



A MITEL  
PRODUCT  
GUIDE

# Unify OpenScape Contact Center Agile V11 R1

Manager Administration

Manager Administration Guide

Administration Guide

04/2025

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# 1 About this guide

This guide provides an overview of the OpenScape Contact Center Manager application and walks users through the various administration tasks that need to be performed on an ongoing basis.

## 1.1 Who should use this guide

This guide is intended for contact center administrators, who are responsible for configuration maintenance, and for supervisors and managers, who use the OpenScape Contact Center productivity tools.

## 1.2 Formatting conventions

The following formatting conventions are used in this guide:

**Bold**

This font identifies OpenScape Contact Center components, window and dialog box titles, and item names.

*Italic*

This font identifies references to related documentation.

**Monospace Font**

This font distinguishes text that you should type, or that the computer displays in a message.

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**NOTE:** Notes emphasize information that is useful but not essential, such as tips or alternative methods for performing a task.

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**IMPORTANT:** Important notes draw special attention to actions that could adversely affect the operation of the application or result in a loss of data.

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## About this guide

[Documentation feedback](#)

### 1.3 Documentation feedback

To report an issue with this document, call the Customer Support Center.

When you call, be sure to include the following information. This will help identify which document you are having issues with.

- **Title:** Manager Administration Guide
- **Order Number:** A31003-S22B1-M105-06-76A9

## 2 Planning an implementation

Most customers work closely with their service representative through the planning and design phase of an OpenScape Contact Center implementation. The service representative takes responsibility for creating and implementing the initial configuration. The design database that is created for you is set up with definitions of the essential resources, an initial set of users, workflows that dictate how incoming contacts and queued contacts are handled, and mappings to the communication platform resources that OpenScape Contact Center monitors.

This chapter provides an overview of the key concepts that must be considered when planning an OpenScape Contact Center implementation, including a summary of the basic configuration tasks that must be performed to create a design database, put the design database into production, and perform the initial configuration of the system.

After the initial configuration has been put into production, on-going tasks include routine maintenance, such as maintaining users, profiles and extensions, and day-to-day supervisory tasks such as configuring and using the productivity tools.

Policy changes, new business, changes in performance requirements, and simple growth can result in the need to modify the contact routing aspects of your configuration. This commonly amounts to relatively isolated reconfiguration tasks, such as changing a Call Director menu setup, adding service for a new dialed number, or revisiting your queue setup. The latter part of this guide provides instructions on how to perform these types of reconfiguration tasks.

---

**NOTE:** Contact your service representative for assistance with major reconfiguration.

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## 2.1 OpenScape Contact Center processing

This section introduces the highest level elements of the OpenScape Contact Center configuration.

### 2.1.1 Initial processing

Incoming contacts are directed to OpenScape Contact Center as follows:

- **Voice** – For each dialed number serviced by the contact center, incoming contacts are held on the communication platform. The platform notifies OpenScape Contact Center of the contact, provides relevant contact information, and then waits for OpenScape Contact Center to provide directives on how to further process the contact. For more information on voice support, see [Chapter 11, "Working with voice resources"](#).
- **Callback** – In addition to basic voice support, OpenScape Contact Center supports callbacks. Callback is a feature that lets customers and users schedule outgoing calls to customers. OpenScape Contact Center then establishes and administers the call. For more information on callback support, see [Chapter 13, "Working with the callback feature"](#).
- **E-mail** – E-mail messages are routed through a corporate e-mail server to the OpenScape Contact Center E-mail Server. All e-mail messages are stored in a single mailbox on the corporate e-mail server. Support for multiple e-mail addresses can be handled by providing aliases. For more information on e-mail support, see [Chapter 14, "Working with the e-mail feature"](#).

### 2.1.2 Workflow processing

On arrival in OpenScape Contact Center, incoming contacts are processed by a routing strategy workflow. The workflow gathers contact requirements and determines how each contact is to be routed. For more information, see [Section 9.2, "About routing strategy workflows", on page 146](#).

### 2.1.3 Queue processing

While a contact is in queue, OpenScape Contact Center executes a number of steps to try to match the contact to a specific user. For details, see [Section 8.1, "About group-based routing", on page 139](#).

Although queued contacts are typically handled in the order that they are placed in the queue, OpenScape Contact Center has routing decision and queue properties, such as priority, that can determine the handling order.

While a contact is waiting in queue, a queue processing workflow is applied to the queue simultaneously. The queue or the queue processing workflow can handle the contact. For more information, see [Section 10.1, "About queues", on page 193](#) and [Section 9.5, "About queue processing workflows", on page 174](#).

## 2.2 Design database configuration overview

This section provides a high-level overview of the steps required to configure a design database.

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**NOTE:** Before you begin to configure the design database, you should complete the resource worksheets for the communication platform to which you are connecting. This ensures that you have all the required information for the configuration.

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For detailed instructions on how to complete each task, refer to the procedures provided in later chapters or in the *Manager Help*.

### 2.2.1 Basic design database configuration

Start by creating a new, empty design database, and then activate the required product features by using the license file.

**To configure a basic design database:**

1. Log on to the Manager application.
2. Create a new design database.
3. Activate the product features using a license file.

## Planning an implementation

Design database configuration overview

### 2.2.2 Communication platform connectivity and voice resources

To route telephone calls and gather statistics, the system monitors a set of key resources on the communication platform. Using the Manager application, you must configure a matching definition within OpenScape Contact Center for each resource on the communication platform.

For a list of communication platform resources, see [Section 11.3, "Communication platform resources", on page 216](#).

**To configure communication platform connectivity and voice resources:**

1. Configure the communication platform settings.
2. Configure the default time-out extension.
3. Configure the user IDs, extensions, UCD groups, requeue targets, and monitored destinations for the OpenScape Business communication platform.

### 2.2.3 Configuring the corporate server connections

Depending on the features that are licensed, you must configure the connections to the corporate e-mail server for the OpenScape Contact Center e-mail feature, and to the corporate Web server for the OpenScape Contact Center Web-enabled features.

**To configure the corporate e-mail server connections:**

1. Configure the IMAP server settings that the OpenScape Contact Center E-mail Server uses to communicate with the corporate e-mail server to route incoming e-mail messages.
2. Configure the SMTP server settings that the OpenScape Contact Center E-mail Server uses to communicate with the corporate e-mail server to route outgoing e-mail messages

**To configure the corporate Web server connections:**

1. Configure the port number of the unsecured port and TLS-enabled port that the Web Interaction Server uses to communicate with the corporate Web server.
2. Configure the port number that the Web Interaction Server uses to communicate with the corporate Web server for Web callback requests.

## 2.2.4 Configuring users and user-based resources

When you create a new user, you must specify at a minimum, the following attributes: the user's first name, last name, ID, user name, and either the password for OpenScape Contact Center authentication or the domain name for Windows authentication.

### To configure users and user-based resources:

1. Configure groups.
2. Configure departments.
3. Configure locations.
4. Configure users. You can configure each user manually, or you can create multiple users.
  - To create multiple users based on a user template, configure the user templates.
  - To create multiple users by importing a user list, create the user list.
  - If you created multiple users, complete the user definitions. For example, after creating multiple users based on a user template, you may need to assign users to departments and team lists.

## 2.2.5 Configuring wallboard and Broadcaster resources

To use the wallboard and Broadcaster, you must configure them to display messages.

### To configure wallboard and Broadcaster resources:

1. Create wallboard definitions (optional).
2. Configure wallboard views.
3. Configure wallboard distributions.
4. Configure Broadcaster views.
5. Configure Broadcaster distributions.

### 2.2.6 Configuring the routing resources

For each media type that is licensed (for example, voice, e-mail), you must configure the routing resources.

#### To configure routing resources for each media type:

1. Configure queues.
2. Configure components for each workflow type.
3. Make a copy of the sample routing strategy workflow provided and modify it, as required.
4. Make a copy of the sample queue processing workflow provided and modify it, as required. You can skip this step if you want the communication platform to handle all queue processing.

### 2.2.7 Completing the setup

For each media type that is licensed (for example, voice, e-mail), you can configure further settings for handling contacts.

Complete the setup for each media type:

1. Configure the default routing strategy, queue, and error queue settings.
2. Configure the Unavailable reasons, Work reasons, and Wrap-up reasons.
3. For e-mail, configure the destinations, categories, templates, Discard reasons, and the remaining e-mail options, such as the default routing schedule. You can also display confidence levels, if required.
4. For callbacks, configure the Delete reasons, Retry reasons, Excluded numbers, and the remaining callback options, such as the default routing schedule.

### 2.2.8 Configuring report definitions

A report definition defines the properties of a report. Some properties are common to all report types, while others options are specific to certain report types. A particular report definition depends on the report type, the resources that need to be reported on, the required format of the report, the report schedule, and so on. Many options are available.

## 2.2.9 Configuring Call Director

If Call Director is licensed, you must configure a voice processor to be used with the system. A voice processor is used with Call Director to play messages and interact with the caller.

---

**IMPORTANT:** When using the Communication Platform OpenScape Business, you cannot deactivate the feature "Call Director" in the **Features** tab of the **Options** window. This is due to the fact that the "Disconnect" node requires Call Director functionality for this switch type.

---

**To configure Call Director:**

1. Configure the voice processor.
2. Configure the Call Director extensions.

## 2.2.10 Validating the design database

You can check for and resolve any inconsistencies in the design database. For example, the system can find any servers or communication platform resources that are not configured, or users who are not included in a group.

## 2.3 Performing the initial Manager configuration

After the communication platform is configured and you have installed the OpenScape Contact Center server and client software and integrated the third-party components, you must configure the Manager application for first-time use.

This section provides an overview of the steps required to perform the initial Manager configuration. For detailed instructions, see the *Manager Help*.

**To perform the initial Manager configuration:**

1. Log on to the Manager application and connect to the already configured design database.
2. Activate the product features in the production database using the same license file that you used to activate features in the design database, and then upload the design database.

## Planning an implementation

Performing the initial Manager configuration

3. After restarting the **OpenScape Contact Center** and **OpenScape Contact Center AutoPA** services, log on to the Manager application and connect to the production database.
4. If you have not already done so, change the default password for the Master Administrator user account to align with the organization's corporate security policy.
5. Ensure that the Config Sync feature is enabled.
6. In the **Telephony Center**, under **Communication Platform Resources**, ensure that the state is **Active** for the following resources.
  - User extensions
  - UCD groups
7. In the **Administration Center**, under **Users**, ensure that the state is **Active** for all users (except supervisors or administrators who are not handling contacts).
8. Ensure that the required .wav files are installed on the main server machine, and then assign the .wav files to the appropriate routing strategy and queue processing workflows.
9. Configure wallboards, as required.

## 3 Getting started

This chapter introduces you to the Manager application and describes how to log on to the application.

### 3.1 About the Manager application

The Manager application provides contact center managers and supervisors with a unified, easy-to-use interface for performing all contact center management tasks.

Manager features include:

- An intuitive user interface for system configuration and user administration tasks.
- A powerful design tool for creating routing strategy and queue processing workflows.
- Real-time statistics and performance data that can be distributed to user desktops or wallboards.
- Customizable real-time, cumulative, and historical reports in graphical and tabular format.
- Built-in analytic model for predicting trends in operating conditions.
- Configurable alerts, thresholds, and notifications.
- Automatic detection and identification of synchronization errors or mismatched resources.

### 3.2 Logging on to the Manager application

Each Manager user has a unique user name, as well as a password that might be required to log on to the Manager application. Your user definition determines what permissions you have. If you do not have the Manager access permission, you cannot log on to the Manager application.

## Getting started

### Logging on to the Manager application

Your user definition also determines whether you use OpenScape Contact Center authentication or Windows authentication when you log on. If you use Windows authentication, you will not be able to log on to a design database, and you will not see the Logon dialog box when you start the Manager application. The Manager application will simply verify your Windows user name and then open.

---

**NOTE:** If you are logging on to the Manager application for the first time, you are logging on using the Master Administrator user account. For details, see [Section 3.2.1, "About the Master Administrator", on page 21](#).

---

#### To log on to the Manager application:

1. On the **Start** menu, point to **Programs**, then **OpenScape Contact Center Agile**, and then click **Manager**. The application displays the Logon dialog box.
2. To log on to the default database, proceed directly to step 4. To log on to a database other than the default database, click **Options**, and then do one of the following:
  - To connect to the production database:
    - In the **Connect to** list, select **Production Database**.
    - In the **Administration Server** box, type the address of the Administration Server on the main server machine in the format *portnumber@servername*. The default is *6000@servername*.
  - To connect to a design database:
    - In the **Connect to** list, select **Design Database**.
    - In the **Design database file name** box, type the full path and file name for the database. You can click  to locate and select the database file. If you specify a database name that does not exist, the application will create a new blank design database. If you attempt to connect to a design database that uses an unsupported communication platform type, the application will prompt you to upgrade the database and select a supported type.
3. In the **User name** box, type your user name.
4. In the **Password** box, type your password.

5. Click **OK**.

---

**NOTE:** Occasionally, false alarm notifications may appear in the "Notification" window after login due to cached transitional states. These can be safely ignored, as the OSCC server status will be updated correctly in sequence. Only the most recent state should be taken into consideration.

---

### **3.2.1 About the Master Administrator**

The Master Administrator is a default user account configured in each newly created OpenScape Contact Center database. The Master Administrator user account has access to all the functions in the Manager application. The default user name for the Master Administrator is **master**, and the default password is **password**. You should change the default Master Administrator password the first time you log on, and then change it periodically to conform to security policies at your site. For details, see [Section 15.2.2, "Changing the password", on page 265](#).

If the Master Administrator remains logged on but inactive for a configured period of time, the Master Administrator is logged off automatically. For details on how to configure the time-out interval for the Master Administrator account, see [Section 15.4, "Configuring the application options", on page 274](#).

## Getting started

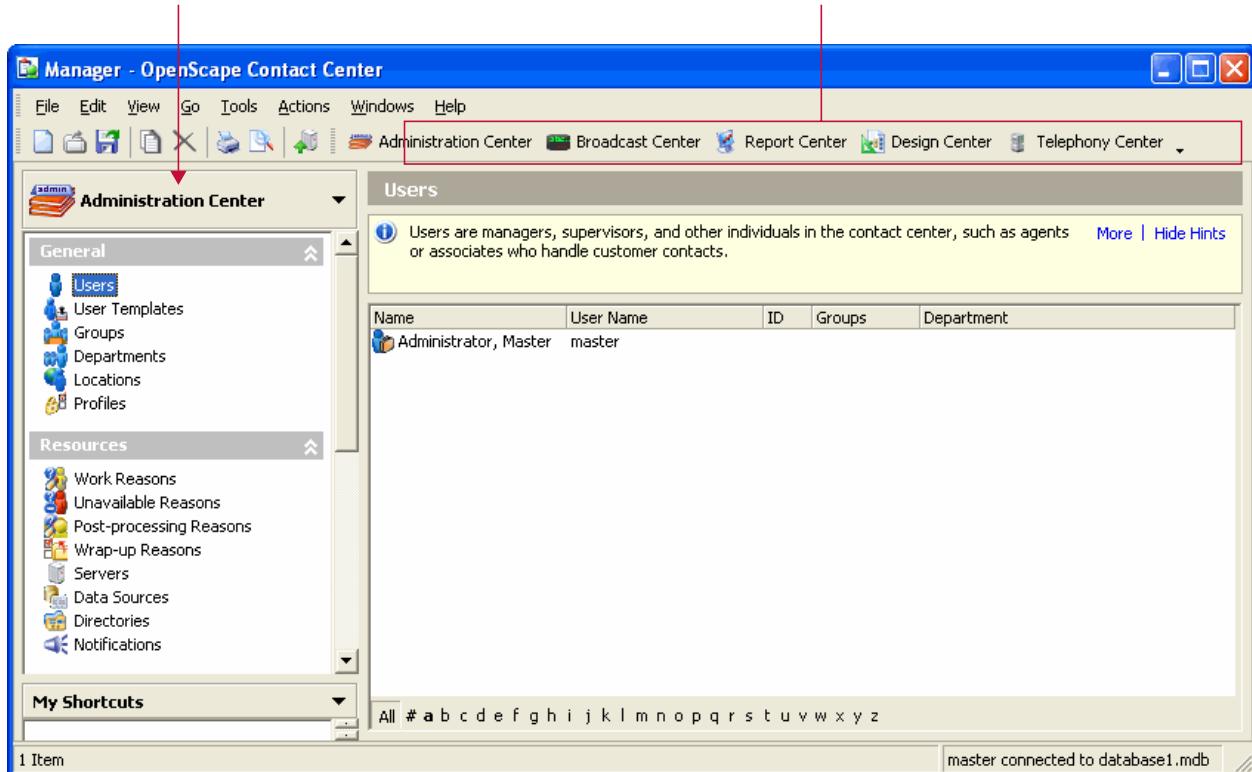
About the user interface

### 3.3 About the user interface

The Manager application has five main work centers dedicated to helping you perform key contact center management tasks: Administration Center, Broadcast Center, Design Center, Report Center, and Telephony Center.

Selected Manager work

Access to other work



#### 3.3.1 Administration Center

The Administration Center provides a central point of administration for all user-related configuration. The Administration Center is the area where you define and manage resources, such as users, user templates, profiles, data sources, directories, and notifications.

### **3.3.2 Broadcast Center**

The Broadcast Center provides a fully integrated and powerful communication tool for keeping your contact center personnel informed at all times. You can send real-time statistics and performance data for all media types to wallboards or directly to user desktops via the Broadcaster.

The Broadcast Center is the area where you define and manage wallboard and Broadcaster views and definitions.

### **3.3.3 Design Center**

The Design Center provides a powerful workflow-style tool for defining intelligent routing strategy and queue processing workflows to handle all multimedia contact center interactions.

To streamline the creation of workflows, OpenScape Contact Center provides a library of configurable and reusable routing strategy and queue processing components. A drag-and-drop interface allows you to configure workflows that are automatically validated for completeness as they are created.

The Design Center is the area where you define and manage the queues and workflows that determine how incoming contacts are routed.

### **3.3.4 Report Center**

The Report Center provides a powerful, yet easily customized reporting engine for defining and viewing real-time, cumulative, and historical reports for all media types. Versatile reporting allows for better operational monitoring, more effective decision making, and the ability to proactively recognize and respond to patterns before they become issues.

The Report Center is the area where you define and manage the reports that provide insight into your contact center operations.

### **3.3.5 Telephony Center**

The Telephony Center simplifies the synchronization between OpenScape Contact Center and the communication platform. The Telephony Center is the area where you configure the OpenScape

## Getting started

### About the user interface

Contact Center communication platform resources and other external components that OpenScape Contact Center monitors to route contacts and collect statistics for reporting.

# 4 Working with users, templates and profiles

This chapter describes how to configure user definitions, as well as how to work with user templates and profiles.

## 4.1 Configuring a user

To use the Manager application, a user definition must be configured in the Manager application. Factors such as hiring, attrition, and contact center expansion require that user definitions be created, deleted, and modified on a regular basis. Administrators are normally responsible for configuring all users in the contact center. Administrators cannot modify their own user definitions.

---

**NOTE:** To create or change a user, you must have Full or Modify access, respectively, for the **Users** Manager permission. If the enhanced security option is enabled, you must also have the required security access to change the user. For details on the enhanced security option, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).

---

For users who have voice capabilities/access, you must ensure that there is a matching user definition on the communication platform. You can use the Config Sync feature to assist with the management of users. For details, see [Section 11.4.1, "Config Sync treatment of user IDs", on page 218](#).

### Overview

The following is an overview of the steps required to configure all the attributes in a user definition:

1. Configure the general user properties – see [Section 4.1.1, "Configuring the general user properties", on page 27](#).
2. Configure the user permissions – see [Section 4.1.2, "Configuring the user permissions", on page 30](#).
3. Configure the contact handling settings for the user – see [Section 4.1.3, "Configuring the contact handling settings for a user", on page 32](#).
4. Configure the media-specific settings for the user – see [Section 4.1.4, "Configuring the media-specific settings for a user", on page 34](#).

## Working with users, templates and profiles

### Configuring a user

5. Configure the thresholds for the user – see [Section 4.1.6, "Configuring the thresholds for a user", on page 36](#).
6. Configure the resources that the user can monitor – see [Section 4.1.7, "Configuring the resources a user can monitor", on page 39](#).
7. Configure the Team List for the user – see [Section 4.1.8, "Configuring the reports for a user", on page 40](#).
8. Configure the reports that display data about the user – see [Section 4.1.8, "Configuring the reports for a user", on page 40](#).
9. Configure the users who can modify this user, and the resources that the user can modify – see [Section 4.1.9, "Configuring the security settings for a user", on page 41](#).

