Mitel Connect Agent Manager Help

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Mitel Connect Agent Manager is used by managers and supervisors to obtain real-time statistical information concerning contact center activities. The information can be displayed in tables, forms, and graphic formats, providing a clear picture of what is going on in your contact center.Agent Manager also enables supervisors to adjust their resources by adding or removing agents from groups.Real Time reports are used to perform the following functions:

- Present statistical data on call center activity in real time.
- Manage agents.
- React to changing situations.

Real-time Reports

This type of report includes:

- **Real-time information** — Real-time information is what is currently happening in the contact center. (This may include the number of calls in the queue, the average and maximum waiting time for queued calls, etc.)
- **Statistics on the current interval** — each group is assigned an "Interval Time." The real-time statistic is calculated over this interval. (This interval may also be called "Slide Time Interval".) The data is continually updated so that the latest information for the current time interval is always displayed. For example, if the time interval defined is one hour and the time is currently 10:30, the data presented will be for the time period 9:30 - 10:30. At 9:35, for example, the data presented will be for the time period 8:35 - 9:35.
- **Statistics on the previous interval** — Statistical information that was calculated during the real-time interval previous to the current interval. For example, at 10:35, the previous interval would be the time period between 8:35 to 9:35.

Refer to Mitel Connect Agent Manager Field Reference for reference information for the fields you can add to real-time reports.

Daily Summary Reports

This type of report includes:

- **Real-time information** — That is, what is currently happening in the call center, (This may include the number of calls in the queue, the average and maximum waiting time for queued calls, and so forth.)
- **Statistics since last midnight** — The real-time statistic collected during the current day starting at midnight.

The data continually updated so that the latest information for today is always displayed. For example, at 10:30, the data presented summarizes the information since last midnight until the current time.

Refer to Mitel Connect Agent Manager Field Reference for reference information for the fields you can add to real-time reports.

Hourly Summary Reports

Hourly reports do not accumulate statistics in real-time, but display reports based on hourly intervals (i.e., the number of times, within a twenty-four hour period, that a supervisor' hourly reports are updated). An hourly report is a tabular report in which each line displays the data for a specific hourly interval. The last line of the report displays the totals. Each time an hourly interval is completed, a new line is added to the report. All hourly reports are re-started at midnight.Real-time data is presented in Report Windows.Agent Manager is implemented using dynamic reports that reflect actual contact center activity.To work with reports in the system, it is important to understand the difference between a report window, and a report template.Refer to Mitel Connect Agent Manager Field Reference for reference information for the fields you can add to real-time reports.

Report Windows

The requested information is displayed in a report window. The displayed information is dynamic in real-time reports, constantly changing according to actual contact center activity.The format and content of information displayed in report windows is based on predefined templates, described in the following section. The report name, as well as the name of the template it based on are appearing in the report title.There are two types of report windows: public and private. Public reports are available to all the supervisors who are allowed to access Agent Manager.Private reports are available only to the supervisor who created the report.Supervisors must be authorized to save public report windows. With the proper authorization, supervisors can select the public or private option, or both.

Report Templates

A report template is the "blueprint" for the information displayed in the report window.The application includes a set of predefined real-time report templates (default templates). The parameters of each template can be configured according to what information is desired in the generated report window.This section includes descriptions of all templates as well as step-by-step instructions for creating all types of real-time reports and converting them to a window are also presented.By default, Agent Manager specifies thresholds for real-time group activity. Information on this activity is displayed by running specific reports. When the activity, such as number of calls in queue, reaches or exceeds a threshold, you receive an alert. The data in the report is usually highlighted in either yellow or red when a threshold is reached. Thresholds are defined using the Mitel Connect Contact Center Director
> **Groupings** > **Groups** > **Thresholds** tab.In addition to a color indicator, an audible alert is available. This alert can either be a system beep or a sound from a WAV file, and it can be configured to play once or continuously for a specified period of time. Alerts are configured using Mitel Connect Contact Center Director > **Supervisors** > **Alerts**.Agent Manager provides two default files used as the audible alerts, warning.wav and alarm.wav. When data meets or exceeds the "yellow" threshold level, the sound in the warning.wav file is used. The alarm.wav file sounds when the data meets or exceeds the "red" threshold level. You can use custom alerts by recording or using an existing WAV file. Save your custom sounds in the Supervisor\Bin folder of your Contact Center directory with the filename custom_warning.wav and custom_alarm.wav.Contact your system administrator to implement or change threshold levels for specific group activities. In order to use audible alerts, your system must be configured for this feature. Check with your system administrator if you have questions about using or implementing audible alerts.

