently in queues fed by the entry point.</p> <p>In entry point and queue reports, you can click a number in this column to display the <i>Age of Calls in Queue</i> pie chart in a pop-up window. The chart displays the number of calls that have been in the queue for the length of time represented by three time segments. The time segments are derived by dividing the <i>Longest Time in Queue</i> value by three, rounding the resulting value down to the nearest 10 seconds, and then multiplying that value by 1, 2, and 3. For example, if the Longest Time in Queue value is 85 seconds, then $85/3=28.3$, which is rounded down to 20, and the chart displays time segments of 20, 40, and 60 seconds.</p>	Current Snapshot Call report
In Service Level	<p>The number of calls that were answered within the Service Level threshold provisioned for this queue or skill (in a skills interval by queue report).</p> <p>Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.</p>	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams
Invisible Monitored Calls	The number of calls that were monitored using the Invisible mode, which prevents the monitoring session from being displayed on Management Portals other than that of the initiating supervisor.	Monitored Calls report
IVR Ended	The number of calls that ended in the IVR but were not short calls. (Call interval real-time and Historical call reports for entry points)	Real-time Call Interval & Historical Call reports for Entry Points

Parameter	Description	Report
IVR Time	The amount of time the call was in the IVR system.	CDR
	The cumulative amount of time calls were in the IVR system.	Real-time Call Interval & Historical Call reports for Entry Points
Logged-in Agents	The number of agents who are currently logged in to this team or to all teams at this site. At the queue level, this is the number of agents logged in to all teams at the sites serving this queue.	Current Snapshot Call report
Longest Call In Queue Time	The longest amount of time a call has been in each queue covered in the report.	Current Snapshot Call report
Maximum Wait Time	The longest amount of time a call was in the queue waiting to be answered.	Historical Call reports for Queues
Midcall Monitored Calls	The number of calls for which monitoring began after the call was already in progress.	Monitored Calls report
Monitor Flag	<p>Whether or not the call was monitored, coached, or barged in on. Possible values:</p> <ul style="list-style-type: none"> • Not Monitored. The call was not monitored • Monitored. The call was monitored. • Whisper-Coach. While the call was being monitored, the monitoring supervisor coached the agent, but did not barge in on the call. • Barged-In. While the call was being monitored, the monitoring supervisor barged in on the call. The supervisor might have also coached the agent. (If the call was both coached and barged-in on, the value of this parameter is <i>Barged-In</i>). <p>For information about monitoring, see Chapter 5, “Call Monitoring” beginning on page 207.</p>	CDR
New	The number of external calls that came in to the entry point.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that came into the system via a specific dialed number.	All DN Canned report
No. of Transfers	The number of times the call was transferred by an agent.	CDR

Parameter	Description	Report
Overflow	The number of calls that were sent to the overflow number provisioned for the queue and were answered. Typically, a call is sent to an overflow number if it has been queued for longer than the maximum time specified in the routing strategy or because an error occurred when the call was sent to an agent. If the call is not answered, it is included in the Abandoned or Disconnected count when it ends.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Queue	The name of the queue associated with the call.	CDR
	The name of the queue that was monitored.	Calls Monitored report
Queue Time	The amount of time the call was in a queue waiting to be sent to a destination site.	CDR
Queued	The number of calls that entered the queue during this interval.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Queued Time	The cumulative amount of time calls were in queue, waiting to be sent to an agent or other resource. Because queued time is calculated after the call leaves the queue, the queued time for a call that is still in the queue is not reflected in the report.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Record Flag	Whether or not the call was recorded by CC-One through the optional call recording feature.	CDR
Requeued	The number of calls that left this queue after having been transferred by the agent to another queue. For calls to be requeued, the first agent clicks the Queue button, selects a queue from the drop-down list, and clicks Transfer .	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
S No.	A sequence number identifying each leg of a call as it moves through the CC-One system. Click an entry in this column to open a window displaying the history of the call throughout its life cycle.	CDR
Secondary Answered	The number of calls that were answered by an agent after being transferred to the agent by another agent.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams





Parameter	Description	Report
Service Level %	<p>The number of calls that were answered within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100:</p> $((\text{In Service Level}) / (\text{Answered} + \text{Abandoned})) * 100$ <p>Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.</p>	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams.
Session ID	A value assigned by the system that uniquely identifies a call during its life cycle.	CDR
Short	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being distributed to a destination site or connected to an agent.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being connected to an agent.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Site	The call center location to which the call was distributed.	CDR
	The name of the site that was monitored.	Monitored Calls report
Team	The name of the team to which the call was distributed.	CDR
	The name of the team that was monitored.	Monitored Calls report
Terminating Party	Who terminated the call: Agent or Caller	CDR

Parameter	Description	Report
Termination Type	<p>How the call was terminated. Possible values:</p> <ul style="list-style-type: none"> • abandoned. The call was terminated before being distributed to a destination site, but was in the system for longer than the time specified in the Short Call threshold provisioned for the enterprise. • agent_transfer. The call was transferred from one agent to another. • transfer_error. The call could not be transferred to the agent. • normal. The call ended normally. • reclassified. The call was sent to another entry point. • transferred. The call was transferred by an agent. • self_service. The call ended in the IVR. • short_call. The call was never connected and the total duration of the call was less than the specified Short Call threshold. • quick_disconnect. The call was connected, but the agent talk time for the call was less than the specified Sudden Disconnect threshold. • overflow. The call was transferred to the overflow destination number provisioned for the queue—typically because the call was queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent. 	CDR
To Entry Point	The number of calls that were transferred to another entry point.	Real-time Call Interval & Historical Call reports for Entry Points
To Queue	The number of calls that were sent to a queue.	Real-time Call Interval & Historical Call reports for Entry Points
Total Monitored Calls	The total number of calls monitored during the report time interval.	Monitored Calls report
Transfer Errors	The number of times an error occurred during the transfer process.	CDR