---

**NOTE:** You can also create new users based on a user template (see [Section 4.2, "About user templates"](#)).

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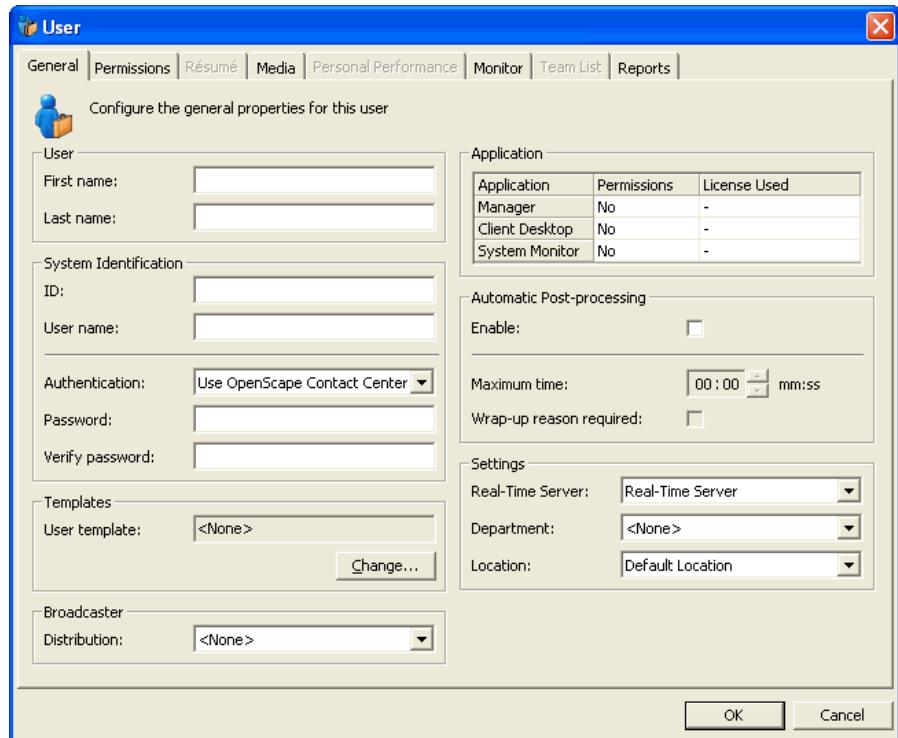
### 4.1.1 Configuring the general user properties

You can configure the general user properties, such as the user's name, system identification settings, department, and so on.

When creating a new user, as a minimum, you must specify the user's first name, last name, ID, user name, and either the password for OpenScape Contact Center authentication or the domain name for Windows authentication.

**To configure the general user properties:**

1. On the **File** menu, point to **New**, then **Administration Center**, then **User**, and then click **User**.



2. On the **General** tab, under **User**, do the following:
  - In the **First name** box, type the user's first name.
  - In the **Last name** box, type the user's last name.
3. Under **System Identification**, do the following:
  - In the **ID** box, type a unique, numerical ID used to identify the user on the communication platform. If you are using the Config Sync feature and the ID you provide is not within a monitored domain range, you will be prompted to create a new Config Sync domain range. For more information, see [Section 11.4, "About Config Sync", on page 217](#).
  - In the **User name** box, type a unique user name. This name is used when logging on to the Manager application and for recording statistics. If you want to use the Windows authentication method, the user name must match the name used for logging on to the Windows domain.

## Working with users, templates and profiles

### Configuring a user

- In the **Authentication** list, select one of the following:
  - To have the system validate the user, select **Use OpenScape Contact Center**, type the password in the **Password** box, and then type it again in the **Verify password** box to ensure that you typed it correctly.
  - To have Windows validate the user, select **Use Windows**, and then type the NetBIOS name for the Windows domain in the **Domain** box. Ensure that the user name matches the name used for logging on to the Windows domain. When you select this option, this user will not be able to log on to a design database, and will not see the Logon window when starting the Manager application.
- 4. To set the user attributes based on a user template (see [Section 4.2, "About user templates", on page 43](#)), under **Templates**, click **Change** and select the user template you want to apply to the user from the list. If you later change an attribute in the user record or user template, an indicator shows that the template association is not current. For details, see [Section 4.2.1, "User template associations", on page 44](#).
- 5. Under **Broadcaster**, in the **Distribution** list, select the name of the Broadcaster distribution that you want the user to be assigned to.
- 6. Under **Application**, specify the user's access to the three OpenScape Contact Center applications. For each application, click the item in the **Permissions** column and select the access from the list. For the Manager and System Monitor applications, the access is simply **Yes** or **No**. The **License Used** column shows the type of license used based on your selection. You can check the product features to see how many licenses are available for the contact center. Under **Automatic Post-processing**, do the following:
  - To have the system automatically place the user in Post-processing handling state after the user disconnects from a contact, select the **Enable** check box. If you configure this option, do not configure the Autowork feature for this user on the communication platform.
  - If you specify a time in the **Maximum time** box, the user will remain in Post-processing handling state for the duration of time specified.
  - To have the user remain in Post-processing handling state until a Wrap-up reason has been saved for the contact, select the **Wrap-up reason required** check box. If a Maximum time has also been specified, the user will remain in Post-processing handling state for the time specified after the user saves a Wrap-up reason.

7. Under **Settings**, do the following:

- In the **Real-Time Server** list, select the Real-Time Server to which the user can connect. Your contact center should have only one Real-Time Server, so there will be only one item in the list.
- To include statistics for this user in department-based reports, in the **Department** list, select a department for the user.
- To enable user reports to be based on the time zone of the user's location, in the **Location** list, select the location of the user.

8. If you are finished working with this user definition, click **OK**.

#### 4.1.2 Configuring the user permissions

Permissions control the user's access to the Manager application features and the resources that the user can work with. Although you can assign each permission individually, you normally specify one or more user profiles to save time. For details, see [Section 4.3, "About user profiles", on page 52](#). You can use the default permissions as defined in the selected profile or you can modify the permissions, as required.

---

**IMPORTANT:** Use care when assigning permissions. The ability for a user to create other users and change their permissions should be strictly controlled.

---

**NOTE:** For some permissions, you must configure other settings in the Manager application. For example, if you want a user to have access to an external directory in the Mobile Supervisor application, you enable the **Directory** Supervisor permission, and then configure the contact lookup settings in the Options dialog box.

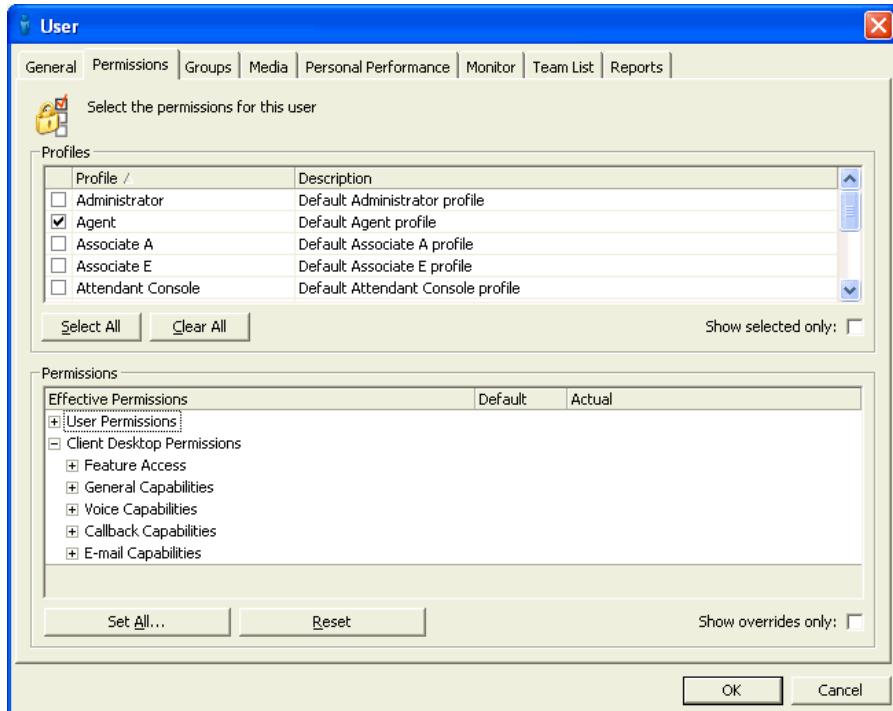
---

## Working with users, templates and profiles

### Configuring a user

#### To configure the user permissions:

1. In the **Administration Center**, under **General**, click **Users**, and then, in the right pane, double-click the user you want to configure.
2. Click the **Permissions** tab.



3. In the **Profiles** table, select the check box for each profile that you want to assign to the user. If two or more profiles are selected, the user's actual access level is changed to the highest access level of the selected profiles.
4. Optionally, in the **Permissions** table, modify the default permissions. For each function you want to change, click the item in the **Actual** column and select the access level from the list. For a description of the access levels, see [Section 4.3.3, "Access levels", on page 56](#).

**NOTE:** You can click **Reset** to reset the effective permissions to the default access levels.

5. To show only the permissions in the list for which the default access level has been modified, select the **Show overrides only** check box.
6. If you are finished working with this user definition, click **OK**.

### 4.1.3 Configuring the contact handling settings for a user

When the system is configured for group-based routing, you must select the groups that a user belongs to. The groups that you select determine the types of contacts that the user is eligible to receive. For more information, see [Section 8.1, "About group-based routing", on page 139](#).

---

**NOTE:** The Contact Handling tab in the User dialog box becomes active only when you select the **Receive contacts routed by OpenScape Contact Center** User permission.

---

**To configure the contact handling settings for a user:**

1. In the **Administration Center**, under **General**, click **Users**, and then, in the right pane, double-click the user that you want to configure.
2. Click the **Contact Handling** tab.
3. Under **Include**, select the check box for each group to which you want to assign this user. You can select up to 10 groups.
4. If you are finished working with this user definition, click **OK**.

### 4.1.4 Configuring the media-specific settings for a user

For each user, you can configure the following settings that are specific to the media type:

- **Voice** – The backup group to be used if the OpenScape Contact Center system goes down.
- **E-mail** – The queue to which the user's e-mail messages are sent if you want to monitor the user silently.

**To configure the media-specific settings for a user:**

1. In the **Administration Center**, under **General**, click **Users**, and then, in the right pane, double-click the user you want to configure.
2. Click the **Media** tab.
3. Under **Voice Settings**, in the **Backup UCD group** list, select the UCD group to be used if the OpenScape Contact Center system goes down and the communication platform is used to route calls.

## Working with users, templates and profiles

### Configuring a user

4. or If this user has e-mail permission, under **E-mail Settings**, in the **Silent monitoring queue** list, select the e-mail queue to which the user's e-mail messages are requeued after the user sends them. This feature allows the e-mail messages to be reviewed by a manager or supervisor before they are sent to a customer. This feature is optional.
5. If you are finished working with this user definition, click **OK**.

### 4.1.5 Configuring the thresholds for a user

The system can display statistics in the users application based on whether a user has exceeded certain personal performance thresholds. These statistics can help to show how well the user is handling contacts. You can set thresholds for values such as the maximum post-processing time, maximum handling time (for each media type), and utilization.

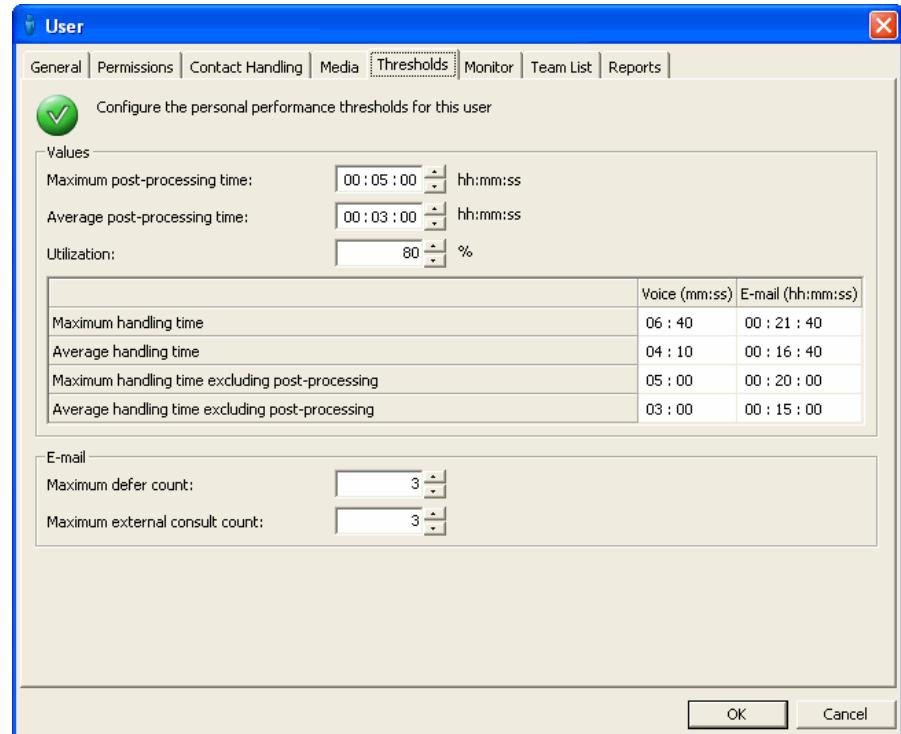
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**NOTE:** The Thresholds tab in the User dialog box becomes active only when you select the **Receive contacts routed by OpenScape Contact Center** and **Personal performance** permissions. You must enable the **Receive contacts routed by OpenScape Contact Center** permission before you can select the **Personal performance** permission.

---

**To configure the thresholds for a user:**

1. In the **Administration Center**, under **General**, click **Users**, and then, in the right pane, double-click the user you want to configure.
2. Click the **Thresholds** tab.



3. Under **Values**, do the following:

- In the **Maximum post-processing time** box, type the maximum amount of time that the user should spend in Post-processing handling state while completing a contact.
- In the **Average post-processing time** box, type the average amount of time that the user should spend in Post-processing handling state while completing a contact.
- In the **Utilization** box, type the percentage of time the user should spend handling a contact. The Utilization calculation is based on the total time that the user is logged on to the communication platform. You can change the Utilization calculation to include Available time in addition to Work time. For details, see [Section 15.7.3, "Configuring the user calculation", on page 293](#).

## Working with users, templates and profiles

### Configuring a user

4. In the grid, specify the following thresholds for each media type:
  - In the **Maximum handling time** box, type or select the maximum amount of time that the user should spend handling a routed contact.
  - In the **Average handling time** box, type or select the average amount of time that the user should spend handling a routed contact.
  - In the **Maximum handling time excluding post-processing** box, type or select the maximum amount of time that the user should spend handling a routed contact, not including the time spent post-processing the contact.
  - In the **Average handling time excluding post-processing** box, type or select the average amount of time that the user should spend handling a routed contact, not including the time spent post-processing the contact.
5. If this user has e-mail permission, under **E-mail**, do the following:
  - In the **Maximum defer count** box, type the maximum number of e-mail messages that the user should defer.
  - In the **Maximum external consult count** box, type the maximum number of e-mail messages that the user should forward to external users for consultation.
6. If you are finished working with this user definition, click **OK**.

### 4.1.6 Configuring the resources a user can monitor

You can configure a user to monitor other resources in the OpenScape Contact Center database, such as users, groups, queues and aggregates. Monitoring permission is usually given only to supervisors, managers, and administrators.

When a user has monitoring permission for a resource, the user can:

- View statistics for the resource.
- Create a Broadcaster or wallboard view item about the resource in the Broadcast Center.
- Report on the resource in the Report Center.

When the monitored resource is a user, a user can:

- Edit and run reports owned by the monitored user.
- Assign the monitored user as the owner of reports.
- Add the monitored user to a Team List.
- View and edit Broadcaster and wallboard views owned by the monitored user.

---

**NOTE:** You cannot change your own monitored resources.

---

**To configure the resources a user can monitor:**

1. In the **Administration Center**, under **General**, click **Users**, and then, in the right pane, double-click the user you want to configure.
2. Click the **Monitor** tab.
3. Under **Include**, in the **Show** list, select the type of resource to be monitored.
4. Select the resources you want the user to monitor in one of the following ways:
  - To have the user monitor all resources in the list, select the **Monitor All** check box.

---

**NOTE:** You can select the Monitor All check box only if your own user definition has the Monitor All capability.

---

- To have the user monitor only some of the resources in the list, select the check box for each item you want the user to monitor.
5. Repeat steps 3 and 4 for each type of resource to be monitored.
6. If you are finished working with this user definition, click **OK**.

#### **4.1.7 Configuring the reports for a user**

You can configure the reports that display data about a user.

---

**NOTE:** The Reports tab in the User dialog box becomes active only when you select the **Receive contacts routed by OpenScape Contact Center** User permission.

---

## Working with users, templates and profiles

### Configuring a user

#### To configure the reports for a user:

1. In the **Administration Center**, under **General**, click **Users**, and then, in the right pane, double-click the user you want to configure.
2. Click the **Reports** tab.
3. Under **Reports**, in the **Select by** box, do one of the following:
  - Select **User**, and then select the check box for each report that you want to display data about this user. The list contains only the reports you own, or reports that are owned by users you can monitor.
  - Select **Department**, and then view the reports that display data about this user's department.
  - Select **Group**, and then view the reports that display data about this user's group.

---

**NOTE:** When **Department** or **Group** is selected in the **Select by** box, you can view only the reports that display data about this user's department or group. You cannot add individual users to or remove individual users from these reports. Also, the list of reports shown on the Reports tab is not dynamically updated if the user's department or group is changed while the User dialog box is open.

---

---

**NOTE:** When you are editing a user definition that is associated with a user template, the reports in the list that are associated with the user template are read-only. If you want to remove one of those reports from the user definition, you must either break the user's association with the user template, or remove the report from the user template and update all users (in which case, all users associated with the user template will be removed from the report).

---

4. If you are finished working with this user definition, click **OK**.

## 4.1.8 Configuring the security settings for a user

The enhanced security feature provides an additional level of security for the contact center. If the enhanced security option is enabled, you can:

- Configure the users who can modify this user.
- Configure the resources in the OpenScape Contact Center database that the user can modify.

Modify permission is usually given only to administrators.

For details on the enhanced security option, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).

### To configure the security settings for a user:

1. In the **Administration Center**, under **General**, click **Users**, and then, in the right pane, double-click the user you want to configure.
2. Click the **Security** tab.
3. To configure the users who can modify this user, do the following:
  - a) Under **Configure**, select **Users who can modify this user**. This option is disabled if the user you are configuring does not have access to the Manager application.
  - b) Under **Users**, select the check box for each user who you want to be able to modify this user. The list contains only the users who have Full or Modify access for the **Users** Manager permission.
4. To configure the resources that the user can modify, do the following:
  - a) Under **Configure**, select **Resources this user can modify**. This option is disabled if the user does not have Full or Modify access permission for any of the eligible resources.
  - b) Under **Include**, in the **Show** list, select the type of resource that you want to configure. The list contains only the resource types for which both you and the user have Full or Modify access permission.
  - c) In the resulting list, select the check box for each resource that you want this user to be able to modify.
5. If you are finished working with this user definition, click **OK**.

## 4.2 About user templates

User templates are very useful for the initial configuration of a large number of users. Instead of setting the attributes individually for each new user, you can assign most of the attributes to many users at one time.

When you configure a user template (see [Section 4.2.2, “Configuring a user template”, on page 44](#)), you specify all the user attributes except the following attributes which must be set individually for each new user:

- First name
- Last name
- ID
- User name
- Password (only if using OpenScape Contact Center authentication)

You can then use a template to create a single user or multiple users. For details, see the following topics:

- [Section 4.2.3, “Creating a user based on a user template”, on page 47](#)
- [Section 4.2.4, “Creating multiple users based on a user template”, on page 49](#)

You specify the default user template in the Options dialog box. For details, see [Section 15.1, “Configuring the personal options”, on page 261](#).

---

**NOTE:** If you intend to maintain the configuration of users within your contact center through the use of user templates, we recommend that you use only the templates to change the user properties, rather than changing the properties within other resources that have an association with the user. For example, if you want to change the users that are assigned to a particular department, you should change the department within the user template, rather than changing the users selected on the Users tab within the department, or changing the department selected within each user record. This will ensure that the association with the user template is maintained. For more information, see [Section 4.2.1, “User template associations”, on page 44](#).

---

## 4.2.1 User template associations

Each user template contains a list of users that are associated with that user template. The association between a user and a user template remains until an attribute (other than a user-specific attribute) is changed in the user record or user template record, at which time the association is broken. The association between a user and a user template is also broken if the user or user template is deleted.