Changing Agent Group Assignments

Agent Manager's Login Manager enables you to change the group assignment of agents currently working in the call center. The Login Manager has two optional views: Agent Login Status and Group Login Status. In the Agent Login Status view, you can see an agent's current group assignment. You can then add or remove groups to and from the agent. The Group Login Status view allows you to see the agents currently logged into a specific group. You can then add or remove agents to and from the group.To open the Login Manager, do one of the following:

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

The Agents Login Status tab contains the following items:

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

The Groups Login Status tab includes the following items:

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

You can create a new real-time report for current information on your call center.If you want to generate reports on call activity in an IVR Application, you first need to specify the associated DNIS. Refer to DNIS Information for Voice Call Activity for more information.

Creating a Real-Time Report

To create a new report:

1. From the **File** menu, click **New**. You can also click the **New** icon on the Toolbar. The New dialog box appears.
2. From the **Report Type** drop-down list, click the report type you want.
3. Select the template from the **Template Name** list, and click **OK**. The appropriate New Entity dialog box appears.
4. You can change the sort order of the entities in the list to more easily find the entity you want. To do so, click the entity title. Entities listed alphabetically are displayed in reverse alphabetical order; entities listed by number are displayed in reverse numerical order.
5. Select the required entity, and click **OK**.The selected Report window appears. The window title bar indicates that the report is untitled, and displays the name of the template on which the report is based.

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

Opening an Existing Real-Time Report

To open an existing real-time report:

1. From the **File** menu, click **Open**. You can also click the **Open** icon on the Toolbar. The Open dialog box appears.
2. To narrow the list of reports displayed, select **Public** or **Private** (both options can be selected), and from the **Report Type** drop-down list, select the report type.
3. Select the report to open, and click **OK**.

Modifying Real-Time Reports

Once you have create a real-time report, you can modify the report to reflect the data you want to see. Refer to the following pages for additional information.

- Generating Reports Based on One Entity
- Generating Reports for Multiple Entities
- Reordering the Items in a Report

A report can be saved in both the public and private report lists. All authorized supervisors can view public reports, but private reports are viewable only by the supervisor that created them.

Saving a Real-Time Report

To save a real-time report:

1. To save a report with its current properties, from the **File** menu, click **Save**. You can also click the Save icon on the Toolbar. If the current report has not yet been saved, the **Save** button is disabled.
2. To save a report under a different name, or to save a private report as public (or the reverse), from the **File** menu, click **Save As**.

You can also click the **Save As** icon on the Toolbar. The Save As window opens. Use the Save As dialog box to specify the name and location of the report.

Setting the Refresh Rate

The refresh rate defines how often Agent Manager requests an update from the server. By default, the refresh rate is one second. You can instead set a refresh rate that is automatically determined based on the network load, or set a specific rate.If an activity begins and ends before the next update of information, this activity is not reported in the report. For example, if the refresh rate is 5 seconds and an agent speaks on a call for 3 seconds, this call is counted as a call but there will be no change in the agent state.To set the refresh rate:

1. From the **Tools** menu, click **Refresh Rate**.

- If you want the system to automatically set the refresh rate depending on the load of the network, choose **Automode**.

- If you want to set a specific refresh rate, choose **Manual Mode**. The Refresh Rate dialog box opens.

1. Select the refresh rate in seconds, and click **OK**. If the manually set refresh rate is determined by the system to be insufficient for the current network load, the system automatically increases the rate to a more efficient number (e.g., 5 seconds to 7 seconds).

Saving a Workspace

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

1. Open, create, modify, and place the reports you want to automatically see each time you start Agent Manager. You can use the commands from the Windows menu to place and order the reports in a layout you want.
2. Click **File** > **Workspace** > **Save As Default**. The layout is saved as your default workspace.
3. You can always revert to your default workspace by clicking **File** > **Workspace** > **Restore Default**.

Generating Reports

If you want to generate reports on voice call or email activity in an IVR Application, you first need to specify the associated DNIS.A DNIS number is a series of digits that identifies to Contact Center the number that was dialed by the caller. The DNIS number is used to collect statistics on the Contact Center activity that is routed through specific entry points that a customer dials.

Generating Reports for Voice Calls

For voice calls, to specify a DNIS for an IVR application:

1. In Contact Center Director, select **Routing** > **DNIS**.
2. To create a new DNIS, click **New** and enter the appropriate DNIS information. Refer to DNIS Information for Voice Call Activity for more information.
3. Click **Create**.To edit an existing DNIS, from the **List View** select the DNIS enter the appropriate information. Click **Save**.