Parameter	Description	Report
Transferred	The sum of all calls transferred from this queue to an agent, external DN, or another CC-One queue: Transferred Out + Requeued	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Transferred In	The number of calls that were transferred to this entry point by an agent.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that entered this queue after having been transferred into the queue by an agent who clicked the Queue button, selected a queue from the drop-down list, and clicked Transfer .	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Transferred Number	The phone number to which the agent transferred the call in an agent-to-DN transfer. This parameter appears in the CDR window that opens when you click an entry in the S No. (sequence number) column of either an entry point or queue call detail record (CDR) as described in step 7 on page 226 .	CDR
Transferred Out	The number of calls that left this queue after having been transferred by an agent to an external DN or to another agent. Transferred out calls result when an agent clicks the Agent button, selects an agent from the drop-down list, and clicks Transfer , or when the agent clicks the DN button, enters a phone number, and clicks Transfer . Transferred out calls may begin as a consultation or conference, but will be counted as transferred out only when the first agent completes the transfer to the second party.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Wrap Up	The wrap-up code that the agent gave for the call. Note that if the agent wraps up the call after the CDR is generated, the corresponding CDR will be updated after the agent selects the wrap-up code for that call.	CDR
Wrap Up Time	The amount of time an agent spent in the Wrap-up state after handling the call.	CDR
	The cumulative amount of time agents spent in the Wrap-up state after handling the calls.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams

Agent Report Parameters

The parameters available in CC-One real-time and historical agent reports are described in the following table. In the table, *ADR* is an abbreviation for *Agent Detail Report*.

Parameter	Description	Report
Action	<p>Icons you can click to perform an action:</p> <ul style="list-style-type: none"> Click the Logout () icon to log out the agent. For more information, see “Logging Out an Agent” on page 187. Click the Monitor icon () to open the Call Monitoring module where you can monitor the agent’s call by entering your callback number and clicking the Midcall Monitor button. <p>This icon is displayed only in the Team view and only if the agent is in the Connected state and your user role authorizes midcall monitoring. For more information, see Chapter 5, “Call Monitoring” beginning on page 207.</p>	Current Snapshot/ Team & Skill views
Agent	<p>The name of an agent in the report.</p> <p>If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the a collapse arrow () or expand arrow () to the left of an agent name to collapse or expand the data grouped by channel type.</p>	Current Snapshot/ Agent view; Real- time Agent Interval/Agent- level
Agent Requeue	The number of times an agent requeued an inbound call.	Historical Agent Summary & Interval reports; ADR; Current Snapshot/Agent view; Agent Trace report
Agent Transfer	The number of times an agent transferred an inbound call to another agent.	Historical Agent Summary & Interval reports; ADR; Agent Trace report

Parameter	Description	Report
Available	<p>Count. The number of times an agent went into the Available state.</p> <p>Total Time. The total amount of time an agent spent in the Available state.</p> <p>Average Time. (<i>Not in ADR or Current Snapshot/Agent view or Agent Trace report</i>) The average length of time agents were in the Available state (Total Available Time divided by Available Count).</p> <p>% Time. (<i>Only in ADR</i>) The percentage of time the agent was in the Available state.</p>	Historical Agent Summary & Interval reports; ADR & Current Snapshot/Agent view; Agent Trace report
	The number of agents currently in the Available state or, in the Skill view, the number of agents in the Available state who possess the skill.	
Available Time	The amount of time agents were in the Available state during the time interval.	Real-time Agent Interval reports
Average Connected Time	The connected time divided by the number of calls that were connected during the time interval.	Real-time Skills Interval by Team
Average Handle Time	The average length of time spent handling a call (connected time plus wrap-up time, divided by number of calls).	Real-time Skills Interval by Team
Blind Transfer	The number of times an agent transferred an inbound call without consulting first.	Historical Agent Summary & Interval reports; ADR; Current Snapshot/Agent view; Agent Trace report
Calls Handled	The number of calls the agent handled (or, for the Skill view, the number of calls the agent handled for that skill) since logging in. Rest the cursor over a number in this column to display a pop-up showing the wrap-up codes the agent entered and how many times each code was entered.	Current Snapshot/ Team view & Skill view
	The total number of inbound and outdial calls handled.	
Channel	The media channel associated with the activity. (Appears only if your enterprise uses the Multimedia feature.)	ADR; Agent Trace report

Parameter	Description	Report
Conference	The number of times the agent initiated a conference call.	Historical Agent Summary & Interval reports; ADR; Current Snapshot/Agent view; Agent Trace report
Connected	The number of agents currently connected to an inbound call, or in the Skill view, the number of agents connected to a call who possess the skill.	Current Snapshot/ Site, Skill, & Skills by Team views
Connected Time	The amount of time inbound calls were connected to an agent during the time interval (talk time plus hold time).	Real-time Skills Interval by Team
Consult	Count. The number of times an agent answered a consult request plus the number of times an agent consulted other agents. Total Time. Total Consult Answer Time plus Total Consult Request Time. Average Time. (<i>Not in ADR or Agent Trace report</i>) The average length of consulting time (Total Consult Time divided by Consult Count).	Historical Agent Summary & Interval reports; ADR; Agent Trace report
Consult Answer	Count. The number of times an agent answered a consult request from another agent. Total Time. The total amount of time an agent spent answering consult requests from agents. Average Time. (<i>Not in ADR or Agent Trace report</i>) The average length of time agents spent answering consult requests (Total Consult Answer Time divided by Consult Answer Count). % Time. (<i>Only in ADR and Agent Trace report</i>) The percentage of time the agent spent answering consult requests.	Historical Agent Summary & Interval reports; ADR; Agent Trace report
Consult Request	Count. The number of times an agent sent a consult request to another agent. Total Time. The total amount of time an agent spent consulting other agents. Average Time. (<i>Not in ADR or Agent Trace report</i>) The average length of time agents spent consulting other agents (Total Consult Request Time divided by Consult Request Count). % Time. (<i>Only in ADR and Agent Trace report</i>) The percentage of time the agent spent consulting other agents while on an inbound call.	Historical Agent Summary & Interval reports; ADR; Agent Trace report
Consulting	The number of agents currently consulting with another agent.	Current Snapshot/ Site & Skills by Team views