If you break a user template association, the user record shows the last template applied to the user, with a clear indication that the association is historical rather than active.

When you update a user template, you can choose to update the user template only or to update all users associated with the user template. For details, see [Section 4.2.2.3, "Updating a user template", on page 46](#).

If a user report is part of a user template and you use the User Report dialog box to perform any of the following tasks, it will not change the user's template association:

- Add the user to a new report.
- Add the user to an existing report.
- Remove the user from an existing report.

In each of these scenarios, the user's template association will be maintained and neither the template nor any other users associated with the template will be affected.

---

**NOTE:** If a user report is part of a user template and you change the Report by and Select by options in the report to anything other than User, the report is removed from the user template and the user definitions that are associated with that template, but the user template associations are maintained.

---

## 4.2.2 Configuring a user template

You can configure user templates in several ways. For details, see the following topics:

- [Section 4.2.2.1, "Creating a user template"](#)
- [Section 4.2.2.2, "Creating a user template based on an existing user"](#)

## Working with users, templates and profiles

### About user templates

- [Section 4.2.2.3, "Updating a user template"](#)

---

**NOTE:** To create or change a user template, you must have Full or Modify access, respectively, for the **User templates** Manager permission. If the enhanced security option is enabled, you must also have the required security access to change the user template. For details on the enhanced security option, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).

---

#### 4.2.2.1 Creating a user template

You can create a new user template as described in this topic.

**To create a user template:**

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **User Template**.
2. On the **General** tab, under **User Template**, do the following:
  - In the **Name** box, type a unique name for the user template.
  - In the **Description** box, type a description for the user template.
3. Under **Template**, click **Edit**.
4. Modify the settings (other than the user-specific attributes) in the same way that you configure the settings for a user. When you are finished, click **OK** to return to the user template dialog box.
5. Click the **Users** tab.
6. Under **Users**, select the check box for each user who you want to associate with this template. To select multiple users, hold down **CTRL** or **SHIFT** and click to select the users, and then press the **SPACE** bar. When you press the **SPACE** bar, all cleared check boxes will be selected and all selected check boxes will be cleared.
7. Click the **Security** tab. This tab is available only if the enhanced security option is enabled. For details, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).
8. Under **Users**, select the check box for each user who you want to be able to modify this user template. The list contains only the users who have Full or Modify access to the **User templates** Manager permission.
9. Click **OK**.

#### 4.2.2.2 Creating a user template based on an existing user

You can create a user template based on an existing user definition.

**To create a user template based on an existing user:**

1. In the **Administration Center**, under **General**, click **Users**.
2. In the right pane, select the user on which you want to base the new user template.
3. On the **Actions** menu, select **Create Template from User**.
4. On the **General** tab, under **User Template**, do the following:
  - In the **Name** box, type a unique name for the user template.
  - In the **Description** box, type a description for the user template.
5. Under **Template**, click **Edit**.
6. Modify the settings (other than the user-specific attributes) in the same way that you configure the settings for a user. For details, see [Section 4.1, "Configuring a user", on page 25](#).

#### 4.2.2.3 Updating a user template

When you update a user template, you can choose to update the user template only or to update all users associated with the user template.

**To update a user template:**

1. In the **Administration Center**, under **General**, click **User Templates**.
2. In the right pane, double-click the user template that you want to change.
3. Under **Template**, click **Edit**.
4. Modify the settings (other than the user-specific attributes) in the same way that you configure the settings for a user. See [Section 4.1, "Configuring a user", on page 25](#).
5. Click the **Users** tab.
6. Under **Users**, select the check box for each user who you want to associate with this template. To select multiple users, hold down CTRL or SHIFT and click to select the users, and then press the SPACE bar. When you press the SPACE bar, all cleared check boxes will be selected and all selected check boxes will be cleared.

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### About user templates

7. Click **OK**.
8. In the **User Template Updates** dialog box, do one of the following:
  - To update the user template with your changes, select **Update template only**. If you choose this option, the association between the template and any users created based on the template will be broken and will be indicated as historical rather than active in the User dialog box.
  - To update all currently associated users with your changes, select **Update all users**. In this case, the association between the template and all users created based on the template will be maintained.
9. Click **OK**.

### 4.2.3 Creating a user based on a user template

Instead of setting the attributes individually for each new user, you can create a new user based on the default user template. For more information, see [Section 4.2, "About user templates", on page 43](#). You specify the default user template in the Options dialog box (see [Section 15.1, "Configuring the personal options", on page 261](#)).

Only the following user-specific attributes must be set individually for each new user: the first name, last name, ID, user name, and password.

#### To create a user based on a user template:

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **User**, and then click **User from Default Template**. A User dialog box that contains the attributes of the selected user template is displayed.
2. On the **General** tab, under **User**, do the following:
  - In the **First name** box, type the user's first name.
  - In the **Last name** box, type the user's last name.

3. Under **System Identification**, do the following:

- In the **ID** box, type a unique, numerical ID used to identify the user on the communication platform.
- In the **User name** box, type a unique user name. This name is used when logging on to the Manager application and for recording statistics.
- In the **Authentication** list, do the following:
  - To have the system validate the user, click **Use OpenScape Contact Center**, type the password in the **Password** box, and then type it again in the **Verify password** box to ensure that you typed it correctly.
  - To have Windows validate the user, click **Use Windows**, and then type the NetBIOS name of the Windows domain in the **Domain** box. Ensure that the user name is the same in both Windows and OpenScape Contact Center. When you select this option, this user will not see the **Logon** window when starting the Manager application.

4. Click **OK**.

#### 4.2.4 Creating multiple users based on a user template

When you are connected to a design database, you can create multiple users based on a user template simultaneously. For more information, see [Section 4.2, "About user templates", on page 43](#).

---

**NOTE:** You cannot create multiple users when you are connected to a production database.

---

For each user you create, you must provide the user-specific attributes (that is, first name, last name, ID, user name, and password). The remaining attributes are set based on a specified user template.

You also have the option of creating multiple users by importing a text file that lists the user-specific attributes. For details, see [Section 4.2.5, "Creating multiple users by importing a text file", on page 50](#).

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#### To create multiple users:

1. On the **File** menu, point to **New**, then **Administration Center**, then **User**, and then click **Add Multiple Users**.
2. In the **Add Multiple Users** window, complete the following attributes for each user you want to create:
  - **First Name** – Type the user's first name.
  - **Last Name** – Type the user's last name.
  - **ID** – Type a unique, numerical ID used to identify the user on the communication platform.
  - **User Name** – Type a unique user name. This name is used when logging on to the Manager application and for recording statistics.
  - **Password** – Type the password required for OpenScape Contact Center authentication. If the user template specifies to use Windows authentication, this box can be left blank. If this box is left blank and the user template specifies to use OpenScape Contact Center authentication, the user will not be created.
  - **Confirm Password** – Type the password again to confirm that you typed it correctly.
  - **User Template** – Click the cell in the table and select the name of the user template from the list. If you leave this box blank, the default user template will be used; however, if a default user template has not been specified in the Options dialog box (see [Section 15.1, "Configuring the personal options", on page 261](#)), the user will not be created.
3. Click **Create Users**. The application creates the users based on the information you provided. The User list indicates the status of the user creation process:
  -  – Indicates that the user was created successfully.
  -  – Indicates that the user was not created.

## 4.2.5 Creating multiple users by importing a text file

When you are connected to a design database, you can create multiple users by importing a text file that lists the user-specific attributes. For specifications of the text file, see [Section 4.2.5.1, "User list requirements", on page 51](#).

---

**NOTE:** You cannot create multiple users when you are connected to a production database.

---

### To create multiple users by importing a text file:

1. On the **Tools** menu, click **Import Users**.
2. In the **Open File** dialog box, select the text file that contains the list of users you want to import, and then click **Open**.
3. In the **Add Multiple Users** window, verify that the attributes in the list were imported correctly.
4. Optionally, in the **User Template** column, click the cell and select the required user template from the list.
5. Click **Create Users**. The application creates the users based on the template specified in the text file or, if a template is not specified, based on the default user template. The User list indicates the status of the user creation process:
  -  – Indicates that the user was created successfully.
  -  – Indicates that the user was not created.

### 4.2.5.1 User list requirements

The user list is a text file that contains a list of users that you want to create. The text file must meet the following requirements:

- It must contain one user record per line.
- Each line must contain six fields separated by a | character (five | characters). For example, if you do not specify a user template, the line would contain:

First Name|Last Name|ID|User Name|Password|

where the last | character is required to indicate that the user template is not specified.

- The text is case-sensitive and will appear exactly as you type it.

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- Comment lines that begin with // will be ignored.

The following table summarizes the fields for each record.

Field name	Mandatory	Field description
First name	Y	User's first name. Maximum 30 characters.
Last name	Y	User's last name. Maximum 35 characters
ID	Y	Numerical ID used to identify the user on the communication platform. Maximum three digits.
User name	Y	Name used when logging on to the Manager application and for recording statistics. Maximum 35 characters.
Password	N	If the user template specifies Windows authentication, this field can be left blank. If the template specifies OpenScape Contact Center authentication and this field is left blank, the user will not be created. Maximum 16 characters.
User template	N	If this field is left blank, the default user template will be used; however, if a default user template has not been specified in the Manager application, the user will not be created. Maximum 32 characters.

Table 1

Fields required for each user record

## 4.3 About user profiles

A user profile is a set of default access permissions that can be used when configuring a particular type of user. For example, a user based on an Administrator profile can be given access to all Manager features and controls, but a user based on a Supervisor profile may be allowed to configure only users. You can create a user profile or use one of the default user profiles provided with the application.

### 4.3.1 Default user profiles

The Manager application is packaged with a set of default user profiles, which provide a wide range of roles and responsibilities. You can use these profiles as provided, or modify them to account for more specific permission requirements at your site.

#### 4.3.1.1 Manager user profiles

The system provides the following default user profiles for the Manager application:

- **Administrator** – The Administrator profile is intended for users who have limited administrative responsibilities. This profile provides access to all configuration items except those directly involved with contact routing and interaction with external resources, such as the communication platform. (Access to these items is provided in the Master Administrator profile.)
- **Manager** – The Manager profile is intended for users who are responsible for the overall contact center business targets, and are accountable for hiring and contact center performance. This profile provides access to reports that help the manager assess and measure performance.
- **Master Administrator** – The Master Administrator profile is intended for users who are responsible for configuring all the resources in OpenScape Contact Center. This profile provides full access to the system, including the ability to change all contact center settings.
- **Supervisor** – The Supervisor profile is intended for users who are responsible for the day-to-day supervision of contact center staff. Responsibilities include monitoring performance and ensuring customer satisfaction. This profile provides access to real-time communications and reporting.
- **Telecommunications Specialist** – The Telecommunications Specialist profile is intended for users, such as IT experts and administrators, who are responsible for providing support for the contact center and configuring the computer and voice aspects of OpenScape Contact Center. This profile provides access to system and voice settings.

#### 4.3.2 Configuring a user profile

You can create a new user profile or modify the existing profiles. For more information, see [Section 4.3, "About user profiles", on page 52](#).

---

**IMPORTANT:** Use care when assigning permissions. The ability for a user to create other users and change their permissions should be strictly controlled.

---

**NOTE:** To create or change a user profile, you must Full or Modify access, respectively, for the **Profiles** Manager permission. If the enhanced security option is enabled, you must also have the required security access to change the profile. For details on the enhanced security option, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).

---

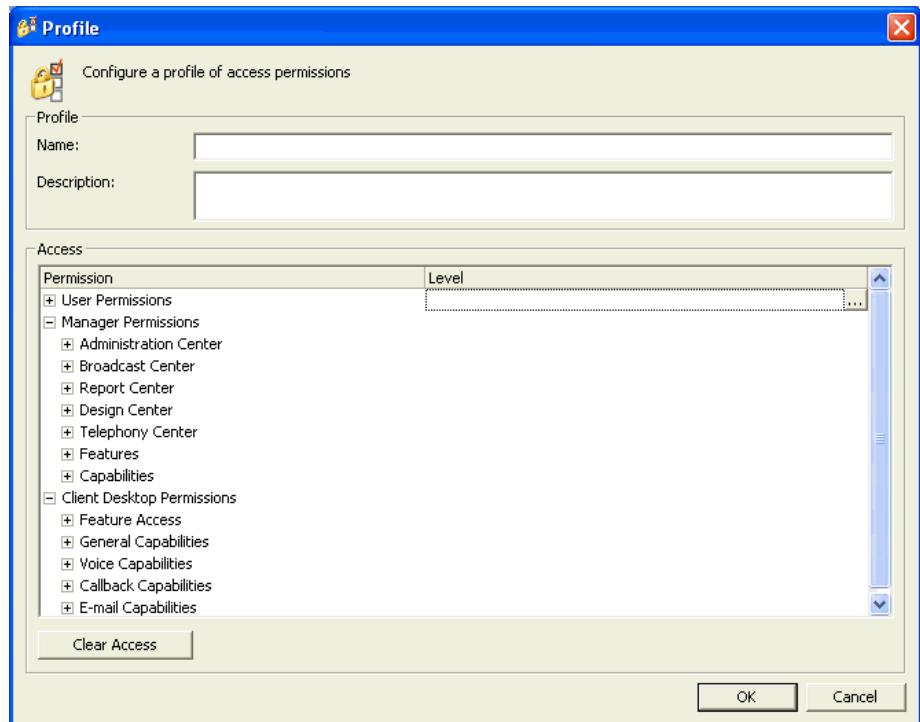
**To configure a user profile:**

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Profile**.

---

**NOTE:** To create a new profile based on a copy of a profile, in the **Administration Center**, under **General**, click **Profiles**, then, in the right pane, right-click the profile and select **Create Copy**.

---



2. On the **General** tab, under **Profile**, do the following:
  - In the **Name** box, type a unique name for the profile.
  - In the **Description** box, type a description for the profile. The description should explain what type of user should use this profile.
3. Under **Access**, by default, all the permissions are set to **No** or **No access**. For each permission you want to change, click the item in the **Level** column and select the new access level from the list. For details on the access levels, see [Section 4.3.3, "Access levels", on page 56](#).
4. To reset all access levels to **No** or **No Access**, click **Clear Access**.
5. Click the **Security** tab. This tab is available only if the enhanced security option is enabled. For details, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).

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6. Under **Users**, select the check box for each user who you want to be able to modify this profile. The list contains only the users who have Full or Modify access to the **Profiles** Manager permission.
7. Click **OK**.

### 4.3.3 Access levels

In OpenScape Contact Center, each user or user profile has a set of permissions, and for each permission, an access level that indicates the functions the user can perform with that permission.

---

**IMPORTANT:** Use care when assigning permissions. The ability for a user to create other users and change their permissions should be strictly controlled.

---

Some permissions are used for reading, modifying, and creating records in the database. The access levels for these permissions are:

- **No Access** – The user cannot view or modify the item.
- **Read Only** – The user can view, but not change, the item.
- **Modify** – The user can view and change the item.
- **Full** – The user can create, view, change, and delete the item.

Some features can only be turned on or off. The access levels for these permissions are:

- **No** – The user cannot access the feature.
- **Yes** – The user can access the feature.

If two or more profiles are selected for a user, the user's actual access level is the highest access level of the selected profiles. For example, if the access level in one of the profiles is **Full**, the user's actual access level will be **Full**.

When configuring a profile only, the **Restricted** access level is also available. Selecting **Restricted** for a permission in a profile means that when that profile is selected for a user, the user's actual access level will be **No** or **No Access** (as appropriate), even if you select another profile that has a higher access level.

# 5 Configuring other administration resources

Your service representative normally takes responsibility for creating and implementing the initial OpenScape Contact Center configuration. This includes the configuration of Administration Center resources, such as locations, servers, data sources, and directories. These items normally do not need to be reconfigured. However, you do need to configure departments and reasons, as described in this chapter, before putting your OpenScape Contact Center configuration into production.

---

**NOTE:** There are also some global options that normally need to be configured before putting your OpenScape Contact Center configuration into production. For more information, see [Chapter 15, "Configuring other global options"](#).

---

## 5.1 Configuring a department

A department is a collection of OpenScape Contact Center users that are grouped for reporting purposes. A department may be composed of several groups, or individual users from several groups.

---

**NOTE:** To create or change a department, you must have Full or Modify access, respectively, for the **Departments** Manager permission. If the enhanced security option is enabled, you must also have the required security access to change the department. For details on the enhanced security option, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).

---

### To configure a department:

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Department**.
2. On the **General** tab, under **Department**, do the following:
  - In the **Name** box, type a unique name for the department.
  - In the **Description** box, type a description for the department. The description of the department should clearly indicate the common element for the users in the department.
3. Click the **Users** tab.

## Configuring other administration resources

### Configuring a location

4. Under **Users**, select the check box for each user who you want to include in the department.
5. Click the **Reports** tab.
6. Under **Include**, select the check box for each report that you want to display data about this department. The list contains only the reports you own, or reports that are owned by users you can monitor.
7. Click the **Security** tab. This tab is available only if the enhanced security option is enabled. For details, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).
8. Under **Users**, select the check box for each user who you want to be able to modify this department. The list contains only the users who have Full or Modify access to the **Departments** Manager permission.
9. Click **OK**.

## 5.2 Configuring a location

You can configure a location for each geographical area that you want to associate with OpenScape Contact Center users or wallboards. Locations enable user reports to be generated based on the time zone of a user's location, and wallboards to display local time in the time zone of the wallboard's location.

---

**NOTE:** To create or change a location, you must have Full or Modify access, respectively, for the **Locations** Manager permission. If the enhanced security option is enabled, you must also have the required security access to change the location. For details on the enhanced security option, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).

---

#### To configure a location:

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Location**.
2. On the **General** tab, under **Location**, do the following:
  - In the **Name** box, type a unique name for the location.
  - In the **Description** box, type a description for the location.
  - In the **Time zone** list, select the time zone of the location.

3. Under **Contact**, do the following:

- In the **Name** box, type the name of the person responsible for the location. This person is usually the administrator who configures the OpenScape Contact Center database and provides technical support.
- In the **Telephone number** box, type the telephone number where the contact person can be reached.

4. Click the **Users** tab.

5. Under **Users**, select the check box for each user who you want to associate with this location.

---

**NOTE:** If you want to remove a user from a location, you must change the user's location in the user definition. For details, see [Section 4.1.1, "Configuring the general user properties", on page 27](#).

---

6. Click the **Wallboards** tab.

7. Under **Wallboards**, select the check box for each wallboard that you want to associate with this location.

8. Click the **Security** tab. This tab is available only if the enhanced security option is enabled. For details, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).

9. Under **Users**, select the check box for each user who you want to be able to modify this location. The list contains only the users who have Full or Modify access to the **Locations** Manager permission.

10. Click **OK**.

## Configuring other administration resources

### Configuring a location

#### 5.2.1 Configuring an Unavailable reason

An Unavailable reason is an explanation for a user entering Unavailable routing state. When the user is logged on to the communication platform, but is not available to handle incoming contacts, the user should select Unavailable routing state. Unavailable reasons are usually configured to handle common reasons for absences such as lunch breaks, and so on. The system will not route contacts to a user who is in Unavailable routing state.

---

**NOTE:** To create or change an Unavailable reason, you must have Full or Modify access, respectively, for the **Unavailable reasons** Manager permission.

---

---

**NOTE:** If you are using the OpenScape Contact Center Ring No Answer feature, the OpenScape Contact Center system places a user in Unavailable routing state if the user does not answer a routed contact. A default Unavailable reason is assigned to the change in routing state.

---

##### To configure an Unavailable reason:

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Unavailable Reason**.
2. In the **Name** box, type a unique name for the Unavailable reason.
3. In the **Description** box, type a description for the Unavailable reason.
4. Click **OK**.

## 5.2.2 Configuring a Work reason

A Work reason is an explanation for a user entering Work routing state. When the user is logged on to the communication platform, but is performing work tasks not associated with contacts, such as attending meetings or training sessions, the user should select Work routing state. The system will not route contacts to a user who is in Work routing state.

---

**NOTE:** To create or change a Work reason, you must have Full or Modify access, respectively, for the **Work reasons** Manager permission.

---

**To configure a Work reason:**

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Work Reason**.
2. In the **Name** box, type a unique name for the Work reason.
3. In the **Description** box, type a description for the Work reason.
4. Click **OK**.

## 5.2.3 Configuring a Post-processing reason

A Post-processing reason is an explanation for a user entering Post-processing handling state. A user is in Post-processing handling state when performing tasks after a contact has been disconnected, such as making notes or sending follow-up information.

Although users can explicitly enter Post-processing handling state, a user definition can also be set up to automatically place users in Post-processing handling state after they disconnect from a contact. For details, see [Section 4.1.1, “Configuring the general user properties”, on page 27](#).