Generating Reports for Emails

For emails, to specify a DNIS for an IVR application:

1. From Contact Center Director, select **Email** > **Email DNIS**.
2. To create a new email DNIS, click **New** and enter the appropriate DNIS information. Refer to DNIS Information for Email Activity for more information.
3. Click **Create**.

To edit an existing DNIS, select the DNIS record you want to modify in the List View, enter the appropriate information, and click **Save**.

Generating Reports Based on One Entity

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

1. In an open report, click **Contents** > **Change**. You can also click the **Change** icon on the Toolbar. The Change Entity dialog box appears, listing the entities not included in the report.
2. To change the sort order of the entities in the list to more easily find the entity you want, click the entity title. Entities listed alphabetically are displayed in reverse alphabetical order; entities listed by number are displayed in reverse numerical order.
3. Select the entity that you want the report to now be based on, and then click **OK**.

Generating Reports for Multiple Entities

For reports based on more than one entity, you can add entities without having to create a new report.For DNIS reports, you can select up to 1,500 DNIS entities per report. However, note that reports with more than 20 DNIS entities will take additional time to generate.To add an entity to a report:

1. In an open report, click **Contents** > **Add**. You can also click the **Add** icon on the Toolbar. The Add Entity dialog box appears listing the entities not in the report.
2. To change the sort order of the entities in the list to more easily find the entity you want, click the entity title. Entities listed alphabetically are displayed in reverse alphabetical order; entities listed by number are displayed in reverse numerical order.
3. Select the entity to add to the report, and then click **OK**.

Removing Entities from Reports

For reports based on more than one entity, you can remove entities without having to create a new report.To remove an entity from a report:

1. In an open report, click **Contents** > **Remove**. You can also click the **Remove** icon on the Toolbar. The Remove Entity dialog box appears, listing the entities in the report.
2. To change the sort order of the entities in the list to more easily find the entity you want, click the entity title. Entities listed alphabetically are displayed in reverse alphabetical order; entities listed by number are displayed in reverse numerical order.
3. Select the entity to removed from the report, and then click **OK**.

Reordering the Items in a Report

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

1. In an open report, click **Contents** > **Reorder**. You can also click the **Reorder** icon on the Toolbar. The Reorder dialog box appears.
2. Select the desired sort criteria, and then click **OK**. The report entries are reordered according to your selection.

Reordering Fields in a Report

You can change the order of the fields in a tabular report by clicking the header of the field you want move, and then dragging the field to its new location in the report.You can add and remove fields in a tabular report.

Adding or Removing Fields in a Report

To add or remove fields in a report:

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

DNIS Information for Voice Call Activity

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

- **Name**. A unique name for the DNIS.
- **Number**. The IRN number represented by the DNIS as an entry point for voice or chat contacts.
- **Target ASA**. Target Average Speed of Answer. The amount of time (in seconds, in case of a Voice or Chat DNIS, or in hh:mm in case of an email DNIS) during which the call should be answered from the time it is received. This parameter is used to calculate the DNIS Target Service Factor (TSF).
- **Short Calls Threshold**. The amount of time (in seconds, in case of a Voice or Chat DNIS, or in hh:mm in case of an email DNIS) in which a call must end to be counted as a too short call in the Contact Center Reports.
- **Max ACD Talk Time**. The amount of time (in seconds, in case of a Voice or Chat DNIS, or in hh:mm in case of an email DNIS) that a call must exceed to be counted as a too long call in the Contact Center Reports.
- **Interval Time**. Determines the time period that will be monitored in the real-time reports for the DNIS. If this field is set to ten minutes, for example, the real-time report for that DNIS will show statistical information relevant to the last ten minutes.
- **Service Time Intervals**. This parameter determines the time intervals in which calls are monitored. The calls can be viewed in STI histogram reports that show the number of calls answered, abandoned, and waiting in each given interval.

DNIS Information for Email Activity

If you want to generate reports on email activity in an IVR Application, you first need to specify the associated DNIS.The DNIS options are:

- **Name**. A unique name for the DNIS.

- **Email Account**. The email account represented by the DNIS.
- **Target ASA**. The amount of time in which the email should be answered from the time it is received, and is used to calculate the DNIS Target Service Factor (TSF).
- **Short Calls Threshold**. The amount of time in which interaction with an email must end to be counted as "too short" in historical reports.
- **Max ACD Talk Time**. The amount of time that interaction with an email must exceed to be counted as "too long" in historical reports.
- **Interval Time**. The time period that will be monitored for realtime reports for the email DNIS
- **Service Time Intervals**. The time intervals in which emails are monitored. Statistics on the emails can be viewed in STI histogram reports that show the number of emails waiting in each given interval.