Parameter	Description	Report
CTQ	The number of agents currently consulting with another agent after initiating or answering a consult-to-queue request.	Current Snapshot/ Site view
Current State	The agent's current state. See the table on page 174 for a description of each state that can appear in this column. In Team and Skill views, If the current state is Idle, the idle code the agent selected is shown in parentheses (no code is shown if the agent has just logged in and has not selected an idle code).	Current Snapshot/ Team, Skill, & Agent views
Disconnected Count	The number of calls that were connected to an agent, but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.	Historical Agent Summary & Agent Interval reports; ADR; Agent Trace report
Disconnected Hold Count	The number of times an inbound call was disconnected while the caller was on hold.	Current Snapshot/ Agent view
DN	The dial number the agent used to log in to the Agent Desktop.	Current Snapshot/ Team, Agent, & Skill views; ADR; Agent Trace report
Duration	The amount of time the agent was in the state.	Agent Trace Report
Final Logout Time	The date and time the agent logged out. This column appears only in agent-level summary reports.	Historical Agent Summary/Agent level
Hold	The number of agents in the Connected state who have placed the caller on hold.	Current Snapshot/ Site view & Skills by Team view
Hold Time	The amount of time callers were on hold during the time interval.	Real-time Skills Interval by Team

Parameter	Description	Report
Idle	The number of times the agent went into the Idle state from a different state. Rest the cursor over a number in this column to display a pop-up showing the idle codes the agent entered and how many times each code was entered. Note: Because an agent can change the idle code while in the Idle state, the number of idle codes displayed in the pop-up can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email.	Current Snapshot/ Team & Skill views
	The number of agents currently in the Idle state.	Current Snapshot/ Site & Skills by Team views
	Count. The number of times an agent went into the Idle state. Total Time. The total amount of time agents spent in the Idle state. Average Time. (<i>Not available in ADR or Agent Trace report</i>) The average length of time agents were in the Idle state (Total Idle Time divided by Idle Count). % Time. (<i>Not available in Agent Summary and Interval reports</i>) The percentage of time the agent was in the Idle state.	Historical Agent Summary & Interval reports; ADR; Agent Trace report
	Count. The number of times the agent went into the Idle state from a different state. Rest the cursor over the number in this field to see the idle codes the agent entered and how many times each code was used. Note: Because an agent can change the idle code while in the Idle state, the number of idle codes can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email. Total Time. The total amount of time the agent spent in the Idle state.	Current Snapshot/ Agent view
Idle Time	The amount of time agents were in the Idle state during the time interval.	Real-time Agent Interval reports
In Outdial	The number of agents who are connected to or are wrapping up an outdial call (a call made from the CC-One Agent Desktop by entering a phone number in the Call Out field).	Current Snapshot/ Site view & Skills by Team view
	The number of times the agent was connected to or was wrapping up an outdial call.	Current Snapshot/ Team view
In Time	The time the agent entered the state.	Agent Trace report

Parameter	Description	Report
Inbound	Reserved Time. The amount of time agents were in the Reserved state, during which incoming calls were ringing but had not yet been answered.	Real-time Agent Interval reports
	Answered Count. The number of inbound calls that were answered by an agent during the time interval.	
	Talk Time. The amount of time agents were talking on inbound calls during the time interval.	
	Hold Time. The amount of time inbound calls were on hold during the time interval.	
	Connected Time. The amount of time inbound calls were connected to an agent during the time interval (inbound talk time plus inbound hold time).	
	Wrap Up Time. The amount of time agents spent in the Wrap-up state after an inbound call during the time interval.	
	Average Connected Time. Inbound connected time divided by the number of inbound calls that were connected during the time interval.	
	Average Handle Time. The average length of time spent handling an inbound call (inbound connected time plus inbound wrap-up time, divided by number of inbound calls).	
Inbound Average Handle Time	The average length of time spent handling a call (total connected time plus total hold time and total wrap-up time, divided by connected count).	Current Snapshot/ Agent view
Inbound Avg Handle Time	The average length of time spent handling an inbound call (Total Inbound Connected Time plus Total Wrap Up Time, divided by Inbound Connected Count).	Historical Agent Summary & Interval reports; ADR; Agent Trace report

Parameter	Description	Report
Inbound Connected	<p>Hold Count. The number of times an agent put an inbound caller on hold.</p> <p>Connected Count. The number of inbound calls that were connected to an agent.</p> <p>Total Talk Time. The total amount of time an agent was talking with a caller.</p> <p>Total Hold Time. The total amount of time inbound calls were on hold.</p> <p>Total Time. The total amount of time agents were connected to inbound calls.</p> <p>Average Hold Time. <i>(Not in ADR or Current Snapshot/Agent view or Agent Trace report)</i> The average hold time for inbound calls (Total Hold Time divided by Hold Count).</p> <p>Average Time. <i>(Not in ADR or Current Snapshot/Agent view)</i> The average inbound connected time (Total Time divided by Connected Count).</p> <p>% Talk Time. <i>(Only in ADR and Agent Trace report)</i> The percentage of inbound connected time the agent was talking with the caller.</p> <p>% Hold Time. <i>(Only in ADR)</i> The percentage of inbound connected time the caller was on hold.</p> <p>% Time. <i>(Only in ADR)</i> The percentage of time the agent was connected to an inbound call.</p>	Historical Agent Summary & Interval reports; ADR; Current Snapshot/Agent view; Agent Trace report
Inbound Consult	<p>Count. The number of times an agent answered a consult request plus the number of times an agent consulted other agents.</p> <p>Total Time. Total Consult Answer Time plus Total Consult Request Time.</p>	Current Snapshot/Agent view
Inbound Consult Answer	<p>Count. The number of times an agent answered a consult request from another agent handling an inbound call.</p> <p>Total Time. The total amount of time an agent spent answering consult requests from agents handling inbound calls.</p>	Current Snapshot/Agent view
Inbound Consult Request	<p>Count. The number of times an agent sent a consult request to another agent during an inbound call.</p> <p>Total Time. The total amount of time an agent spent consulting other agents during inbound calls.</p>	Current Snapshot/Agent view
Inbound CTQ	<p>Count. Inbound CTQ Answer Count plus Inbound CTQ Request Count.</p> <p>Total Time. Total Inbound CTQ Answer Time plus Total Inbound CTQ Request Time.</p>	Current Snapshot/Agent view