---

**NOTE:** To create or change a Post-processing reason, you must have Full or Modify access, respectively, for the **Post-processing reasons** Manager permission.

---

## Configuring other administration resources

### Configuring a location

#### To configure a Post-processing reason:

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Post-processing Reason**.
2. In the **Name** box, type a unique name for the Post-processing reason.
3. In the **Description** box, type a description for the Post-processing reason.
4. Click **OK**.

### 5.2.4 Configuring a Wrap-up reason

A Wrap-up reason is an explanation of what a user did to complete a contact. For example, an indication that a sale was made, that a problem was solved, or that a customer record was updated. Historical reports monitor the Wrap-up reasons selected.

If the Wrap-up reason required option is selected for a user (see [Section 4.1.1, "Configuring the general user properties", on page 27](#)), the user must select at least one Wrap-up reason for each contact.

---

**NOTE:** To create or change a Wrap-up reason, you must have Full or Modify access, respectively, for the **Wrap-up reasons** Manager permission.

---

#### To configure a Wrap-up reason:

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Wrap-up reason**.
2. On the **General** tab, under **Details**, do the following:
  - In the **Name** box, type a unique name for the Wrap-up reason.
  - In the **Description** box, type a description for the Wrap-up reason.
3. Click the **Queue** tab.
4. Under **Queue**, select the check box for each queue that you want to associate with this Wrap-up reason.
5. Click **OK**.

## 5.3 About the servers

The OpenScape Contact Center system uses the following servers:

- Administration Server
- Callback Server (only if the callback feature is activated)
- Call Director Server (only if the Call Director feature is activated)
- Config Sync Server
- Data Management Server
- E-mail Server (only if the e-mail feature is activated or the e-mail reports option is enabled)
- Presence Server
- Real-Time Server
- Reporting Server
- Routing Server
- Statistics Server
- T-Server
- Watchdog Server
- Web Interaction Server

---

**NOTE:** Some features that have been activated using a license file must be enabled before they can be used. For details, see "[Enabling activated features](#)".

---

You can configure the server properties, and create notifications used to advise the administrator if there is a problem with any of the servers.

---

**NOTE:** When you upload a design database, the system overwrites the host name of all servers that share the same host as the Administration Server with the host name of the server machine on which the production database resides. This ensures that the host name of the server is always configured correctly.

---

### 5.3.1 Configuring the server properties

For all the OpenScape Contact Center servers, except the Watchdog Server, you can change the name, host name, and port number of the server resource. To configure the properties of a Watchdog Server, see [Section 5.3.2, "Configuring a Watchdog Server", on page 59](#).

---

**NOTE:** To create or change a server resource, you must have Full or Modify access, respectively, for the **Servers** Manager permission.

---

---

**NOTE:** When you are connected to the production database, if you change the server properties, you will be required to restart the OpenScape Contact Center service on the main server machine.

---

**To configure the properties of a server:**

1. In the **Administration Center**, under **Resources**, click **Servers**.
2. In the right pane, double-click the server you want to change.
3. In the **Name** box, type the new name of the server.
4. In the **Host name** box, type the host name of the server machine where the server resides. You can type a maximum of 15 characters.
5. In the **Port number** box, type the port number of the server on the server machine.

---

**NOTE:** If a firewall is enabled on the server machine and you change the port number of a server after the initial system configuration, you must reconfigure the firewall settings.

---

6. Click **OK**.

## 5.3.2 Configuring a Watchdog Server

The application automatically creates a Watchdog Server on every machine where an OpenScape Contact Center server is installed. The Watchdog Server starts and monitors all other OpenScape Contact Center servers and issues notifications.

You can change the name and port number of a Watchdog Server, but you cannot change the host name. The application automatically changes the host name of the Watchdog Server if you change the host name of the server machine where the Watchdog Server resides.

---

**NOTE:** To change a Watchdog Server, you must have Modify access for the **Servers** Manager permission.

---

---

**NOTE:** When you are connected to the production database, if you change the server properties, you will be required to restart the OpenScape Contact Center service on the main server machine.

---

### To configure a Watchdog Server:

1. In the **Administration Center**, under **Resources**, click **Servers**.
2. In the right pane, double-click the Watchdog Server you want to change.
3. In the **Name** box, type the new name of the server.
4. In the **Port number** box, type the identifier used to distinguish the connections for the host.

Click **OK**.

### 5.3.3 Configuring a notification

To ensure that administrators are kept informed of the system status, you can configure automatic notifications. You can configure the system to send an e-mail message or a page to an individual if there is a problem with the database usage or one of the OpenScape Contact Center servers.

---

**NOTE:** To create or change a notification, you must have Full or Modify access, respectively, for the **Notifications** Manager permission.

---

For e-mail notifications, the sender address is "OpenScape\_Contact\_Center". If the SMTP server is configured to authenticate the sender as part of its security measures, you must ensure that the server machine is allowed to send e-mail messages using "OpenScape\_Contact\_Center" as the "from address".

**To configure a notification:**

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Notification**.
2. On the **General** tab, under **Notification**, do the following:
  - a) In the **Condition** list, select one of the following conditions:
    - **Database Usage** – Indicates that there is not enough disk space available to store the data that will be generated over the next two weeks, based on the configured retention periods. For details on the data retention periods, see [Section 15.6, "Configuring the data management options", on page 277](#).
    - **Server Down** – Indicates that the server is not operational.
    - **Server Response Time** – Indicates that the server response time is longer than expected.
    - **Server Up** – Indicates that the server is operational again.
  - b) In the **Component** list, select the server that you want to monitor.
3. Under **Type**, in the **Notification method** list, select the type of notification you want to use: **E-mail** or **Pager**.

4. If you selected **E-mail** in step 3, under **Details**, configure the e-mail message as follows:
  - a) In the **E-mail address** box, type the e-mail address to which the notification should be sent.
  - b) In the **Message** box, type the message you want to send to the specified e-mail address.
  - c) In the **SMTP server** box, type the host name of the machine where the SMTP server resides.
5. If you selected **Pager** in step 3, under **Details**, configure the pager as follows:
  - a) In the **Pager number** box, type the number of the pager to be called.
  - b) In the **Numeric code** box, type the code for the selected condition. For example, if the digits 111 are dialed, then a numeric code appears on the pager.
  - c) In the **Number of attempts** box, select the number of times you want the pager to be contacted.
  - d) In the **Retry interval** box, select the length of time that you want to wait between attempts to contact the pager.
  - e) In the **Message delay** box, select the length of time that elapses between the time when the pager number is dialed and the digits for the numeric code are sent.
6. To test the configured notification, click **Test**.
7. Click **OK**.

**Setting up notifications on a system without email license:**

1. Login on Manager system:

Go to: **Tools > Options > System Settings > Reporting**

2. Enable the Email report feature:

Locate the option to enable email reporting.

**Email-Reports > Enable**

Enabling this feature will start the Email Server.

3. Navigate back to the system settings for email configuration:

**Tools > Options > System Settings > System**

## Configuring other administration resources

### Configuring a data source

4. Enable the Corporate SMTP Server authentication by adding an email address and password as described on [Chapter 15, "Configuring the e-mail server settings"](#)

## 5.4 Configuring a data source

You can access information in an external ODBC-compliant database, and then use that information in a Database Function component to help make decisions about contact routing. You must ensure that the external database provides mappings to ODBC-compliant data types.

To access an external ODBC-compliant database, you must do the following on the OpenScape Contact Center server machine:

- In Windows, configure an ODBC data source that connects to the external database. Since the OpenScape Contact Center system is a 32-bit system, only 32-bit ODBC data sources are supported.
- In the Manager application, configure a data source definition for each ODBC data source that you want to access.

---

**NOTE:** To create or change a data source definition, you must have Full or Modify access, respectively, for the **Data sources** Manager permission.

---

---

**NOTE:** A slow connection to a data source will affect contact center performance. Ensure that any data sources you connect to will not adversely affect the productivity of your contact center.

---

### To configure a data source:

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Data Source**.
2. Under **Details**, do the following:
  - In the **Data source name** box, type the name of the data source. To locate the required data source name, click **Find**.
  - In the **Maximum connections** box, specify the maximum number of connections available to this data source.

3. Under **Access**, do the following:
  - In the **User ID** box, type the User ID of the user who can connect to this data source.
  - In the **Password** box, type the password for the User ID.
4. To test the connection to the data source, click **Test**.
5. Click **OK**.

## 5.5 Configuring a directory

You can configure a directory resource in the Manager application to provide access to an external LDAP directory. The LDAP directory can then be used to search for information, such as a name, telephone number, or e-mail address. In the Manager application, the external directory is used to select recipients when sending reports by e-mail. You can configure up to two directories for use in the Manager application.

---

**NOTE:** The connection between the client applications and the LDAP Server can be encrypted by using LDAPS (LDAP over TLS).

---

**NOTE:** To create or change a directory, you must have Full or Modify access, respectively, for the **Directories** Manager permission.

---

### To configure a directory:

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Directory**.
2. On the **General** tab, under **Directory**, do the following:
  - In the **Name** box, type the name of the directory.
  - In the **Description** box, type a description for the directory.

## Configuring other administration resources

### Configuring a directory

3. Under **Connection**, do the following:

- In the **Host name** box, type the host name of the directory server.
- In the **Port number** box, type the TCP/IP port number of the directory server. The default value is **389**.

---

**NOTE:** To enable LDAPS, set the Port Number to **636**. For the Agent Portal Web check the flag in **Settings > Directories > Setup Connection > TLS**.

---

- To test the logon to the directory server, click **Test**. You must enter the account name and password to access the directory server.

---

**NOTE:** This tests the connection from this server machine, not from the client machine.

---

4. Click the **Query** tab.

5. Under **Fields**, do one of the following:

- To configure a new directory field to be queried, click **Add**, and then configure the field.
- To modify an existing directory field to be queried, select the directory field in the list, click **Edit**, and then configure the field.
- To delete an existing directory field, select the directory field in the list and click **Delete**.

---

**NOTE:** The top to bottom order of the fields in the list reflects the order in which the fields are displayed in the Manager application. To change the order of the fields, click anywhere in a row to select the row, and then click the up or down arrow key to the right of the list to move the row up or down, respectively.

---

6. Under **Query String**, specify the components of the query string used to locate entries in the directory:

- In the **Base distinguished name** box, type the base distinguished name to be used as the starting point for the query. The base distinguished name contains one or more Attribute Name and Attribute Value strings separated by the "=" character, for example, **ou=sales, o=mycompany.com**.

- In the **Scope** list, select the scope of the query from the list: **Base**, **One Level**, or **Subtree**.
- In the **Object class** box, type the list of object classes to be used to filter the query. The object classes in the list must be separated by commas.
- In the **Object categories** box, type the list of object categories to be used to further filter the query. The object categories in the list must be separated by commas.

7. Click the **Results** tab.

8. Under **Fields**, do one of the following:

- To configure a new directory field to be displayed in the search results, click **Add**, and then configure the field.
- To modify a directory field to be displayed in the search results, select the directory field in the list and click **Edit**, and then configure the field.
- To delete an existing directory field, select the directory field in the list and click **Delete**.

9. Click **OK**.

## **Configuring other administration resources**

### Configuring a directory

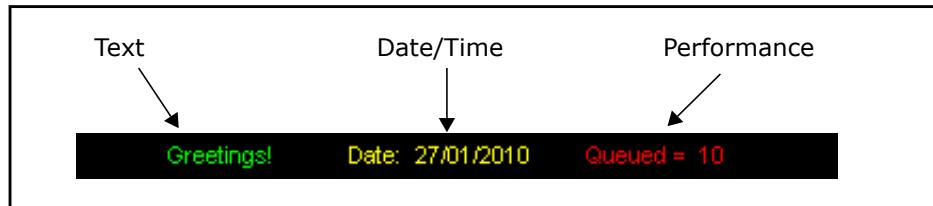
# 6 Using the Broadcaster and wallboards

Managers and supervisors can broadcast information to contact center users in the following way:

- To wallboards in the contact center (see [Section 6.1, "About wallboards", on page 67](#))

You can display the following types of content:

- **Text** – Text can be used alone or in combination with date/time variables and statistics to provide a label for the variable or statistic. For example, if you include a date variable in a view, you could include the text **Today's date is**.
- **Date/Time variables** – Date and time variables display the current date or time, updated in real time.
- **Performance statistics** – Real-time statistics on various contact center resources are received from the OpenScape Contact Center servers and are updated in real time.



Each collection of content is referred to as a view. You broadcast these views to defined groups of users or wallboards, called distributions. The view/distribution mechanism lets you define content aimed at specific users, and broadcast either directly to those users or to particular wallboards. In a simple setup, you may have distributions based on your queue setup or users grouped according to their supervisor.

Each Broadcaster or wallboard can display only one view.

## 6.1 About wallboards

A wallboard is a display medium located in your contact center where several users can view information.

Wallboards have the following features:

- Multiple lines – Select the line on which the variable appears. You can synchronize lines, so that the statistic name appears above its value.

## Using the Broadcaster and wallboards

### About wallboards

- Text color – Select the color used to display the text (if supported by the wallboard model). For tri-color boards, the colors displayed are red, yellow and green.
- Scroll direction – Select the horizontal scroll direction. You can choose from Scroll left, Scroll left and hold, Scroll right and hold, Stationary and hold, or Flash and hold.

The system supports several Spectrum wallboard models using the EZ Key II protocol. For a list of supported wallboard models, and instructions on installing and configuring a wallboard, see the *System Management Guide*. If you have an unsupported wallboard model, you can create a custom wallboard type (see [Section 6.1.1, "Creating a wallboard type", on page 68](#)).

Read your wallboard documentation to determine the exact features supported by your particular wallboard. Ensure that you have downloaded the latest firmware for your wallboard.

### 6.1.1 Creating a wallboard type

The system provides default wallboard types for several Spectrum wallboard models. If you have an unsupported wallboard model, you can create a custom wallboard type that you can select when creating a wallboard definition or configuring a wallboard view.

---

**NOTE:** To create or change a custom wallboard type, you must have Full or Modify access, respectively, for the **Wallboard types** Manager permission.

---

#### To create a wallboard type:

1. On the **File** menu, point to **New**, then **Broadcast Center**, then **Wallboard**, and then click **Type**.
2. Under **Type**, do the following:
  - In the **Name** box, type the name used to identify the wallboard type.
  - In the **Description** box, type a description for the custom wallboard, including the length and model of the wallboard.
3. Under **Specifications**, do the following:
  - In the **Lines** list, select the number of lines that can be displayed on the wallboard.

- In the **Characters** list, type or select the number of characters that can be displayed on each line of the wallboard.
- If the wallboard type supports three colors, select the **TriColor** check box.

4. Click **OK**.

### 6.1.2 Creating a wallboard definition

A wallboard definition contains the name and description of the wallboard, the hardware settings for the wallboard, and the wallboard distribution. The definition normally describes the physical location of the wallboard in the contact center, for example, **third floor, south wall**.

While supervisors and managers are typically involved in configuring wallboard views and distributions, wallboard definitions are typically configured by the service technician. For detailed instructions, see the *System Management Guide*.

---

**NOTE:** To create or change a wallboard definition, you must have Full or Modify access, respectively, for the **Wallboard definitions** Manager permission.

---

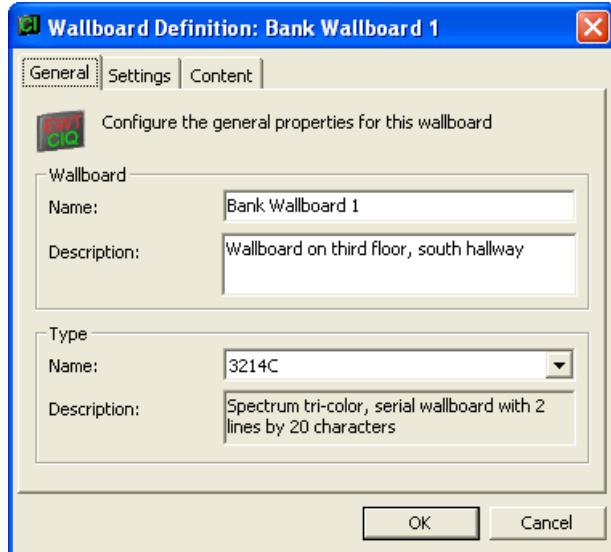
Before you begin, check the list of Wallboard types in the Broadcast Center to ensure that the type of wallboard you want to use is already configured. If the type of wallboard you have is not in the list, create a custom wallboard type (see [Section 6.1.1, “Creating a wallboard type”, on page 68](#)).

## Using the Broadcaster and wallboards

### About wallboards

#### To create a wallboard definition:

1. On the **File** menu, point to **New**, then **Broadcast Center**, then **Wallboard**, and then click **Definition**.



2. Under **Wallboard**, do the following:
  - In the **Name** box, type a unique name for the wallboard.
  - In the **Description** box, type a description for the wallboard. Use the description to specify the physical location of the wallboard.
3. Under **Type**, in the **Name** list, select the wallboard type. After you select the wallboard type, the properties of the wallboard are shown in the **Description** box.
4. Click the **Settings** tab.
5. Under **Connection**, do the following:
  - In the **Host name** box, type the host name or IP address of the wallboard.
  - In the **Port number** box, type the port number of the wallboard. The port number indicates the connection to the wallboard on the OpenScape Contact Center server machine.
  - If you are connected to a production database, you can click **Test** to verify the configuration. If the test fails, check the host name or IP address and the port number of the wallboard.
  - In the **Location** list, select the location of the wallboard. The default is the location where the Manager application is installed.
6. Click the **Content** tab.

7. In the **Distribution** list, select a distribution. If there are no distributions listed, you can add this wallboard to a distribution when you create a wallboard distribution (see [Section 6.1.4, "Configuring a wallboard distribution", on page 78](#)).
8. Click **OK**.

### 6.1.3 Configuring a wallboard view

You can create different views that can be displayed on a wallboard. For more information, see [Section 6.1, "About wallboards", on page 67](#).

---

**NOTE:** To create or change a wallboard view, you must have Full or Modify access, respectively, for the **Wallboard views** Manager permission.

---

#### Overview

The following is an overview of the steps required to configure all the attributes in a wallboard view:

1. Configure the general information – see [Section 6.1.3.1, "Configuring the general information for a wallboard view", on page 71](#).
2. Configure the content – see [Section 6.1.3.2, "Configuring the content of a wallboard view", on page 73](#).
3. Configure a threshold for a wall board item – see [Section 6.1.3.4, "Configuring a threshold for a wallboard view item", on page 76](#).
4. Configure the distribution for a wallboard view – see [Section 6.1.3.5, "Configuring the distribution for a wallboard view", on page 77](#).

#### 6.1.3.1 Configuring the general information for a wallboard view

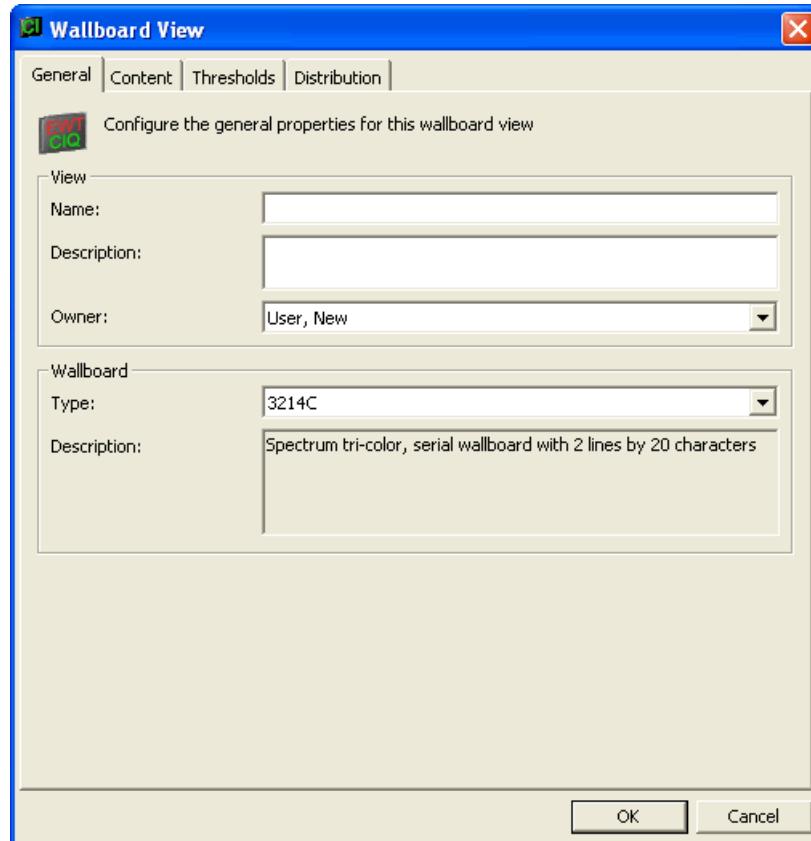
You can configure the name, description, owner and wallboard type for each wallboard view.