Parameter	Description	Report
Inbound CTQ Answer	<p>Count. The number of times an agent answered a consult-to-queue request from an agent who was handling an inbound call.</p> <p>Total Time. The total amount of time an agent spent answering consult-to-queue requests from agents handling inbound calls.</p>	Current Snapshot/ Agent view; Historical Agent Summary & Interval reports; ADR
Inbound CTQ Request	<p>Count. The number of times an agent initiated a consult to queue while handling an inbound call.</p> <p>Total Time. The total amount of time between when an agent initiated consult-to-queue requests while handling inbound calls and when the consultations ended.</p>	Current Snapshot/ Agent view; Historical Agent Summary & Interval reports; ADR
Inbound Reserved	<p>Count. <i>(Not in ADR or Agent Trace report)</i> The number of times an agent went into the Inbound Reserved state, during which a call is coming in to an agent's station but has not yet been answered.</p> <p>Total Time. The total amount of time an agent spent in the Reserved state.</p> <p>Average Time. The average length of time agents were in the Inbound Reserved state (Total Available Time divided by Available Count).</p> <p>% Time. <i>(Only in ADR and Agent Trace report)</i> The percentage of time the agent was in the Inbound Reserved state.</p>	Current Snapshot/ Agent view
Inbound Transfers	The number of inbound calls the agent transferred to another agent, queue, or number.	Current Snapshot/ Agent view
Inbound Wrap Up	<p>Count. The number of times an agent went into the Wrap-up state after an inbound call.</p> <p>In the Current Snapshot/Agent view, you can rest the cursor over a number in this column to see the wrap-up codes the agent entered and how many times each code was used.</p> <p>Total Time. The total amount of time an agent spent in the Wrap-up state after an inbound call.</p> <p>Average Time. <i>(Not in ADR, Agent Trace report, or Current Snapshot/Agent view)</i> The average length of time agents were in the Wrap-up state after an inbound call (Total Wrap Up Time divided by Wrap Up Count).</p> <p>% Time. <i>(Only in ADR and Agent Trace report)</i> The percentage of time the agent was in the Wrap-up state after an inbound call.</p>	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Current Snapshot/Agent view
Initial Login Time	The date and time the agent logged in.	Historical Agent Summary/Agent level

Parameter	Description	Report
Login Count	Total number of times an agent logged in on that day. Appears only if Agents is selected in the Display Results By drop-down list.	Historical Agent Summary/Agent level
Login Time	The date and time the agent logged in to the Agent Desktop.	Current Snapshot/ Team, Agent, & Skill views; ADR; Agent Trace report
Logout Time	The date and time the agent logged out of the Agent Desktop.	ADR; Agent Trace report
Not Responding	The number of agents currently in the Not Responding state.	Current Snapshot/ Site & Skills by Team views
	<p>Count. The number of times an agent was in the Not Responding state.</p> <p>Total Time. The total amount of time an agent spent in the Not Responding state.</p> <p>Average Time. (<i>Not in ADR or Current Snapshot/ Agent view or Agent Trace report</i>) The average length of time agents were in the Not Responding state (Total Not Responding Time divided by Not Responding Count).</p> <p>% Time. (<i>Only in ADR and Agent Trace report</i>) The percentage of time the agent was in the Not Responding state.</p>	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Current Snapshot/Agent view
Not Responding Time	The amount of time agents spent in the Not Responding state during the time interval.	Real-time Agent Interval reports
Number of Calls	The number of inbound calls that were connected to the site or team during the time interval.	Real-time Skills Interval by Team
Occupancy	The measure of time the agent spent on calls compared to available and idle time, calculated by dividing total connected time (inbound connected time plus outdial connected time) plus total wrap up time (inbound wrap up time plus outdial wrap up time) by staff hours.	Current Snapshot/ Agent view; Real-time Agent Interval reports; Historical Agent Summary, Agent Interval, ADR, & Agent Trace report
	The measure of time the agent spent on calls compared to available and idle time, calculated by dividing inbound connected time plus inbound wrap up time by staff hours.	Real-time Skills Interval by Team
Out Time	The time the agent left the state.	Agent Trace report

Parameter	Description	Report
Outdial	Attempted. The number of calls that agents initiated during the time interval.	Real-time Agent Interval reports
	Connected. The number of outdial calls that were connected to an agent during the time interval.	
	Reserved Time. The amount of time agents were in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet.	
	Talk Time. The amount of time agents were talking on outdial calls during the time interval.	
	Hold Time. The amount of time outdial calls were on hold during the time interval.	
	Connected Time. The amount of time outdial calls were connected to an agent during the time interval (outdial talk time plus outdial hold time).	
	Average Connected Time. Outdial connected time divided by the number of outdial calls that were connected during the time interval.	
	Wrap Up Time. The amount of time agents spent in the Wrap-up state after an outdial call during the time interval.	
	Average Handle Time. The average length of time spent handling an outdial call (outdial connected time plus outdial wrap up time, divided by number of outdial calls).	
Outdial Avg Handle Time	The average length of time spent handling an outdial call (Total Outdial Connected Time plus Total Outdial Wrap Up Time, divided by Outdial Connected Count).	Historical Agent Summary, Agent Interval, ADR, & Agent Trace report
Outdial Conference	The number of outdial calls the agent conferenced with another party.	Current Snapshot/ Agent view

Parameter	Description	Report
Outdial Connected	<p>Attempted Count. The number of times an agent attempted to make an outdial call.</p> <p>Connected Count. The number of outdial calls that were connected to an agent.</p> <p>Hold Count. The number of times an agent put an outdial call on hold.</p> <p>Total Talk Time. The total amount of time an agent was talking with a party on an outdial call.</p> <p>Total Hold Time. The total amount of time outdial calls were on hold.</p> <p>Total Time. The total amount of time agents were connected to outdial calls.</p> <p>Average Hold Time. <i>(Not in ADR, Agent Trace report, or Current Snapshot/Agent view)</i> The average hold time for outdial calls (Total Hold Time divided by Hold Count).</p> <p>Average Time. <i>(Not in ADR, Agent Trace report, or Current Snapshot/Agent view)</i> The average outdial connected time (Total Time divided by Connected Count).</p>	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Current Snapshot/Agent view
Outdial Consult	<p>Count. Outdial Consult Answer count plus Outdial Consult Request count.</p>	Current Snapshot/Agent view
	<p>Total Time. Total Outdial Consult Answer Time plus Total Outdial Consult Request Time.</p>	
Outdial Consult Answer	<p>Count. The number of times the agent answered a consult request from another agent who was on an outdial call.</p>	Current Snapshot/Agent view
	<p>Total Time. The amount of time the agent was consulted by another agent who was on an outdial call.</p>	
Outdial Consult Request	<p>Count. The number of times the agent consulted another agent while on an outdial call.</p>	Current Snapshot/Agent view
	<p>Total Time. The amount of time the agent consulted another agent during an outdial call.</p>	
Outdial CTQ	<p>Count. Outdial CTQ Answer Count plus Outdial CTQ Request Count.</p>	Current Snapshot/Agent view
	<p>Total Time. Total Outdial CTQ Answer Time plus Total Outdial CTQ Request Time</p>	
Outdial CTQ Answer	<p>Count. The number of times an agent answered a consult-to-queue request from an agent who was handling an outdial call.</p> <p>Total Time. The total amount of time an agent spent answering consult-to-queue requests from agents handling outdial calls.</p>	Current Snapshot/Agent view; Historical Agent Summary & Interval reports; ADR

Parameter	Description	Report
Outdial CTQ Request	<p>Count. The number of times an agent initiated a consult to queue while handling an inbound call.</p> <p>Total Time. The total amount of time between when an agent initiated consult-to-queue requests while handling inbound calls and when the consultations ended.</p>	Current Snapshot/ Agent view; Historical Agent Summary & Interval reports; ADR
Outdial Reserved	<p>Count. The number of times an agent was in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet.</p> <p>Total Time. The total amount of time an agent was in the Outdial Reserved state.</p> <p>Average Time. (<i>Not in ADR, Agent Trace report, or Current Snapshot/Agent view</i>) The average amount of time agents were in the Outdial Reserved state (Total Time divided by Count).</p>	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Current Snapshot/Agent view
Outdial Transfers	The number of outdial calls the agent transferred to another agent, queue, or number.	Current Snapshot/ Agent view
Outdial Wrap Up	<p>Count. The number of times an agent went into the Wrap-up state after an outdial call.</p> <p>Total Time. The total amount of time an agent spent in the Wrap-up state after an outdial call.</p> <p>Average Time. (<i>Not in ADR, Agent Trace report, or Current Snapshot/Agent view</i>) The average length of time agents were in the Wrap-up state after an outdial call (Total Outdial Wrap Up Time divided by Outdial Wrap Up Count).</p>	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Current Snapshot/Agent view
Queue	If the agent is currently handling a call, the name of the queue that the call came in on.	Current Snapshot/ Team, Agent, & Skill views

Parameter	Description	Report
Reason	<p>The reason the agent logged out. For example:</p> <ul style="list-style-type: none"> • Desktop browser closed. The browser window in which the Agent Desktop application was running was closed while the agent was logged in. • LoggingInAnotherInstance. The system logged the agent out because the agent logged in to another instance of the Agent Desktop. • Lost network connection. The agent was logged out because of a network interruption that exceeded two minutes (unless a different timeout is specified for your system). • Normal logout. The agent clicked the Log Out button in the Agent Desktop window. • Operational logout. The system logged the agent out in response to a command initiated by BroadSoft Operations or Technical Support. • Supervisory logout. The supervisor logged the agent out. <p>Other reasons can occasionally occur.</p>	ADR; Agent Trace report
Reserved	The number of agents currently in the Reserved state, during which a call is coming in but has not yet been answered.	Current Snapshot/ Site view & Skills by Team view
	The number of agents in the Reserved state who possess the skill.	Current Snapshot/ Skill view
Site	<p>The name of a site.</p> <p>If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the a collapse arrow (▼) or expand arrow (▶) to the left of a team name to collapse or expand the data grouped by channel type.</p> <p>In the Site view of a current snapshot agent report, you can do the following:></p> <ul style="list-style-type: none"> • Click a collapse arrow (▼) or expand arrow (▶) next to a site name to collapse or expand the list of logged-in teams at the site. • Click the name of a team to drill-down to the Team view for that team. 	Current Snapshot/ Site view; Real-time Agent Interval reports (except Agent-level)
	The site where the team the agent was handling calls for is located.	ADR; Agent Trace report

Parameter	Description	Report
Skill	<p>The name of the skill.</p> <p>In the Skill view of the current snapshot agent report you can do the following:</p> <ul style="list-style-type: none"> • Click a collapse arrow (▼) or expand arrow (►) next to a skill name to collapse or expand the list of logged-in agents who possess the skill. • Click the name of an agent to drill-down to the Agent view for that agent. • If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse or expand arrow to the left of an agent name to collapse or expand the data grouped by channel type. 	Current Snapshot/Skill view; Real-time Skills Interval by Team
Staff Hours	The amount of time the agent has been logged in.	Current Snapshot/Team, Agent, & Skill views
	The amount of time the agent was logged in during the time interval.	Real-time Agent Interval reports & Skills Interval by Team
	The total amount of time agents were logged in.	Historical Agent Summary & Interval reports
	The amount of time the agent was logged in during each login session.	ADR; Agent Trace report

Parameter	Description	Report
State	<p>The time the agent logged in and logged out and each state the agent was in during the login session:</p> <ul style="list-style-type: none"> • Available. The agent was available and waiting for calls. • Conference. The agent conferenced a call with another party. • Consult-Answer. The agent answered a consult request from another agent. • Consult-Request. The agent initiated a consultation with another agent. • Idle. The phone rang but was not answered within a specified period of time. • Not Responding. The agent's phone rang but the agent did not answer within a specified period of time. • Hold. The agent placed a connected call on hold. • Talk. The agent was talking on an inbound call. <p>Wrap Up. The call ended but the agent was not ready for the next call.</p>	Agent Trace report
Talk	The number of agents in the Connected state who are currently talking with a caller.	Current Snapshot/ Site & Skills by Team views
Talk Time	The amount of time agents were talking with callers during the time interval.	Real-time Skills Interval by Team