## Using the Broadcaster and wallboards

### About wallboards

#### To configure the general information for a wallboard view:

1. On the **File** menu, point to **New**, then **Broadcast Center**, then **Wallboard**, and then click **View**.



2. Under **View**, do the following:
  - In the **Name** box, type a unique name for the view.
  - In the **Description** box, type a description of the view. Use the description to specify the information displayed in the wallboard view.
  - In the **Owner** list, click a user name. The owner is the only user, other than the Master Administrator, who can modify the properties of this view. You can select your own name or any other user who you can monitor. The owner can see only the users, groups, or queues in the view which the owner can monitor.
3. Under **Wallboard**, in the **Type** list, select the wallboard type for which you are configuring the view. After you select the wallboard type, the properties of the wallboard are shown in the **Description** box.

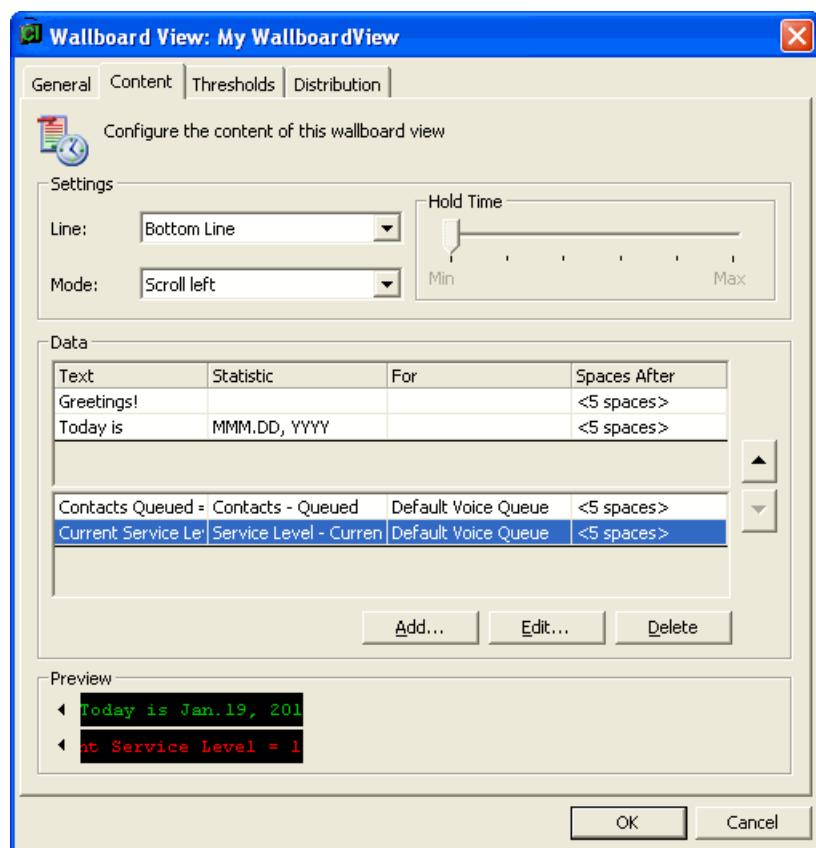
4. If you are finished working with this view definition, click **OK**.

### 6.1.3.2 Configuring the content of a wallboard view

You can configure a wallboard view to display text or statistics. Changes that you make to a wallboard view occur immediately and affect the users who are viewing the wallboard.

#### To configure the content of a wallboard view:

1. In the **Broadcast Center**, under **Wallboard**, click **Views**.
2. In the right pane, double-click the wallboard view for which you want to configure the content.
3. Click the **Content** tab.



## Using the Broadcaster and wallboards

### About wallboards

4. Under **Settings**, in the **Line** list, select the line in the wallboard view for which you want to configure the content. Your choices are: **Top Line** and **Bottom Line**.

---

**NOTE:** The system supports the use of wallboards that have up to four lines, but the EZ Key II Protocol can only address the lines as Top Line and Bottom Line. So in the case of a three-line or four-line wallboard, the wallboard uses all its lines minus one to display the content defined in the Top Line. The Bottom Line begins immediately following the last line of the Top Line. For example, if the content configured in the Top Line takes up only two lines of a four-line wallboard, the content configured in the Bottom Line will start on the third line of the wallboard.

---

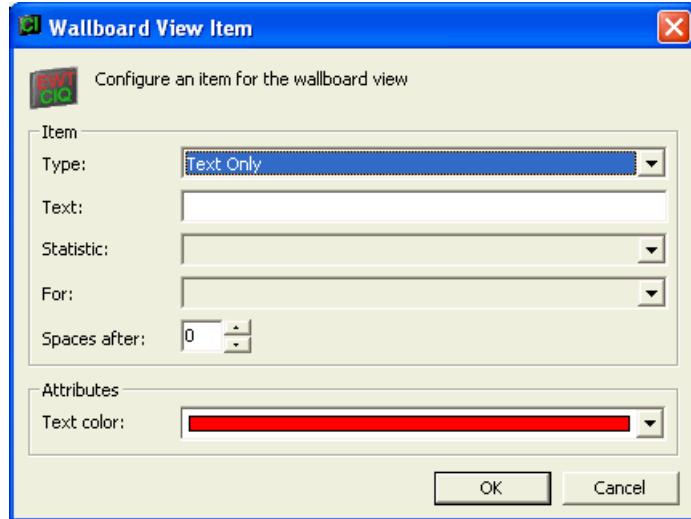
5. In the **Mode** list, select the scroll direction and action you want to use:
  - **Scroll left** – Continuously moves text to the left.
  - **Scroll left and hold** – Holds text on the screen for a specified amount of time before scrolling left.
  - **Scroll right and hold** – Holds text on the screen for a specified amount of time before scrolling right.
  - **Stationary and hold** – Holds text stationary for the specified amount of time. For large quantities of text, groups of characters are displayed for the specified amount of hold time.
  - **Flash and hold** – Continuously flashes text.
6. If you selected a mode that contains a hold action, under **Hold Time**, move the slider to specify the length of time an item pauses at the center of the wallboard.
7. Under **Data**, do one of the following:
  - To add a new wallboard item, click **Add**.
  - To edit an existing wallboard item, select the item in the list and click **Edit**.
8. Configure a wallboard view item (see [Section 6.1.3.3, “Configuring a wallboard view item”, on page 75](#)).
9. Repeat steps 7 and 8 for each item you want to configure.
10. The **Preview** area shows the contents of the wallboard view. The selected scrolling action is shown, but not the selected hold action.
11. If you are finished working with this view definition, click **OK**.

### 6.1.3.3 Configuring a wallboard view item

You can configure a wallboard view item to display text, date and time variables, and performance statistics.

**To configure a wallboard view item:**

1. Open the **Wallboard View Item** dialog box.



2. Under **Item**, in the **Type** list, select one of the types provided. You can choose **Text Only** or one of several different variable types.
3. In the **Text** box, type the text to display on the wallboard.
4. If you selected a variable type, use the **Statistic** box to select the statistic you want to display on the wallboard view. You can configure the threshold for each threshold-eligible statistic that you select.
5. If you selected a Group, Queue or Aggregate variable type, use the **For** box to select the queue, group, or aggregate for which to display the statistic. You can select only the queues, groups, or aggregates that you and the owner of the view can monitor.
6. In the **Spaces after** box, type or select the number of spaces that you want to insert after the item in the wallboard view.
7. Under **Attributes**, select a **Text color** to apply to the item.
8. Click **OK**.

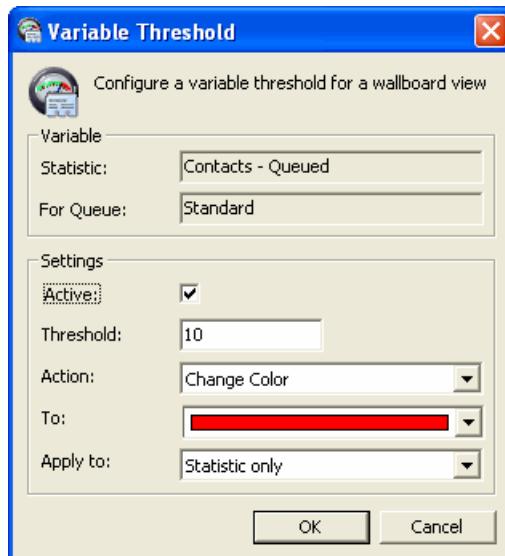
#### 6.1.3.4 Configuring a threshold for a wallboard view item

You can configure a threshold for each statistic shown on the wallboard view. When a threshold is exceeded, you can display the statistic name in a different color (for tri-color wallboard types), or display text on the other line of the wallboard.

Before you can configure a threshold for a statistic, the wallboard view must be configured to display the statistic (see [Section 6.1.3.3, "Configuring a wallboard view item", on page 75](#)).

**To configure a threshold for a wallboard view item:**

1. In the **Broadcast Center**, under **Wallboard**, click **Views**.
2. In the right pane, double-click the wallboard view you want to configure.
3. Click the **Thresholds** tab.
4. Under **Items**, select the statistic for which you want to configure a threshold. The Items list contains only the statistics specified on the Contents tab for which you can set a threshold.
5. Click **Edit**. The **Statistic** and **For** boxes show the statistic you selected. You cannot edit them here.



6. Under **Settings**, select the **Active** check box. This enables you to configure the threshold. After the threshold has been configured, you can use the **Active** check box to activate or de-activate the threshold in the wallboard view.

7. In the **Threshold** box, specify the limit to which you want to compare the statistic. The statistic determines if this value is a maximum or minimum.
8. In the **Action** list, select the action that alerts users to the exceeded threshold:
  - **Change color** – In the **To** list, select the color to display.
  - **Show text** – In the **Text** box, type the text to display.
9. In the **Apply to** list, select whether to apply the threshold condition to the **Statistic only** or the **Entire item** (including text labels).
10. Click **OK**. The information you entered is displayed on the **Thresholds** tab. If the threshold is inactive, **None** appears under Threshold for the Statistic in the Items list.
11. If you are finished working with this view definition, click **OK**.

### 6.1.3.5 Configuring the distribution for a wallboard view

You can assign a wallboard view to specific wallboard distributions.

---

**NOTE:** You must create the wallboard distributions before you can select them in a view (see [Section 6.1.4, "Configuring a wallboard distribution", on page 78](#)).

---

#### To configure the distribution for a wallboard view:

1. In the **Broadcast Center**, under **Wallboard**, click **Views**.
2. In the right pane, double-click the wallboard view for which you want to specify the distribution.
3. Click the **Distribution** tab.
4. Under **Send to**, select the check box for each wallboard distribution where you want to send the view.
5. If you are finished working with this view definition, click **OK**.

#### 6.1.4 Configuring a wallboard distribution

A wallboard distribution is a group of wallboards to which you can assign a single wallboard view (see [Section 6.1.3, "Configuring a wallboard view", on page 71](#)). After you create a wallboard distribution and assign a view to it, the view can be displayed on the selected wallboards.

Each wallboard can be a member of only one distribution at a time because only one view can be displayed on each wallboard.

---

**NOTE:** To create or change a wallboard distribution, you must have Full or Modify access, respectively, for the **Wallboard distributions** Manager permission.

---

##### To configure a wallboard distribution:

1. On the **File** menu, point to **New**, then **Broadcast Center**, then **Wallboard**, and then click **Distribution**.
2. Under **Distribution**, do the following:
  - In the **Name** box, type a unique name for the distribution.
  - In the **Description** box, type a description of the distribution.
3. Under **Current**, in the **View** list, select the wallboard view that you want to be displayed on all the wallboards in the distribution.
4. Click the **Wallboards** tab.
5. Under **Include**, select the check box for each wallboard where you want to display the current wallboard view.
6. Click **OK**.

# 7 Reporting

You can use the Manager reporting feature to view performance data which can help you resolve issues, evaluate the efficiency of your contact center, and optimize your OpenScape Contact Center configuration. Reporting provides real-time statistics, accumulated statistics for the current day, and historical statistics on various contact center resources. Options range from online views showing the current status of particular resources to traditional statistical summaries.

Real-time view showing the current status of a queue

Statistical summary with totals, rollups, and an interval

↓

Name	Contacts		Service Level		Wait Time
	Queued	Current	Estimated	Estimated Answer	
Mutual Funds-DIV	0	100.0	100.0	00:00:23	
Mutual Funds-EQU	1	83.0	77.0	00:02:53	
Stocks	2	100.0	83.0	00:02:45	
	3	81.0	86.0	00:01:00	

Name	Offered Contacts		Handled Contacts		Abandoned		Offered Co...		Total Time			
	All	All	All	Routed	Logged On	Idle	Busy	Away				
A1	9	8	1	1:01:18:34	19:57:09	00:00:00	05:17:08					
19/01/2010	6	5	1	02:04:34	00:36:02	00:00:00	01:27:05					
14:00	1	1	0	00:37:27	00:18:37	00:00:00	00:18:22					
15:00	2	1	1	00:58:02	00:14:20	00:00:00	00:43:30					
16:00	3	3	0	00:29:05	00:03:05	00:00:00	00:25:13					
21/01/2010	3	3	0	13:08:38	09:15:45	00:00:00	03:50:03					
22/01/2010	0	0	0	10:05:22	10:05:22	00:00:00	00:00:00					
	9	8	1	1:01:18:34	19:57:09	00:00:00	05:17:08					

32 Items

There are four main types of reports:

- **Real-time** – see [Section 7.1, “About real-time reports”, on page 80.](#)
- **Historical** – see [Section 7.2, “About historical reports”, on page 83.](#)
- **Cumulative** – see [Section 7.3, “About cumulative reports”, on page 85.](#)
- **Activity** – see [Section 7.4, “About activity reports”, on page 86.](#)

## Reporting

### About real-time reports

The Manager application provides a set of predefined report definitions that can be used as is, or as the basis for creating new reports. For detailed information on the report types, the predefined reports, and the content that can appear in reports, see the *Reporting Reference Guide*.

---

**NOTE:** You can report on resources for which you have been assigned monitoring permission only. For more information, see [Section 7.5, "Monitoring permissions and reporting", on page 87](#).

---

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**NOTE:** You cannot run reports while the system performs data maintenance. For more information, see [Section 7.13.3, "Configuring the queue real-time report options", on page 141](#).

---

## 7.1 About real-time reports

Real-time reports are reports that are viewed online to monitor the current status of the following resources:

- Users
- Groups
- Contacts
- Callbacks
- Queues and aggregates

The data displayed in a real-time report is updated in real time. You can use the reports to help you make minute-to-minute decisions, for example, you can monitor activities in a group of users to evaluate if their workload indicates a need for more users. For a description of the statistics available, refer to the *Reporting Reference Guide*.

Real-time reports have an alarm mechanism to alert you to key column values in the report. For columns that have numeric or elapsed time values, you can set a threshold condition. For example, on a Contacts - Queued column you could set a threshold condition to trigger an alarm when the number of contacts in queue is greater than five.

---

**NOTE:** User real-time reports are available only if your site is operating with a reporting level of Full (see [Section 7.6, "Reporting level", on page 88](#)).

---



---

**NOTE:** You can configure the application to include ringing and unanswered contacts in queue real-time reports. For details, see [Section 7.13.3, "Configuring the queue real-time report options", on page 141](#).

---

For example, a key piece of information in a contact center is the number of contacts currently waiting in queue. If you wanted to monitor contacts waiting at the queue level, you could use a queue real-time report.

Example: Queue Status Report				
Name	Contacts	Service Level		Wait Time
	Queued	Current	Estimated	Estimated Answer
Mutual Funds-DIV	0	100.0	100.0	00:00:23
Mutual Funds-EQU	1	83.0	77.0	00:02:53
Stocks	2	100.0	83.0	00:02:45
	3	81.0	86.0	00:01:00

This report shows current contact waiting totals for a set of queues. Details for each queue include:

- The number of contacts waiting in that queue.
- The current service level based on the last 24 contacts and an estimated service level.
- The estimated time that a contact received will wait before being answered.

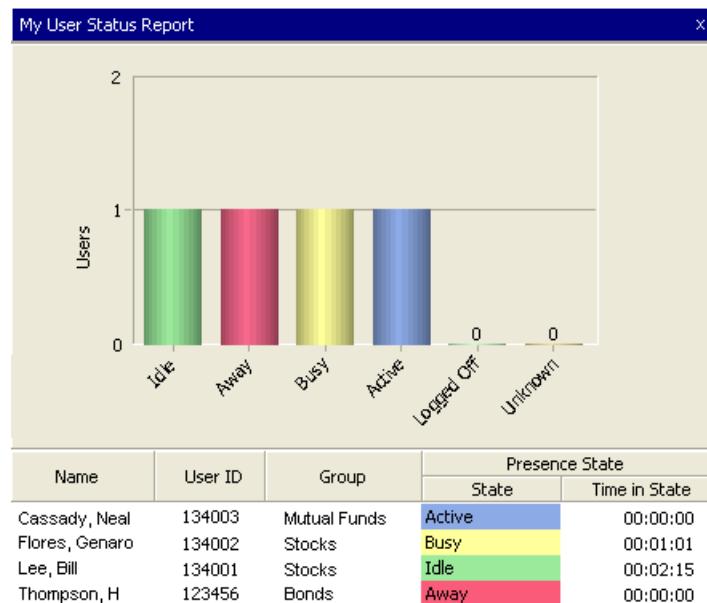
The highlighting on the Contacts - Queued column is an alarm mechanism that provides a visible or audible alarm to problem situations. Each real-time report subtype provides a set of columns for which you can set alarms. When setting up a report, you can define up to three different thresholds on a particular column. A different alarm can be displayed or sounded whenever each threshold value is exceeded. In a real life situation, the alarm on the Contacts - Queued

## Reporting

### About real-time reports

column might mean nothing more than an unusually busy day. You might use this information to take immediate action, for example, to have more users become available.

Alternatively, you may want to use the group real-time report as the first step in tracking down a problem. If you wanted more detail on what was going on with a problem queue, you could generate a user real-time report on users associated with that queue:



This report includes a bar chart, which consists of a bar graph representation of one statistic at the top of the report. When you create a real-time report, you have the option of including tabular information, chart information, or both.

In general, information in real-time reports can be helpful in identifying the following requirements and problems:

- Additional staffing
- User training
- Queuing bottlenecks
- Configuration changes such as reallocation of users among groups

## 7.2 About historical reports

Historical reports provide statistical summaries on the performance of specific resources over a specified time period. Historical reports are commonly used to evaluate or assess contact center performance, configuration efficiency, and the productivity of individual queues and users. Statistics are available at user, department, and site levels. For a description of the statistics available, refer to the *Reporting Reference Guide*.

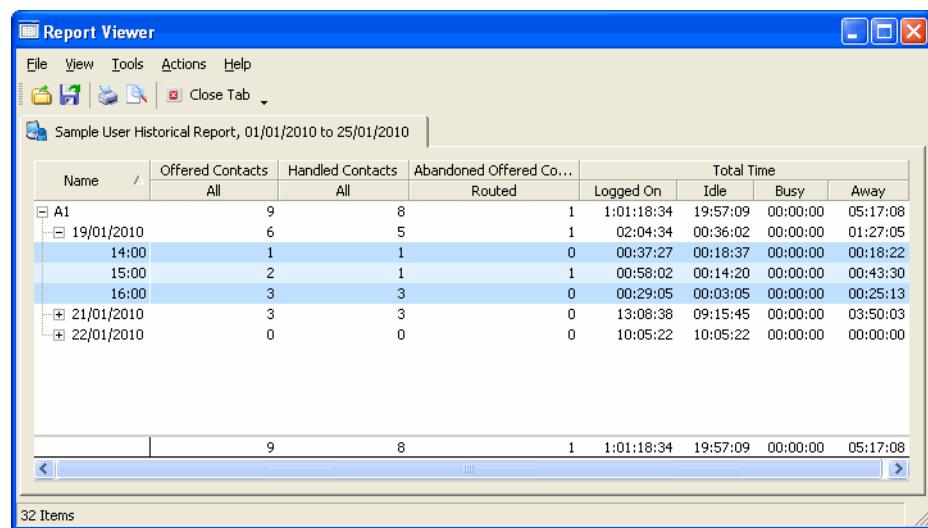
The resources that can be monitored in historical reports are:

- Users
- Groups
- Contacts
- Callbacks
- Queues
- Destinations
- Workflows
- Call Director components
- Wrap-up reasons
- Routing state reasons
- Post-processing reasons

## Reporting

### About historical reports

While common ranges for historical reports are daily, weekly, and monthly, you can also specify custom ranges. Within the range of a report, you can further break down the statistics for display by specified intervals. The report shown below is a daily report broken down into hourly intervals.



Name	Offered Contacts	Handled Contacts	Abandoned Offered Co...	Total Time			
	All	All	Routed	Logged On	Idle	Busy	Away
A1	9	8	1	1:01:18:34	19:57:09	00:00:00	05:17:08
19/01/2010	6	5	1	02:04:34	00:36:02	00:00:00	01:27:05
14:00	1	1	0	00:37:27	00:18:37	00:00:00	00:18:22
15:00	2	1	1	00:58:02	00:14:20	00:00:00	00:43:30
16:00	3	3	0	00:29:05	00:03:05	00:00:00	00:25:13
21/01/2010	3	3	0	13:08:38	09:15:45	00:00:00	03:50:03
22/01/2010	0	0	0	10:05:22	10:05:22	00:00:00	00:00:00
	9	8	1	1:01:18:34	19:57:09	00:00:00	05:17:08

Historical reports provide three scheduling options: run the report immediately, run the report once only at a specified date and time, or run the report on a regular basis. If you choose to run a report on a regular basis, you can also specify the frequency.

---

**NOTE:** The maximum number of database records that can be used to generate a historical report is 60,000 (10,000 if the report includes contact record details). If the number of database records used to generate a report exceeds these limits, the report will fail. The failed report will appear in the **Failed** folder with a message indicating that the number of records used to generate the report exceeded the maximum. To generate the report successfully, you must select fewer resources to report on, reduce the range of the report to cover a shorter time period, or select a longer interval.

---

## 7.3 About cumulative reports

Cumulative reports combine the “current status” benefits of real-time reports with the detailed statistics and rollup availability of historical reports.

The key differences between cumulative reports and historical reports are:

- Cumulative reports are online reports and cannot be scheduled.
- Cumulative reports show statistics for the current 24-hour period up until the last hourly or 15-minute interval defined for the report.
- When the next hourly or 15-minute interval passes, statistics for that interval for all included resources are added to the report in real time. In addition to the statistics for the new interval, totals at the department and site level are also updated.
- The charted statistic in a cumulative report can include a trend line that lets you compare current day intervals with the same intervals from the previous day or the same day last week.

For a description of the statistics available, refer to the *Reporting Reference Guide*.

The resources that can be monitored in cumulative reports are:

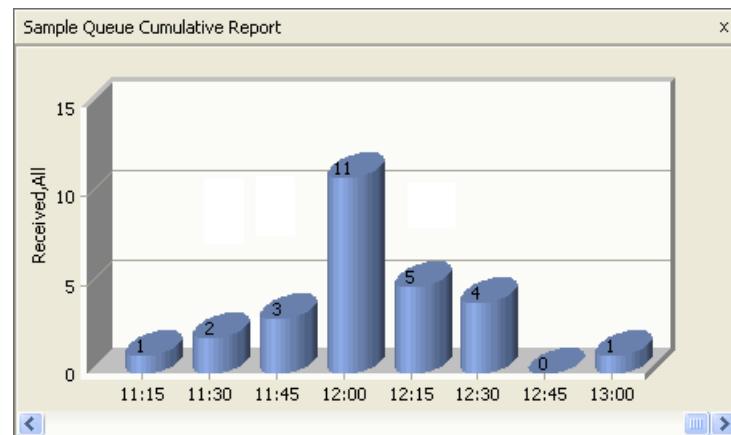
- Users
- Groups
- Callbacks
- Queues
- Destinations
- Workflows
- Call Director components
- Wrap-up reasons
- Routing state reasons
- Post-processing reasons

Cumulative reports have an alarm mechanism to alert you to key column values in the report. For columns that have numeric or elapsed time values, you can set a threshold condition. For example, on a Contacts - Queued column you could set a threshold condition to trigger an alarm when the number of contacts in queue is greater than five.

## Reporting

### About activity reports

The cumulative reports mechanism is designed to provide flexible, multipurpose reporting that complements historical and real-time reports. On a daily basis, you might use a report such as the one shown below to monitor contact center performance since start of shift or to keep running totals. For example, you might want to track actual performance statistics against projected or forecasted values. On a less frequent basis, you can create complex, one time only reports with a minimum of effort.



In addition to keeping running totals, a key benefit of a cumulative report is the use of the trend information to help with forecasting. The trend line is based on information collected for the previous day or the same day last week, and is present whenever you open the report. Tracking the current day's statistics against the selected trend, might alert you to upcoming problems. You may have to change staffing levels to accommodate anticipated volume fluctuations predicted by the trend line.

As an online report, the user interface provides viewing options such as showing or hiding levels of detail, and the ability to change views. Lastly, you can print or export the online report.

## 7.4 About activity reports

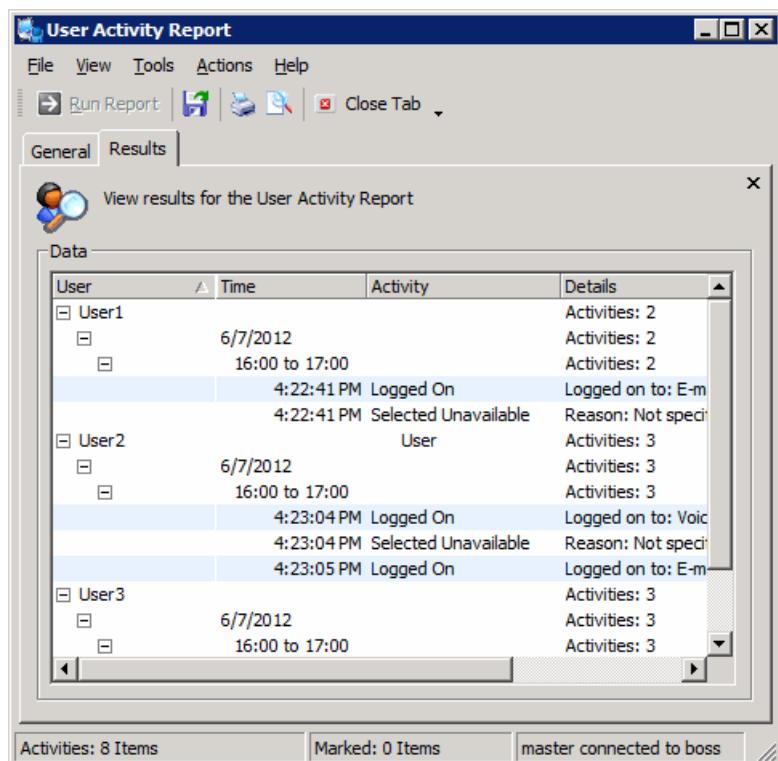
There are three types of activity reports that you can generate:

- **User Activity Report** – see [Section 7.10, “Generating a User Activity Report”, on page 128](#).
- **Source Activity Report** – see [Section 7.11, “Generating a Source Activity Report”, on page 129](#).
- **Scheduled Callback List** – see [Section 13.4, “Generating a Scheduled Callback List”, on page 243](#).

User and Source Activity Reports provide historical, step-by-step, state and activity data during a specified time interval for a specified date range. Note that the statistics are available only after the activity is complete, for example, after the current state has changed. In addition, the system requires a 15-minute delay so the statistics can be written to the OpenScape Contact Center database. For a description of the statistics available, refer to the *Reporting Reference Guide*.

A Scheduled Callback List provides a list of the callbacks scheduled for the contact center.

The following is an example of a User Activity Report for multiple users.



The screenshot shows a Windows application window titled "User Activity Report". The window has a menu bar with "File", "View", "Tools", "Actions", and "Help". Below the menu is a toolbar with icons for "Run Report", "Print", "Save", and "Close Tab". There are two tabs at the top: "General" and "Results", with "General" selected. A sub-header "View results for the User Activity Report" is displayed above a data grid. The data grid is titled "Data" and has columns: "User", "Time", "Activity", and "Details". The data is organized by user. For User1, there are two entries: one for 6/7/2012 from 16:00 to 17:00, and another for 4:22:41 PM. The "Activity" column shows "Logged On" and "Selected Unavailable". The "Details" column shows "Activities: 2" for both entries. For User2, there are two entries: one for 6/7/2012 from 16:00 to 17:00, and another for 4:23:04 PM. The "Activity" column shows "Logged On" and "Selected Unavailable". The "Details" column shows "Activities: 3" for both entries. For User3, there is one entry for 6/7/2012 from 16:00 to 17:00, with "Logged On" as the activity and "Activities: 3" in the details. At the bottom of the window, status bars show "Activities: 8 Items", "Marked: 0 Items", and "master connected to boss".

## 7.5 Monitoring permissions and reporting

If you are a supervisor or manager, you may have been assigned a number of users, groups, and queues that you have permission to monitor. As a result, you can report only on those resources that you have permission to monitor. For information on the resources that you can monitor, contact your administrator.

The reporting level also affects what you can monitor.

## Reporting

### Reporting level

## 7.6 Reporting level

The reporting level is a licensed feature that restricts the amount of information that can be displayed for performance statistics in certain types of reports.

A site can have one of three reporting levels:

- **Full** – User historical and user cumulative reports can include detailed and summary statistics for each user. Events in source activity reports can identify specific users. User activity reports can be generated.
- **Department** – User historical and user cumulative reports can display statistics at the department level or site level only. Detailed and summary statistics for users are not available. Events in source activity reports pertaining to individual users identify only the user's department, not the individual user. User activity reports cannot be generated.
- **Site** – User historical and user cumulative reports can display statistics at the site level only. Detailed and summary statistics at the user and department level are not available. Events in source activity reports pertaining to individual users identify only the user's site and not the individual user. User activity reports cannot be generated.

For more information on the reporting level at your site, contact your service representative.

## 7.7 Configuring a report

When configuring real-time, cumulative, and historical reports, you create a report definition that defines the properties of the report. Some properties are common to all report types, for example, all reports have a layout property that dictates the columns displayed in the report and their order. Some properties are specific to certain report types. For example, real-time reports let you set alarms to draw your attention to certain values, and historical reports can be scheduled to run on a regular basis.

---

**NOTE:** To create or change a report definition, you must have Full or Modify access, respectively, for the associated Manager permission.

---

Before modifying an existing report, consider its ownership. If you have permission to monitor other users and have assigned users ownership of a report you want to modify, you may want to consult those users before you modify the report definition.

---

**NOTE:** Since activity reports are intended to be used as simple, case-by-case queries, there is no saved report definition for an activity report.

---

## Overview

The following is an overview of the steps required to configure all the properties in a report definition:

1. Configure the general report properties – see [Section 7.7.1, "Configuring the general report properties", on page 89](#).
2. Select the resources that you want to report on – see [Section 7.7.2, "Selecting the content for a report", on page 94](#).
3. Specify the columns you want to appear in the report – see [Section 7.7.3, "Specifying the columns in a report", on page 102](#).
4. For real-time and cumulative reports, set the thresholds and alarms for particular columns – see [Section 7.7.4, "Setting thresholds and alarms in a report", on page 103](#).
5. Optionally, specify a bar chart for the report – see [Section 7.7.5, "Specifying a bar chart in a report", on page 106](#).
6. For historical reports, specify when to run the report and submit the report to the Scheduler – see [Section 7.7.6, "Scheduling a historical report", on page 107](#).
7. Specify the output options for the report – see [Section 7.7.7, "Specifying the output options for a report", on page 110](#).

## 7.7.1 Configuring the general report properties

When configuring a report, the first step is to configure the general report properties. The options you can select depend on the type of report you want to configure.

#### To configure the general report properties:

1. On the **File** menu, point to **New**, then **Report Center**, and then click the type of report you want to create.

---

**NOTE:** To make a copy of a predefined report, in the **Report Center**, under **Definitions**, click the type of report you want to copy, then, in the right pane, right-click the report definition you want to copy and click **Create Copy**.

---

2. Under **Report**, do the following:
  - In the **Name** box, type a unique name for the report.
  - In the **Description** box, type a description for the report. The description should include information about what the report contains, and what resources the report is monitoring.
3. In the **Owner** list, select the user who will be able to use this report when logged on to the Manager application. By default, your user name is selected. The list will contain all users that you have permission to monitor. You can assign a user who does not have permission to create reports as the owner of the report.
4. Under **Attributes**, do the following:
  - In the **Type** list, select the type of report you want to create: **Real-time**, **Cumulative**, or **Historical**. For some resources, only certain report types are available.
  - In the **Include** area, select the **Table** check box to include tabular information in the report, and/or select the **Chart** check box to include a bar chart in the report. A report is displayed in table format by default where the rows list the resources and the columns contain the statistics for those resources. If you clear the **Table** check box, the **Chart** check box is selected by default, but you can chart a single statistic only.
  - For a cumulative report, specify the range. For details, see [Section 7.7.1.1, "Specifying the range for a cumulative report", on page 91](#).
  - For a historical report, specify the range. For details, see [Section 7.7.1.2, "Specifying the range for a historical report", on page 91](#).
5. If you are finished working with this report definition, click **OK**.

### 7.7.1.1 Specifying the range for a cumulative report

When configuring a cumulative report, you must specify the range of the report.

#### To specify the range for a cumulative report:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Under **Attributes**, in the **Range** list, select the range to be covered by the report in the current 24-hour period:
  - To show statistics accumulated since the start of the current shift, select **Since shift start**.
  - To show the most recent statistics, accumulated over a specified number of hours, select **Most recent**, and then in the **Time** box, type or select the amount of time (in hours and minutes) to be covered by the report.
  - To show statistics accumulated since some specified time of the day, select **Since**, and then in the **Time** box, type or select the starting time for the report.
  - In the **Interval** list, select the update interval for the report: **15 Minute** or **Hourly**.
3. If you are finished working with this report definition, click **OK**.

### 7.7.1.2 Specifying the range for a historical report

When configuring a historical report, you must specify the range of the report.

---

**NOTE:** The Start date, End date, Start time, and End time are determined based on the time and time zone settings configured on the server machine.

---

#### To specify the range for a historical report:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Under **Attributes**, to specify a range that crosses over the midnight boundary, select the **Report over midnight** check box. This ensures that the data in the generated report includes intervals that cross over the midnight boundary.
3. In the **Range** list, select the range of the report. Your choices are:
  - **Yesterday** – Run a report on yesterday's statistics. The report can be broken down into 15-minute, hourly, or daily intervals.
  - **This Week** – Run a report on the accumulated statistics to date for this week. The **Start date** is based on the specified first day of the week setting. The report can be broken down into 15-minute, hourly, or daily intervals.
  - **Last Week** – Run a report on last week's statistics. The **Start date** is based on the specified first day of the week setting. The report can be broken down into 15-minute, hourly, daily, or weekly intervals.
  - **This Month** – Run a report on the accumulated statistics to date for this month. The **Start date** is the first day of the month. The report can be broken down into 15-minute, hourly, daily, or weekly intervals.
  - **Last Month** – Run a report on last month's statistics. The **Start date** is the first day of the month. The report can be broken down into 15-minute, hourly, daily, weekly, or monthly intervals.
  - **Custom** – Run a report on a custom range in which you specify the start and end dates. Reports covering a custom range can be broken down into 15-minute, hourly, daily, weekly, or monthly intervals, depending on the start date and end date that you specify.

---

**NOTE:** If you selected the **Report over midnight** check box in step 2, the ranges appear as **<Range>, Including Previous Day**. In each case, the **Start date** provided by the system will be one day before the start of the selected range. For example, if you select **This Month, Including Previous Day**, the **Start date** will be the last day of the previous month. Also, when the **Report over midnight** check box is selected, the report can only be broken down into 15-minute and hourly intervals.

---

4. If you selected **Custom**, in the **Start date** and **End date** boxes, type the start and end dates of the range. When the **Report over midnight** check box is selected, the start date cannot be the same as the end date.
5. In the **Interval** list, select the interval for which you want subtotals displayed within the range of the report. Refer to the descriptions in step 3, above.

---

**NOTE:** If you select **<None>** for the interval, the report will be generated using the 15-minute statistics. This can cause the report to fail if the number of database records used to generate the report exceeds the maximum.

---

6. In the **Start time** and **End time** boxes, specify only that part of the day that you want the report to cover. This is useful if your contact center is active only during part of the day or if you want to target particular shifts. The values are entered using a 24-hour clock. When the **Report over midnight** check box is selected, the **Start time** must be equal to or later than the **End time**. Some examples are as follows:
  - 09:00 to 17:00 – The report will cover between 9:00 A.M. and 5:00 P.M. on the same day.
  - 08:00 to 08:00 – The report will cover the 24-hour period.
  - 23:00 to 07:00 – The report will cover between 11:00 P.M. on one day to 07:00 A.M. on the next day. This configuration is only possible when the the **Report over midnight** check box is selected.

---

**NOTE:** To specify 23:59 as the **End time**, select the **End of day** check box. When the **Report over midnight** check box is selected, the **End of day** check box is unavailable.

---

## Reporting

### Configuring a report

7. For a user, routing state reason, Wrap-up reason, or Post-processing reason report, if multiple locations are configured, in the **Use time zone of** list, select the time zone option that you want to use to generate the contents of the report. Your choices are **Local site** or **User location**.

---

**NOTE:** If you select **User location**, you cannot report by queue or by aggregate in a Wrap-up reason historical report, as described in step 5 of [Section 7.7.2.3, “Selecting the resources for a historical report”, on page 98](#).

---

8. If you are finished working with this report definition, click **OK**.

## 7.7.2 Selecting the content for a report

A report definition must specify the resources that you want to report on. The resources that you can select depend on the type of report you are configuring and can include users, groups, queues, destinations, and so on. For details, see the following topics:

- [Section 7.7.2.1, “Selecting the resources for a real-time report”, on page 95](#)
- [Section 7.7.2.2, “Selecting the resources for a cumulative report”](#)
- [Section 7.7.2.3, “Selecting the resources for a historical report”, on page 98](#)

Each report can contain up to 100 resources; however, selecting a large number of resources will decrease system performance.

---

**NOTE:** You can report only on the resources for which you have been assigned monitoring permission (see [Section 7.5, “Monitoring permissions and reporting”, on page 87](#)).

---

### 7.7.2.1 Selecting the resources for a real-time report

You can select different resources depending on the type of real-time report you are configuring.

**To select the resources for a real-time report:**

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Content** tab. The **Content** tab will display a list of resources, depending on the type of report you are defining. The **Content** tab will list only the resources that you have permission to monitor.
3. For a queue real-time report, use the **Report by** box to specify the level at which the resources can be selected:
  - **Queues** – The report will contain the queues you select in the list.
  - **Aggregates** – The report will contain the aggregates you select in the list.
4. For a user real-time report, use the **Select By** box to specify the level at which the resources can be selected:
  - **User** – The report will contain the users selected in the list.
  - **Group** – The report will contain all users who are members of the groups you select and that you have permission to monitor.
5. In the list of resources, select the check box for each resource that you want to include in the report.

---

**NOTE:** When you are editing a user report where both the **Report by** and **Select by** options are **User**, the users in the list who are associated with a user template are read-only. If you want to remove one of those users from the report, you must either break the user's association with the user template, or remove the report from the user template and update all users (in which case, all users associated with the user template will be removed from the report).

---

6. For a user real-time report, under **Exclude Users**, select the **Exclude logged off users** check box to exclude any users that are logged off the system from the report.
7. For a contact real-time report, under **Contact Options**, select the **Include processing before queued contact** check box if you want the contacts that have just arrived in the contact center and are still being processed to be included in the report. If this option is not selected, the contacts will not appear in the report until they have been enqueued.
8. If you are finished working with this report definition, click **OK**.

#### 7.7.2.2 Selecting the resources for a cumulative report

You can select different resources depending on the type of cumulative report you are configuring.

##### To select the resources for a cumulative report:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Content** tab. The **Content** tab will display a list of resources depending on the type of report you are defining. The list will contain only the resources that you have permission to monitor.
3. For a queue or callback cumulative report, use the **Report by** list to select the level at which the statistics are reported:
  - **Queue** – The report will display statistics at the queue level.
  - **Aggregate** – The report will display statistics at the aggregate level.
4. For a callback cumulative report, use the **Select by** list to select the level at which the resources can be selected:
  - **Queue/Aggregate** – The report will contain the queues or aggregates (depending on your selection in step 3, above) you select.
  - **Origin** – The report will contain the queues or aggregates (depending on your selection in step 3, above) that contain callbacks that were created in the ways you select.
5. For a user or routing state reason cumulative report, use the **Report by** box to select the level of detail in the report:
  - **User** – The report will display full user identification information and statistics.
  - **Department** – The report will display statistics only at the department level. User identification and detailed user statistics are suppressed.
6. For a Wrap-up reason cumulative report, use the **Report by** box to select the level of detail in the report:
  - **User** – The report will display full user identification information and statistics.
  - **Department** – The report will display statistics only at the department level. User identification and detailed user statistics are suppressed.