Parameter	Description	Report
Team	<p>The name of a team in the report.</p> <p>In the Team view and Skills by Team view of a current snapshot agent report you can do the following:</p> <ul style="list-style-type: none"> Click a collapse arrow (▼) or expand arrow (►) next to a team name to collapse or expand the list of logged-in agents on the team. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the a collapse or expand arrow to the left of an agent name to collapse or expand the data grouped by channel type. <p>In the Team view, you can click the name of an agent to drill-down to the Agent view for that agent.</p>	Current Snapshot/ Team view & Skills by Team view; Real-time Agent Interval report/Team & Skills by Team level
	The team the agent was handling calls for.	ADR; Agent Trace report
Time in Current State	The amount of time the agent has been in the current state.	Current Snapshot/ Team, Agent, & Skill views
Total Calls	Inbound Answered calls plus Outdial Attempted calls.	Real-time Agent Interval reports
Total Logged In	The number of agents currently logged in or, in the Skill view, the number of agents currently logged in who possess the skill	Current Snapshot/ Site, Team, Skill, & Skills by Team views
Channels Logged In	The number of media channels to which agents are currently logged in. Appears only if your enterprise uses the Multimedia feature.	Current Snapshot/ Site, Team, Skill, & Skills by Team views
Wrap Up	The number of agents currently in the Wrap-up state.	Current Snapshot/ Site & Skills by Team view
Wrap Up Time	The amount of time agents spent in the Wrap-up state after an inbound call during the time interval.	Real-time Skills Interval by Team

Historical Skill Report Parameters

The parameters available in CC-One historical Skills by Queues reports are described in the following table. Asterisks (*) mark parameters that are available only in a skill summary report, which you can display by drilling down on a skill name in a Skills by Queue report.

Parameter	Description	
% Calls Matched	The percentage of calls for which the initial value of the skill required by the call was equal to the final value when the call was distributed to an agent. (Matched Calls * 100) / (Connected + Abandoned + Reclassified)	Skills by Queue
Abandoned	The number of calls with this skill requirement that were abandoned during the report interval.	Skills by Queue
Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for this skill.	Skills by Queue
Avg Handle Time	The average length of time spent handling a call with this skill requirement (total connected time plus total wrap-up time, divided by calls handled).	Skills by Queue & Skills by Agents
Connected	The number of calls with this skill requirement that were connected during the report interval.	Skills by Queue & Skills by Agents
Connected within SL	The number of calls with this skill requirement that were connected within the Service Level threshold provisioned for this skill.	Skills by Queue & Skills by Agents
Final Operand*	The skill operand type that was assigned to the call when it was distributed to an agent with a matching skill.	Skills by Queue
Final Value*	The value of the skill requirement assigned to the call when the call was distributed to an agent.	Skills by Queue
Initial Operand*	The skill operand type that was assigned to the call when it was distributed to the queue. Possible values: <ul style="list-style-type: none"> • eq (equal to) • neq (not equal to) • gte (greater than or equal to) • lte (less than or equal to) 	Skills by Queue
Initial Value*	The value of the skill requirement assigned to the call when it arrived in the queue.	Skills by Queue

Parameter	Description	
Operand	The skill operand type that was assigned to the call when it was distributed to the agent. Possible values: <ul style="list-style-type: none"> • eq (equal to) • neq (not equal to) • gte (greater than or equal to) • lte (less than or equal to) 	Skills by Agents
Reclassified	The number of calls with this skill requirement that were transferred from the queue by the system.	Skills by Queue
Reclassified within SL	The number of calls with this skill requirement that were transferred from the queue by the system within the Service Level threshold provisioned for the skill.	Skills by Queue
Skill	The name of a skill. In a Skills by Queue report, you can click an entry in this column to drill down to view daily activity for the month (from a monthly summary) or to view half-hourly data for a day (from a daily summary).	Skills by Queue Skills by Agents
Total	The total number of calls.	Skills by Queue
Value	The value of the skill requirement assigned to the call when the call was distributed to the agent.	Skills by Agents

Historical Threshold Alerts Report Parameters

If your enterprise uses the threshold alerts feature and your user role authorizes you to view alerts, you can use the controls on the Threshold Alerts page of the Historical Reports module to display details about threshold alerts that were triggered between midnight of the current day and three months ago. Available parameters are described in the following table.

Parameter	Description
Acknowledged	Whether or not a supervisor acknowledged the alert.
Acknowledged Time	The time the alert was acknowledged.
Actual Value	The actual value that triggered the alert.
Archived	Whether or not a supervisor archived the alert.
Comments	Optional comments, if any, entered by the supervisor who acknowledged the alert.
Metric	The metric that the threshold is associated with.

Parameter	Description
Operand	> (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to)
Supervisor	The name of the supervisor who acknowledged the alert.
Time	The date and time that the threshold alert was triggered
Trigger Interval	The number of seconds specified in the threshold rule as the interval during which the system should generate only one alert for the threshold rule check.
Trigger Value	The value that the threshold rule defined as the trigger.

Usage Metrics Report Parameters

Parameters available in the Usage Metrics Report are described in the following table.

Column	Description
Calls Duration (min)	The total amount of time between when inbound calls arrived or outdial calls were placed and when they were terminated.
Inbound	Total Calls. The total number of inbound calls. Connected Calls. The number of inbound calls that were connected to an agent. IVR Duration (min). The number of minutes during which calls were in the IVR system. Queue Duration (sec). The number of seconds during which calls were in a queue. Talk Time (min). The number of minutes during which agents were talking with callers. Hold Time (min). The number of minutes during which inbound calls were on hold.
Month	The month during which the call activity occurred.
Outdial	Total Calls. The total number of outdial calls. Connected Calls. The number of outdial calls that were connected to an agent. Talk Time (min). The number of minutes during which an agent was talking with a party on an outdial call. Hold Time (min). The number of minutes during which outdial calls were on hold.
Recorded Calls	The number of calls that were recorded.
Total Calls	The total number of inbound and outdial calls.