- **Queue** – The report will display statistics only at the queue level. User and department identification and detailed department and user statistics are suppressed.
- **Aggregate** – The report will display statistics only at the site level. User and department identification and detailed department and user statistics are suppressed.

---

**NOTE:** The **Report by** options described in steps 5 and 6, above, are available only within the constraints of the reporting level for your site (see [Section 7.6, "Reporting level", on page 88](#)). For example, if your site uses the Department reporting level, you cannot generate reports at the User level. The **Report by** options are also affected by your monitoring permissions. For example, if you have permission to monitor only two users, you can generate user reports with statistics on those two users only.

---

7. If you selected **User** in step 5 or step 6, use the **Select by** list to choose the level at which the users can be selected:
  - **User** – The report will display statistics for the users you select in the list.
  - **Group** – The report will display statistics for all users who are members of the groups you select and that you have permission to monitor.
  - **Department** – The report will display statistics for all users who are members of the departments you select and that you have permission to monitor.
8. In the list of resources, select the check box for each resource that you want to include in the report.

---

**NOTE:** When you are editing a user report where both the **Report by** and **Select by** options are **User**, the users in the list who are associated with a user template are read-only. If you want to remove one of those users from the report, you must either break the user's association with the user template, or remove the report from the user template and update all users (in which case, all users associated with the user template will be removed from the report).

---

9. If you are finished working with this report definition, click **OK**.

#### 7.7.2.3 Selecting the resources for a historical report

You can select different resources depending on the type of historical report you are configuring.

##### To select the resources for a historical report:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Content** tab. The resources that can be reported on (for example, users, queues, or destinations) are displayed. The **Content** tab will display only the resources that you have permission to monitor.
3. For a queue historical report, use the **Report by** list to select the level at which the queues can be selected:
  - **Queue** – The report will display statistics for the queues you select in the list.
  - **Queue by User** – The report will display statistics for the queues you select in the list, with details for the users within each queue.
  - **Aggregate** – The report will display statistics for the aggregates you select in the list.
4. For a user or routing state reason historical report, use the **Report by** box to select the level of detail in the report:
  - **User** – The report will display full user identification information and statistics.
  - **User by Queue** (not available for a routing state reason report)
    - The report will display full user identification information and statistics, with details for each queue from which the contact was assigned.
  - **Department** – The report will display statistics only at the department and site level. User identification and detailed user statistics are suppressed.

5. For a Wrap-up reason historical report, use the **Report by** box to select the level of detail in the report:
  - **User** – The report will display full user identification information and statistics.
  - **Department** – The report will display statistics only at the department level. User identification and detailed user statistics are suppressed.
  - **Queue** – The report display statistics only at the queue level. User and department identification and detailed department and user statistics are suppressed.
  - **Aggregate** – The report will display statistics only at the aggregate level. User and department identification and detailed user and department statistics are suppressed.

---

**NOTE:** The **Report by** options described in step 4 or step 5, above, are available only within the constraints of the reporting level for your site (see [Section 7.6, "Reporting level", on page 88](#)). For example, if your site uses the Department reporting level, you cannot generate reports at the user level. The **Report by** options are also affected by your monitoring permissions. For example, if you have permission to monitor only two users, you can generate user reports with statistics on those two users only.

---

6. For a callback historical report, use the **Report by** box to select the level at which the callbacks statistics are reported:
  - **Queue** – The report will display callback statistics for the queues you select in the list.
  - **Aggregate** – The report will display callback statistics for the aggregates you select in the list.
  - **Disposition** – The report will display statistics for all callbacks that have the dispositions you select in the list.
7. If you selected **User** or **User by Queue** in step 4 or step 5, use the **Select By** list to choose the level at which the users can be selected:
  - **User** – The report will display statistics for the users you select in the list.
  - **Group** – The report will display statistics for all users who are members of the groups you select and that you have permission to monitor.

## Reporting

### Configuring a report

- **Department** – The report will display statistics for all users who are members of the departments you select and that you have permission to monitor.

8. If you selected **Queue** in step 6, use the **Select By** list to choose the level at which the queues can be selected:

- **Queue** – The report will display statistics for the queues you select in the list.
- **Origin** – The report will display statistics for all callbacks that originated in the ways you select in the list.

9. If you selected **Aggregate** in step 6, use the **Select By** list to choose the level at which the aggregates can be selected:

- **Aggregate** – The report will display statistics for the aggregates you select in the list.
- **Origin** – The report will display statistics for all callbacks that originated in the ways you select in the list.

10. In the resulting list of resources, select the check box for each resource that you want to include in the report.

---

**NOTE:** When you are editing a user report where both the **Report by** and **Select by** options are **User**, the users in the list who are associated with a user template are read-only. If you want to remove one of those users from the report, you must either break the user's association with the user template, or remove the report from the user template and update all users (in which case, all users associated with the user template will be removed from the report).

---

11. For a contact historical report, or if you selected **Queue by User** in step 3 or **User by Queue** in step 4, select the **Include contact record detail in this report** check box to have the report include state and activity data. This check box is available only if the selected interval is daily, weekly, or monthly (see [Section 7.7.1.2, "Specifying the range for a historical report", on page 91](#)).

---

**NOTE:** If you select this check box, and the number of database records used to generate the report exceeds 10,000, the report will fail. The failed report will appear in the **Failed** folder with a message indicating that the number of records used to generate the report exceeded the maximum. To generate the report successfully, you must either select fewer resources to report on or reduce the range of the report to cover a shorter time period.

---

12. If you are finished working with this report definition, click **OK**.

### 7.7.3 Specifying the columns in a report

You can choose the statistics you want to appear as columns in your reports, as well as the order in which they appear. The statistics that are available for selection depend on the resources on which you are reporting (see [Section 7.7.2, "Selecting the content for a report", on page 94](#)).

#### To specify the columns in a report:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Columns** tab. The tab lists all the statistics you can display in the report.
3. Under **Columns**, do the following:
  - a) In the **Report on** list, select the media you want to report on.
  - b) Select the check box for each column that you want to appear in the report. For descriptions of the columns you can select, see the *Reporting Reference Guide*.

---

**NOTE:** The column that identifies the resource being reported on is selected by default and cannot be cleared. In the case of user reports, either the Name or User ID check box must be selected. The application will not allow you to clear both check boxes.

---

- c) The top to bottom order of the statistics in the list reflects the left to right order in which the columns appear in the report. To change the order of the columns, click anywhere in the row (not in the check box) to select the row, and then click the up or down arrow key to the right of the list to move the row up or down, respectively.
4. Under **Sort**, do the following:
  - In the **Sort By** list, select the column on which to sort the data in the report.
  - In the **Sort Order** list, select the sort order (**Ascending** or **Descending**) for the report.
5. If you are finished working with this report definition, click **OK**.

## 7.7.4 Setting thresholds and alarms in a report

Real-time and cumulative reports have an alarm mechanism that can alert you to key values in a report. You can set a threshold on a particular statistic in a report and, when the threshold is exceeded, a visible or audible alarm draws your attention to that statistic value. Alarm actions include logging a message to the System Messages window, color highlighting in the appropriate column of the report table, and playing a .wav file.

---

**NOTE:** The color highlighting alarm action cannot be displayed in a bar chart.

---

You can set thresholds only on threshold-eligible statistics. To determine if you can set a threshold on a statistic, see the description of the statistic in the *Reporting Reference Guide*.

---

**NOTE:** To set thresholds in a report, you must have the **Set view and report thresholds** Manager permission.

---

You can set up to three different conditions for a statistic for low, medium, and high thresholds. For example, you could set the following conditions on a Contacts - Queued statistic:

- Highlight the value in blue when the number of contacts waiting is greater than 5.
- Highlight the value in yellow when the number of contacts waiting is greater than 10.
- Highlight the value in red when the number of contacts waiting is greater than 15.

---

**NOTE:** Before setting thresholds and alarms, you must first specify the columns to be displayed in the report (see [Section 7.7.3, "Specifying the columns in a report", on page 102](#)).

---

### To set a threshold and alarm in a report:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Thresholds** tab.

3. Under **Defined Thresholds**, the application lists all existing threshold definitions for this report.
  - To create a new threshold, click **Add**.
  - To edit an existing threshold, select the threshold in the list and click **Edit**.
4. In the **Variable Threshold** dialog box, in the **Statistics** list, select the name of the statistic for which you want to set a threshold. The list contains only threshold-eligible statistics.
5. If you selected a state statistic, in the **State** list, select the state with which you want to associate the threshold.
6. In the **Contact Type** list, select the contact type with which you want to associate the threshold.
7. Select the **Active** check box to activate the threshold on this statistic.
8. Depending on the type of resource you are reporting on (see [Section 7.7.2, “Selecting the content for a report”, on page 94](#)), select the check box for each resource for which the threshold will be displayed. For example, if you are configuring a user real-time report, under **Users**, select the check box for each user for which you want the threshold to be displayed.
9. Click the **Thresholds** tab.
10. Under **Activity**, in the **Range** list, select the threshold range for which you want to set the alarms: **Low**, **Medium**, or **High**.
11. If you selected the Medium or High threshold range, select the **Active** check box to activate the alarm on the range. You cannot clear the Active check box on the Low range – it is selected by default.
12. In the **Threshold** box, type or select the threshold value.

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13. In the **Action** area, select the check box for each alarm you want to set for the threshold range:

- If you want to log a system message each time the threshold is exceeded, select the **Log Alarm to System Messages window** check box.
- If you want to highlight the text in a different color each time the threshold is exceeded, select the **Change color** check box and select a color from the list.
- If you want to play a sound file each time the threshold is exceeded, select the **Play a sound file** check box, type the name of the .wav file stored on the main server machine. If you are on the main server machine, you can browse to select the .wav file.

---

**NOTE:** If you are connected to a production database, you can click  to play the .wav file. You cannot play .wav files when you are connected to a design database.

---

14. Repeat steps 10 to 13 for each threshold range you want to configure.

15. Under **Summary**, view the threshold ranges and alarms you have set.

16. Click **OK** to close the Variable Threshold dialog box. The threshold is displayed in the **Defined Thresholds** list.

17. If you are finished working with this report definition, click **OK**.

## 7.7.5 Specifying a bar chart in a report

All types of reports can contain a bar chart for a single statistic. Only some of the statistics in a report can be charted. To determine if a statistic can be charted, see the description of the statistic in the *Reporting Reference Guide*.

---

**NOTE:** The color highlighting alarm action for a statistic cannot be displayed in a bar chart. For details, see [Section 7.7.4, "Setting thresholds and alarms in a report", on page 103](#).

---

**NOTE:** Before setting the charting options, you must first specify the columns to be displayed in the report (see [Section 7.7.3, "Specifying the columns in a report", on page 102](#)).

---

### To specify a bar chart in a report:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Ensure that charting is enabled: on the **General** tab, under **Attributes**, select the **Chart** check box.
3. Click the **Chart** tab.
4. Under **Settings**, in the **Statistic** list, select the name of the statistic that you want to chart. The list contains only the columns that can be charted.
5. In the **Bar Color** list, select the color of the bars in the chart. You can select only one color for all the bars.
6. In the **Style** area, select the style of the bars: **2D** or **3D**.
7. For cumulative reports only, you can display a trend line on the chart. Select the **Show trend** check box and then specify the properties of the trend line, as follows:
  - In the **Trend** box, choose **Yesterday** to display a trend line based on yesterday's statistics or choose **Same Day Last Week** to display a trend line based on statistics from seven days ago.
  - In the **Line style** list, select **Straight** or **Smooth**.
  - In the **Line color** list, select the color of the trend line.
  - Select the **Data points** check box if you want the trend line to show key data points.

8. Under **Preview**, view the choices you have made for your bar chart.
9. If you are finished working with this report definition, click **OK**.

## 7.7.6 Scheduling a historical report

You must submit the reports that you want to execute to the Scheduler. The Scheduler is the component responsible for scheduling reports, queuing reports to execute, and maintaining the completed reports.

---

**NOTE:** To schedule a historical report, you must have the **Schedule and view historical reports** Manager permission.

---

If a scheduled report executes while you are not logged on to the Manager application, the next time you log on you will be prompted to transfer the completed report to the local machine. At that time, the report will be output as specified in the report definition. The system keeps completed reports for up to seven days.

---

**NOTE:** If you encounter issues when trying to view or print a historical report, export a historical report to a file, or send a historical report by e-mail, it may be due to a network issue. For assistance, contact your network administrator.

---

You can schedule a historical report to:

- Run immediately – see [Section 7.7.6.1, "Scheduling a report to run immediately", on page 108](#)
- Run at a specific date and time – see [Section 7.7.6.2, "Scheduling a report to run once at a specific date and time", on page 108](#)
- Run on a regular basis – see [Section 7.7.6.3, "Scheduling a report to run on a regular basis", on page 109](#)

---

**NOTE:** If you modify a scheduled historical report, in addition to saving the report definition, you must also resubmit the report to the Scheduler.

---

### 7.7.6.1 Scheduling a report to run immediately

When you configure a historical report, you can schedule the report to run immediately.

#### To run a report immediately:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Schedule** tab.
3. In the **Run the report** list, select **Now**.
4. Click **Submit to Scheduler**. The report will run with the destination and format specified on the Output tab.

### 7.7.6.2 Scheduling a report to run once at a specific date and time

When you configure a historical report, you can schedule the report to run at a specific date and time.

#### To schedule a report to run once:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Schedule** tab.
3. In the **Run the report** list, select **One Time**. The tab is updated to allow you to specify when your report is to run.
4. In the **Date** list, select the date when the report is to run.
5. In the **Time** list, specify the time when you want the report to run. The format is based on a 24-hour clock, for example, 4:00 P.M. is entered as 16:00.
6. Click **Submit to Scheduler**. The report will run with the destination and format specified on the Output tab.

#### 7.7.6.3 Scheduling a report to run on a regular basis

When you configure a historical report, you can schedule the report to run on a regular basis.

##### To schedule a report to run on a regular basis:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Schedule** tab.
3. In the **Run the report** list, select **More Than once**. The tab is updated to allow you to specify when your report is to run.
4. Use one of the following methods to schedule how often the report is to run:
  - Click **Daily** and then select the check box beside each day of the week when you want the report to run. In the **Time** box, type or select the time of day when the report is to run.
  - Click **Weekly** and then, from the **Day** list, select the day of the week when you want the report to run. In the **Time** box, type or select the time of day when the report is to run.
  - Click **Monthly** and then, from the **Day** list, select one of the following: **Last Day** to generate the report on the last day of the month, or **Specific Day** and then choose a date in the month from the box that appears. In the **Time** box, type or select the time of day when the report is to run.

---

**NOTE:** The format of the **Time** box is based on a 24-hour clock, for example, 4:00 P.M. is entered as 16:00.

---

5. Use one of the following methods to specify the duration of this report schedule:
  - To run the report indefinitely, click the **Forever**.
  - To apply the schedule for a fixed length of time, click **Custom** and then use the **Start** and **End** lists to specify the start and end dates.
6. Click **Submit to Scheduler**. The report will run with the destination and format specified on the Output tab.

## 7.7.7 Specifying the output options for a report

Real-time and cumulative reports are normally designated for online viewing, whereas historical reports can be viewed online, printed, exported to a file, or sent as an attachment in an e-mail message. For more information, see the following topics:

- [Section 7.7.7.1, "Specifying the output options for a real-time or cumulative report", on page 110](#)
- [Section 7.7.7.2, "Specifying the output options for a historical report", on page 112](#)

### 7.7.7.1 Specifying the output options for a real-time or cumulative report

Real-time and cumulative reports can be designated for online viewing only because they contain information that is updated in real time. However, if you need a hard or soft copy of a real-time or cumulative report, you can print a copy or save it to a file while viewing it online. In these cases, you use the Output tab to specify the printer that is used when you print the report from the screen. You can also specify the format and file name to be used when you save a copy of the report to the hard drive.

The default output settings for reports are specified in the user reporting options. For details, see [Section 7.12.1, "Configuring the general user reporting options", on page 131](#)). However, you can override the default settings when you configure the output options for the report.

#### To specify the output options for a real-time or cumulative report:

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Output** tab.
3. Under **Default Output Settings**, the **View report** option is selected by default and cannot be changed.
4. Under **Output Mode Settings**, in the **Output mode** list, select the output mode for which you want to change the default settings.

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5. If you selected **Print report** in step 4, do the following:
  - In the **Printer name** list, select the printer where you want the report to be printed.
  - To specify the formatting options, such as page orientation, headers, and footers, click **Advanced**.
6. If you selected **Export report** in step 4, do the following:
  - In the **Format** list, select the file format of the report. Your choices are Modern Microsoft Excel Workbook (.xlsx), Web Page (.htm), CSV (Comma Delimited) (.csv), or Portable Document Format (.pdf), Old Microsoft Excel Workbook (.xls).
  - In the **File Name** box, specify the location and name of the file to which you want to export the report. You must include the full path to the exported file, for example, C:\filename.
  - To specify the formatting options, such as page orientation, headers, and footers, click **Advanced**.
7. If you are finished working with this report definition, click **OK**.

#### 7.7.7.2 Specifying the output options for a historical report

When you configure a historical report, you can designate the report to be viewed online, printed, exported to a file, or sent to one or more recipients by e-mail. Regardless of the output mode, completed historical reports are sent to a specified report folder.

---

**NOTE:** The option to send a historical report by e-mail is available only if the e-mail reports option is enabled, and you have the **E-mail historical reports** Manager permission. For details on how to enable the e-mail reports option, see [Section 7.13.5, “Configuring the e-mail reports option”, on page 144](#).

---

The default output settings for reports are specified in the user reporting options. For details, see [Section 7.12.1, “Configuring the general user reporting options”, on page 131](#). However, you can override the default settings when you configure the output options for the report.

**To specify the output options for a historical report:**

1. In the **Report Center**, under **Definitions**, select the report type, then, in the right pane, double-click the report definition that you want to configure.
2. Click the **Output** tab.
3. Under **Default Output Settings**, in the **Output folder** list, select the report folder where you want to send the completed report. You can choose the default Report Inbox or a custom report folder.
4. In the **Output mode** list, select the default output mode for the report:
  - **View report** – The report is available for online viewing only.
  - **Print report** – The report is sent to a printer.
  - **Export report** – The report is exported to a file.
  - **E-mail report** – The report is attached to an e-mail message and sent to one or more recipients.
5. Under **Output Mode Settings**, in the **Output mode** list, select the output mode for which you want to change the default settings.
6. If you selected **Print report** in step 5, do the following:
  - In the **Printer name** list, select the printer where you want the report to be printed.
  - To specify the formatting options, such as page orientation, headers, and footers, click **Advanced**.
7. If you selected **Export report** in step 5, do the following:
  - In the **Format** list, select the file format of the report. Your choices are Modern Microsoft Excel Workbook (.xlsx), Web Page (.htm), CSV (Comma Delimited) (.csv), or Portable Document Format (.pdf), Old Microsoft Excel Workbook (.xls).
  - In the **File Name** box, specify the location and name of the file to which you want to export the report. You must include the full path to the exported file, for example, C:\filename.
  - To specify the formatting options, such as page orientation, headers, and footers, click **Advanced**.

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8. If you selected **E-mail report** in step 5, do the following:

- In the **From** box, the application displays the outgoing e-mail address specified in the default output settings. You cannot edit the e-mail address.
- Specify the e-mail recipients.
  - To select a recipient from an LDAP directory, click **To**, **Cc**, or **Bcc**, and select the recipient in the **Select Recipients** dialog box. To use this feature, a directory must already be configured. For details, see [Section 5.5, “Configuring a directory”](#).
  - In the **To**, **Cc**, or **Bcc** boxes, type the e-mail address of the recipient. To type an e-mail address, you must have the **Type e-mail address into Recipient field when e-mailing reports** Manager permission.
  - To specify more than one recipient in each of the **To**, **Cc**, or **Bcc** boxes, separate each recipient with a semi-colon.
- In the **Subject** box, type the subject of the e-mail message. By default, the subject is the name of the report.
- In the **Message** box, type the body of the e-mail message in plain text only. By default, the message contains the signature specified in the default output settings.
- In the **Format** list, select the format of the report that is attached to the e-mail message. Your choices are Modern Microsoft Excel Workbook (.xlsx), Web Page (.htm), CSV (Comma Delimited) (.csv), or Portable Document Format (.pdf), Old Microsoft Excel Workbook (.xls).
- In the **File name** box, specify the name of the attached file. The default file name is the name of the report with an extension that corresponds to the selected file format.
- To specify the formatting options of the report, such as page orientation, headers, and footers, click **Advanced**.