Glossary

abandoned call. A phone call that was in the system longer than the predefined Short Call threshold provisioned for the enterprise, but that was terminated before being distributed to a destination site. See also *Short Call threshold*. Contrast with *short call*.

ACD. See *automatic call distributor (ACD)*.

ACT (average connected time). The average amount of time callers were connected to an agent.

ADR. See *agent detail record (ADR)*.

agent. A person who answers customer calls; also referred to as a *customer service representative*.

agent-based team. A team that has a specific number of agents assigned to it. These agents use the CC-One Agent Desktop to interface with the CC-One system. See also *CC-One Agent Desktop*. Contrast with *capacity-based team*.

Agent Desktop. See *CC-One Agent Desktop*.

agent detail record (ADR). A record representing details about an agent's activities during an agent session (that is, the time interval between when the agent logged in and logged out).

agent profile. A group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies permission levels relating to queue transfers, agent consults and transfers (“buddy teams”), wrap-up and idle codes, wrap-up time-out values, and agent auto-available.

ANI. See *Automatic Number Identification (ANI)*.

answered call. A call that was routed from the queue to an agent or available resource and was answered by the agent or connected to a resource.

ASA. See *average speed of answer (ASA)*.



automatic call distributor (ACD). A system or application software program that serves to route incoming calls to the most available and appropriate agent or resource according to customer-defined routing requirements.

Automatic Number Identification (ANI). A system utilized by telephone companies to identify the phone number of a calling subscriber.

auxiliary codes. Idle and wrap-up codes that agents can select while using the CC-One Agent Desktop. See also *idle code*, *wrap-up code*.

Available state. An agent state indicating that the agent is ready to take calls.

average speed of answer (ASA). The average amount of time callers waited in queue before being connected to an agent.

barge in. To join a call while monitoring or coaching an agent in order participate in the conversation between the agent and the customer.

call-associated data (CAD) variable. A named variable provisioned for the enterprise that can be used in a call control script to collect data entered either by a caller or an agent. CAD values are stored in the cumulative call detail records that CC-One Management Portal users can display and export to Microsoft Excel or .csv files.

call control script. A set of instructions for controlling the flow of calls through the CC-One system. Call control scripts are assigned to routing strategies.

call detail record (CDR). A record representing the history of a call within an entry point or queue. An entry point CDR stores details about the call from the time it arrived at the entry point—either as a new, external call or as a call transferred from another entry point or queue—until it left the underlying queues either by terminating or by being transferred out of a queue to another entry point. A queue CDR stores information about the call from the time it entered the queue until it was either terminated or transferred out of the queue. A queue CDR can have multiple legs, which are represented by segment detail records (SDRs). See also *segment detail record (SDR)*.

capacity-based team. A team that does not have specific agents assigned to it, and the agents do not use the CC-One Agent Desktop. For example, an outsourcer might have teams that use a PBX or an ACD to handle calls. A capacity-based team might be used to represent a voice mailbox or an agent group that is not managed by the CC-One system. The capacity of such a team is determined by the Capacity setting provisioned for it, which can be overwritten by team capacity strategies defined in the CC-One Routing Strategy module available from the CC-One Management Portal. See also *CC-One Agent Desktop*. Contrast with *agent-based team*.

CCDR. See *cumulative call detail record (CCDR)*.

CC-One Agent Desktop. A browser-based application for handling customer interactions on the agent's workstation. Using the Agent Desktop and any telephony device including traditional TDM, mobile or soft IP-based phones, agents have access to a full suite of call center applications.

CC-One Management Portal. The Web-based user interface that provides authorized users with access to CC-One features and functions.

CC-One Scorecard Routing. A BroadSoft CC-One offering that provides cross-ACD call routing. In Scorecard Routing, calls arriving at an entry point can be routed to queues across multiple ACDs. The queues receiving the calls can belong to CC-One or non-CC-One ACDs. Calls sent to an external ACD are distributed to agents by the external ACD. BroadSoft CC-One uses proxy queues to track the call activity that occurs on those external ACD queues. See also *proxy queue*.

CDR. See *call detail record (CDR)*.

coach. To speak to the agent handling a call without being heard by the customer. Also known as *whisper coach*.

completed call. A call that ended during the report interval. This includes answered, disconnected, and abandoned calls, but not short calls or transferred calls.

Connected state. An agent state indicating that the agent is connected with a caller.

cross-ACD entry point. An entry point used in CC-One Scorecard Routing. Calls that arrive at a cross-ACD entry point can be routed to queues across multiple ACDs. Calls sent to an external ACD are distributed to agents by the external ACD. See also *entry point*, *proxy queue*, *CC-One Scorecard Routing*.

cumulative call detail record (CCDR). A record representing the complete life cycle of an external call, from the time it arrived in the CC-One system until it was terminated. A CCDR can include one or more CDRs and SDRs. See also *call detail record (CDR)*, *segment detail record (SDR)*.

Dialed Number Identification Service (DNIS). A service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.

disconnected call. A call that was terminated within the predefined Sudden Disconnect threshold provisioned for the enterprise after being distributed to a destination site. See also *Sudden Disconnect threshold*.

DN. Dial number, the number that is dialed to initiate a call.

DNIS. See *Dialed Number Identification Service (DNIS)*.

enterprise. An organization that subscribes to the CC-One service. Also referred to as the CC-One *tenant*.

entry point. The initial landing place for customer calls on the CC-One system. One or more toll-free or dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

handled call. A call that was terminated after reaching the destination site and exceeding the predefined Sudden Disconnect threshold provisioned for the enterprise. The total number of handled calls is determined by subtracting the number of disconnected calls from the number of answered calls. See also [answered call](#), [disconnected call](#), [enterprise](#).

idle code. A value that an agent selects while using the CC-One Agent Desktop to indicate why the agent is not available to take calls, such as *Lunch*, *Break*, or *Meeting*. See also [CC-One Agent Desktop](#).

Idle state. An agent state indicating that the agent is logged in but not yet ready to take customer calls.

IVR. Interactive voice response.

IVR call. A call that was successfully put through to the IVR system.

IVR time. The cumulative amount of time calls were in the IVR system, waiting to be handled.

Jukebox. A CC-One module that can be used to search for and play audio files recorded through the optional CC-One Call Recording feature.

Management Portal. See [CC-One Management Portal](#).

MED. Minimum expected delay, a value that represents the smallest expected time interval between the routing of a call to a queue and answering of the call by an agent resource. The routing engine calculates the MED of each queue based on the depth of the queue and the average handle time (AHA) during the most recent time interval.

multimedia profile. A group of settings that specify the types and number of contacts an agent can handle concurrently. Multimedia profiles can be assigned to sites, teams, or individual agents. When Multimedia is enabled, each agent-based team at a site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team's profile unless the agent is assigned a different multimedia profile.

Midpoint Call Management[®] gateway. CC-One Communication's centralized control point for managing and monitoring calls across a heterogeneous call center environment. The CC-One solution creates a virtual point for visibility and control, enabling enterprises to remotely manage their global call center queues while providing improved bandwidth usage. It also provides a view into real-time and historical performance system wide, allowing service levels to be optimized across sites.

Not Responding state. An agent state indicating that the agent's phone rang but was not answered within a predefined period of time.

outdial call. A call made from the CC-One Agent Desktop by entering a phone number in the Call Out field.

Outdial Reserved state. An agent state indicating that the agent has initiated an outdial call, but the call is not connected yet.

overflow number. A destination phone number, provisioned for the queue, to which a call is sent if it has been queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent.

proxy queue. A queue that represents an external ACD. In CC-One Scorecard Routing, calls that are sent to an external ACD are distributed to agents by the external ACD. CC-One uses proxy queues to track the call activity occurring on the external ACD queues. There is no agent visibility or agent reporting for proxy queues. See also [CC-One Scorecard Routing](#).

queue. A holding place for calls while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agents. See also [entry point](#).

queued call. A call that has been queued to music-on-hold or customer messaging information while waiting to be sent to a destination site.

Reserved state. An agent state indicating that a call is coming through to the agent's station.

SBR. See [skills-based routing](#).

Scorecard Routing. See [CC-One Scorecard Routing](#).

SDR. See [segment detail record \(SDR\)](#).

segment detail record (SDR). A record representing one leg of a call. When an agent transfers a call to another agent, two SDRs are created—one for each leg of the call. See also [call detail record \(CDR\)](#), [cumulative call detail record \(CCDR\)](#).

service level. The percentage of calls for a queue or skill that were distributed to a site and were answered by agents within the predefined Service Level threshold provisioned for the queue or skill. Abandoned calls are included in service-level calculations. See also [skill](#).

Service Level threshold. A threshold provisioned for a queue or skill that is used to calculate service level values. If a call is completed within the time interval set for this threshold, it is considered to have been handled within service level. See also [service level](#).

short call. A call that was terminated within the predefined Short Call threshold provisioned for the enterprise before being distributed to a destination site. See also [Short Call threshold](#). Contrast with [abandoned call](#).

Short Call threshold. The time interval, provisioned for the enterprise, that determines whether a call is considered *short* or *abandoned*. Calls that are terminated before being distributed to a destination site but within this time threshold are counted as short rather than abandoned. The default is 5 seconds. See also [abandoned call](#), [short call](#).

site. A physical call center location under the control of the enterprise. For example, an enterprise named *Acme* might have sites in Chicago, Manila, and Bangalore.

skill. An area of agent expertise, such as language fluency or product expertise, that can be used in skills-based routing to determine which calls an agent can receive. See also [skill profile](#), [skills-based routing](#).

skill profile. A set of skills, each with an assigned value, that can be assigned to a team or an individual agent. If a skill profile is assigned to a team, each agent logged in to that team is associated with that skill profile unless the agent is assigned a specific skill profile. See also [skill](#), [skills-based routing](#).

skills-based routing. An optional CC-One feature that matches the needs of callers with agents who have the skills to best meet those needs. When calls arrive at an entry point, they are classified into subsets that can be routed only to agents who possess a requisite set of skills, such as language fluency or product expertise. See also [skill](#), [skill profile](#).

Sudden Disconnect threshold. The time interval, provisioned for the enterprise, that determines whether a call is considered *handled* or was terminated so quickly as to possibly indicate an issue with connectivity or agent behavior. A call that is terminated after being distributed to a destination site, but within this time threshold, is considered to be a *disconnected* call.

talk time. The time interval during which the agent is talking to the caller. This does not include time the call is on hold.

team. The logical entity responsible for handling calls to a given queue. An agent can be assigned to multiple teams for selection; however, an agent can log in to only one team at a time. See also [queue](#).

tenant. An enterprise that subscribes to the CC-One service.

terminated call. A call that ends generally either because the caller or agent has hung up the connection.

ticker. The scrolling text area at the top of the CC-One real-time pages. The ticker can be customized to display the key performance indicators that are most important to the enterprise's operations.

user. A person who accesses the CC-One service, typically a call center manager, telecom manager, customer care executive, or other representative of the enterprise.

UTC. Coordinated Universal Time. Also known as *Universal Time Coordinate*. The standard time common throughout world, UTC is essentially the same as Greenwich Mean Time.

virtual team. A holding place for customer and outdial calls. There are six types of virtual teams—entry points, queues, outdial entry points, outdial queues, cross-ACD entry points, and proxy queues. See also [entry point](#), [queue](#), [cross-ACD entry point](#), [proxy queue](#).

work type. A value assigned to idle or wrap-up codes and used to group the codes in auxiliary reports. See also [idle code](#), [wrap-up code](#).

wrap-up code. A value that an agent selects while using the CC-One Agent Desktop to indicate information about the disposition of each call after it ends—for example, *Sale*, *Transferred*, *Case Completed*. See also [CC-One Agent Desktop](#).

Wrap-up state. An agent state indicating that a call has ended, but the agent is not ready for the next call, typically because the agent is entering a wrap-up code or performing other after-call tasks.

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