9. If you are finished working with this report definition, click **OK**.

## 7.8 An exercise in creating a simple real-time report

In [Section 7.1, "About real-time reports", on page 80](#), you saw a simple queue real-time report that displayed and categorized the current contacts waiting for a set of queues.

The following topics walk you through the process of creating and activating this report. This exercise is intended for practise purposes only.

Before you begin:

- Ensure that the system is running and your contact center is active. This is required to generate reports with live data.
- If you are a supervisor, you will be reporting on and monitoring resources such as queues and individual users. You will need permission to monitor these resources. To ensure that you have been granted these permissions, contact your administrator.

### 7.8.1 Creating a new report definition

The first step in creating a report is to specify a definition for the report, including the report type and the administrative details.

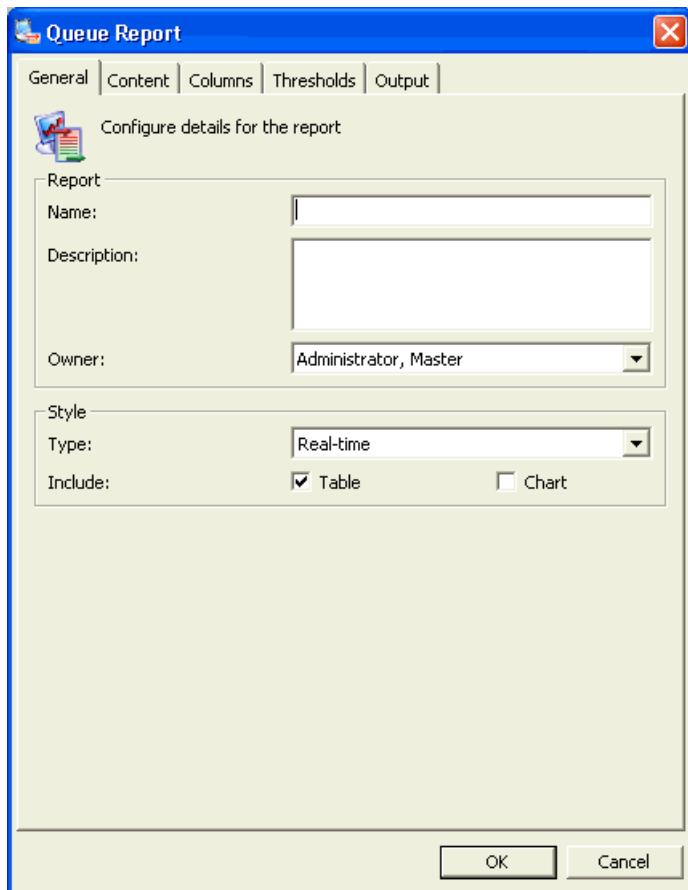
**To create a new report definition:**

1. In the **Report Center**, under **Definitions**, click **Queues**.
2. On the **File** menu, point to **New**, then **Report Center**, and then click **Queue Report**.

## Reporting

An exercise in creating a simple real-time report

3. In the **Type** list, select **Real-time**. The tabs on the **Queue Report** dialog box reflect the various properties of a real-time report.



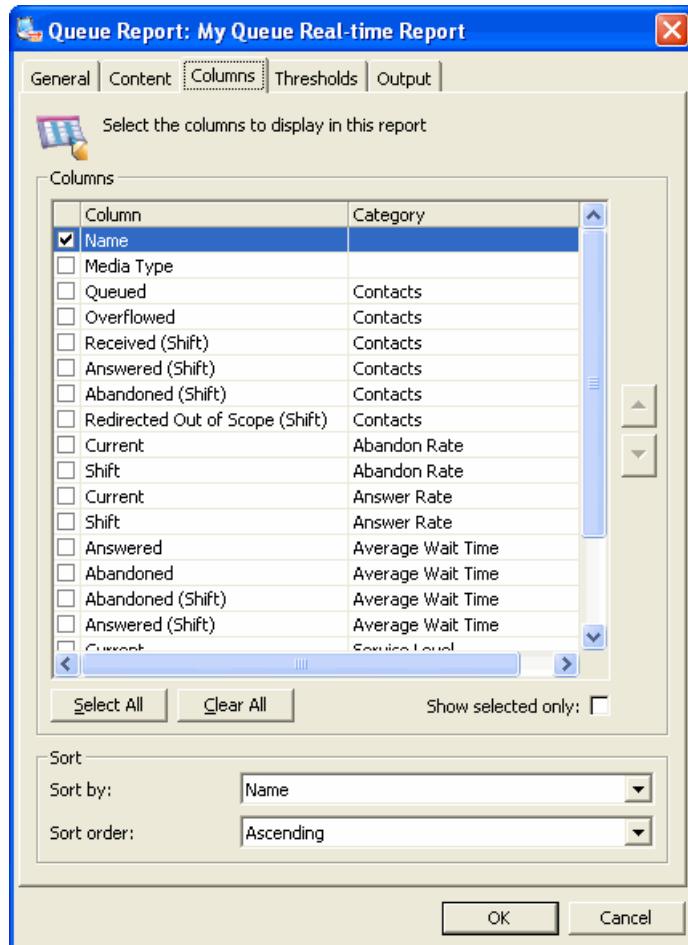
4. In the **Name** box, type **My Queue Real-Time Report**.
5. The owner can be you or any of the users you have permission to monitor. The report will be available to the owner whenever the owner logs on to the Manager application. For now, you can keep ownership of the report. Since this is the default option, no action is necessary.

### 7.8.2 Specifying the layout of the report

The most important part of the report is the set of columns displayed. This is the set of identifiers and statistics in the report and their sequence.

**To specify the layout for the report:**

1. Click the **Columns** tab.



2. Select the **Name, Contacts-Queued, Service Level-Current, Service Level-Estimated, Wait Time- Estimated Answer** check boxes. Each of the statistics associated with the check boxes corresponds to a column that can appear in the report. The top to bottom sequence of columns options corresponds to the left to right sequence of the columns in the report. Since the columns you want displayed are already in the sequence you want them displayed, specifying the layout is easy.

---

**NOTE:** The **Name** check box is automatically selected and cannot be cleared. Each report, regardless of the resource being reported on, must include an identifier for the key resource.

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### 7.8.3 Choosing the queues to report on

The queues that you can monitor and report on depend on your role. For example, if you are a contact center supervisor, the OpenScape Contact Center administrator will have given you permission to monitor one or more queues.

**To choose the queues you want to report on:**

1. Click the **Content** tab.
2. Click **Select All**.

### 7.8.4 Setting a threshold and an alarm

The report you are creating will show an alarm on the **In Queue** column. In a real-life situation in which you were using several real-time reports to monitor several sets of resources, this is the visible alarm that draws your attention to the report and to the specific column values. For more information, see [Section 7.7.4, "Setting thresholds and alarms in a report", on page 103](#).

**To set the alarm in your report:**

1. Click the **Thresholds** tab.
2. Click **Add**.
3. In the **Variable Threshold** dialog box, you can choose the column where you want to set the alarm. In the **Statistic** list, select **Contacts - In Queue**. This is the column where you want to set an alarm.

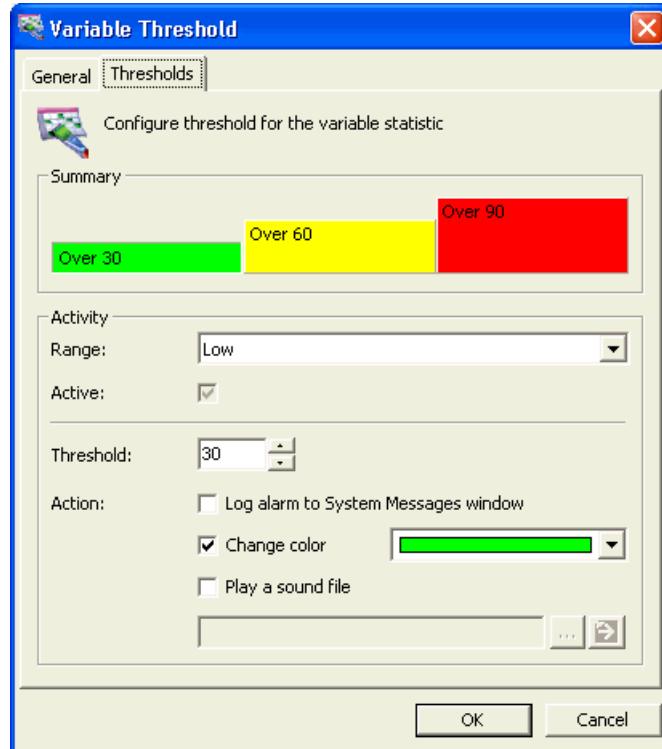
---

**NOTE:** The only items available in the **Statistic** list, are the items that you selected on the **Columns** tab that support a threshold value. For example, the **Name** column does not appear in the list, as thresholds cannot be set on the queue name.

---

4. You can also specify that the alarm should only be displayed for certain queues. The names that you see in the **Queues** area are the queues at your site that you have permission to report on. Click **Select All**. This indicates that the alarm will apply to all the queues that you selected on the **Contents** tab.

5. Click the **Thresholds** tab. This is where you provide the details of your alarm. You can configure up to three levels of alarm. For now, a single alarm level will be sufficient. You will have to disable the other two alarms.



6. In the **Range** list, select **High**.
7. Clear the **Active** check box to disable the alarm at the **High** level. The settings for the **Medium** alarm are shown.
8. Clear the **Active** check box to disable the alarm at the **Medium** level. The settings for the **Low** alarm are shown.
9. In the **Threshold** box, type or select **1** as the threshold value for your alarm. Your alarm will be displayed whenever the Contacts - Queued column value is greater than one.
10. Click the **Change color** check box and then select red as the color to display when the Contacts - Queued column value is greater than one.
11. Click **OK** to close the Variable Threshold dialog box.
12. Your report definition is now complete. Click **OK** to close the report definition.

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### 7.8.5 Activating and viewing the report

To view your report, you must first activate it. You activate the report by adding it to a view located in the **Report Views** folder.

#### To activate the report:

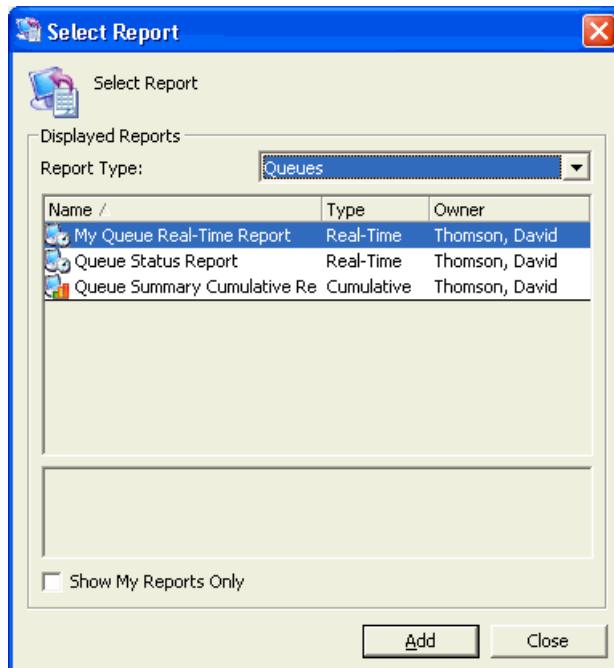
1. In the **Report Center**, under **Output**, click the **Report Views** folder. The list is updated to show the contents of the **Report Views** folder.

---

**NOTE:** Unless you are the OpenScape Contact Center administrator, your **Real-Time** folder is probably empty.

---

2. On the toolbar, click  (New). A **Report View** dialog box appears.
3. In the **Name** box, type **My Real-Time Reports**.
4. In the **Default Layout** list, select **1-Single**.
5. Click **Add**. A **Select Report** dialog box appears.



6. In the **Report Type** list, select **Queues**.
7. In the **Displayed Reports** list, click **My Queue Real-Time Report** to select it, and then click **Add**.
8. Click **Close** to close the **Select Report** dialog box.

9. Click **OK** to close the **Report View** dialog box.

10. Double-click the **My Real-Time Reports** report view. The **Real-time Viewer** opens.

You have now successfully finished working through your first report.

## 7.9 An exercise in adapting a predefined historical report

Making a copy of an existing predefined report and then modifying it is often more efficient than creating a new report. The following sections walk you through the process of adapting the **Queue Summary Report** (a predefined queue historical report) to address a slightly different reporting requirement.

Consider a real-world situation involving your queue configuration. A Borrowing queue might have a Mortgages group as its primary group and a Savings group as its overflow group. If you monitored the Borrowing queue with a real-time report on a daily basis, you might notice a daily trend towards more contacts waiting in queue. This could mean several things. There might simply be increased traffic from customers interested in mortgages as a result of a recent sales or advertising campaign. You might be inadequately staffed with regards to users who are experts in handling mortgage-related contacts. Or you might have to change the step time in your queue configuration, or adjust the associated workflow.

A queue historical report contains statistics that could help you investigate further. The following is an example of a queue historical report with the basic information you need to get started.

Name	Service Level	Abandon Rate	Received Contacts		Answered Contacts		
			All	All	Primary	Overflow	
Mutual Funds	90	10	4000	3598	2598	1000	
Oct 10	85	12	1100	935	600	335	
Nov 10	92	9	1200	1104	750	354	
Dec 10	88	11	800	704	500	204	
Jan 10	95	8	900	855	600	255	

Week-by-week reports for a period of three or four months might help you diagnose any trends. Based on the information contained in those reports, you might use other reports to examine the trends more closely. Historical reports on users might be the next step.

The predefined **Queue Summary Report** is a close approximation to the report shown above. In this exercise, you will modify the **Queue Summary Report** for use in inspecting the problems discussed above.

## Reporting

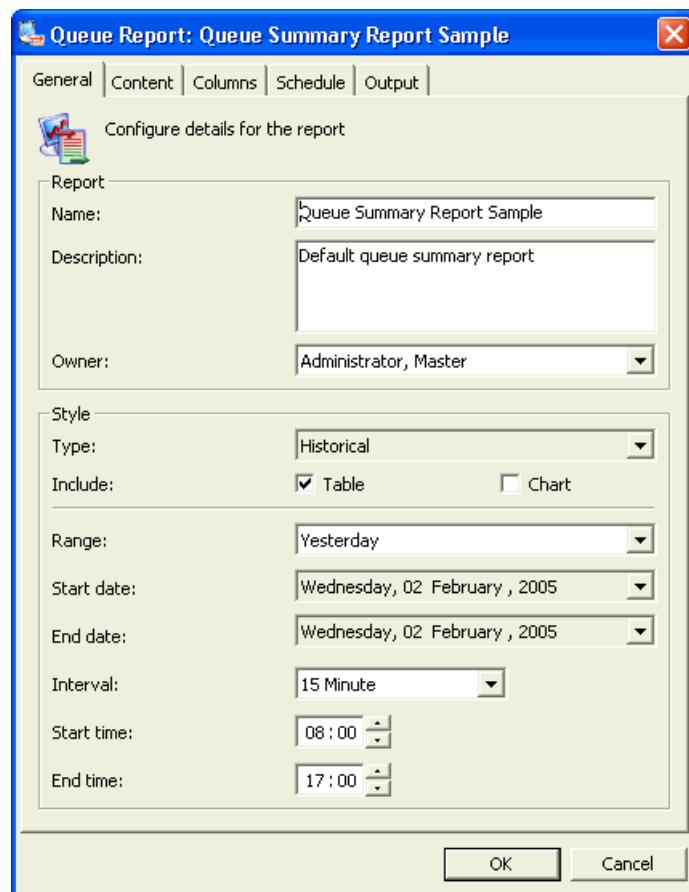
An exercise in adapting a predefined historical report

### 7.9.1 Creating a copy of the predefined report

The first step is to create a copy of the **Queue Summary Report**.

#### To create a copy:

1. In the **Report Center**, under **Definitions**, click **Queues**.
2. In the list, click **Queue Summary Report** to select that report.
3. On the **Edit** menu, click **Create Copy**.
4. In the **Queue Summary Report** dialog box, in the **Name** box, change the name to **Queue Summary Report Sample**.



## 7.9.2 Specifying the range for the report

Range and scheduling are closely related properties of a historical report. While the range dictates the length of time covered in the report, scheduling specifies when the report will be run. For example, if you are interested in daily reports (range), you might want to have the report for each day run at 10:00 A.M. the following day (schedule). You will set your new historical report to have a range of one day and have it run immediately.

### To specify the range for this report:

1. Click the **Range** list to display the range options. Leave the **Yesterday** option selected.
2. For each queue in the report, statistics will be shown broken down by the interval you choose over the range of your report. If you were interested in fine detail, you could produce a report with 15-minute intervals. In the interest of producing a simple report definition, an hourly interval will do. In the **Interval** list click **Hourly**.
3. Your report should show only those times when the contact center is open. If you want, use the **Start Time** and **End Time** boxes to choose a different daily period to be covered in the report.

## 7.9.3 Scheduling the report

You schedule daily reports to run at a specified time on the day following the day that the report is to cover. For example, if you are concerned about minimizing the load on the system, you might run the report for the previous day at a time when the contact center is not open, such as 4:00 A.M.

For this exercise, you can leave the default **Now** option selected on the **Schedule** tab. For a description of the other options, see [Section 7.7.6, "Scheduling a historical report", on page 107](#).

## 7.9.4 Specifying the layout of the report

The next task is to specify the columns that will be displayed in your report, and their sequence. Each type of historical report presents a large variety of statistics that you can use as columns in your report.

## Reporting

An exercise in adapting a predefined historical report

To bring this report in line with the report shown on [page 121](#), you will have to remove some statistics from the current definition, add others, and change the ordering.

### To specify the layout of your report:

1. Click the **Columns** tab.
2. Clear the check boxes for the following unnecessary statistics:

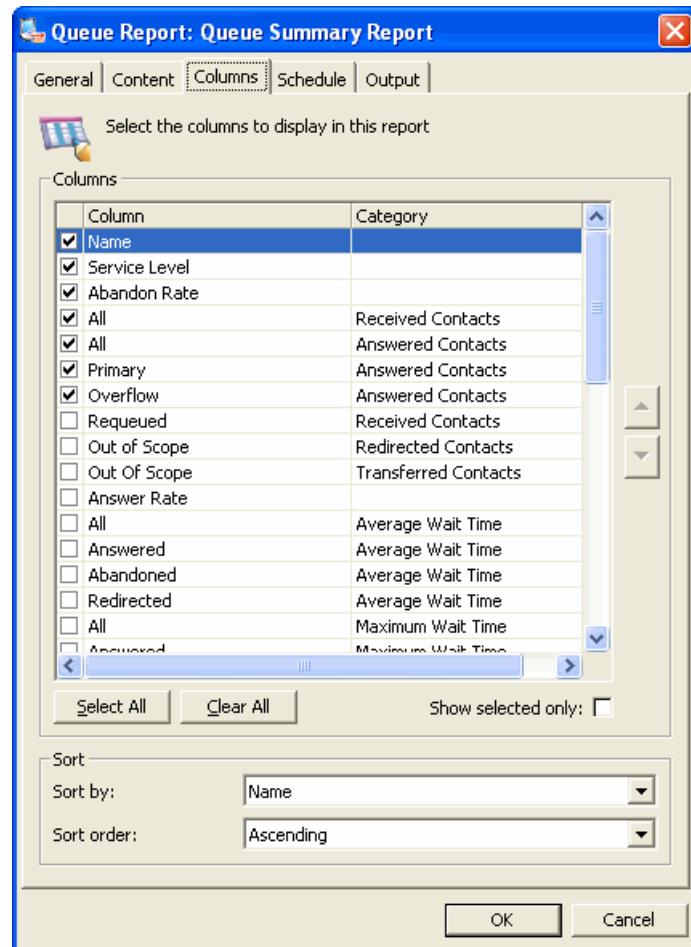
Column	Category
Redirected	Out of Scope
Abandoned	Abandoned Contacts
All	Average Wait Time

3. Select the check boxes for the following statistics you want to include:

Column	Category
Primary	Answered Contacts
Overflow	Answered Contacts

4. Select the **Service level** statistic. Do not clear the check box.
5. Click the up arrow at the right of the dialog box until the **Service level** statistic is immediately below the **Name** statistic.

6. Repeat steps 4 and 5 to move the **Abandon Rate** statistic to immediately below the new location of the **Service Level** statistic. Your **Columns** tab should now appear as follows:



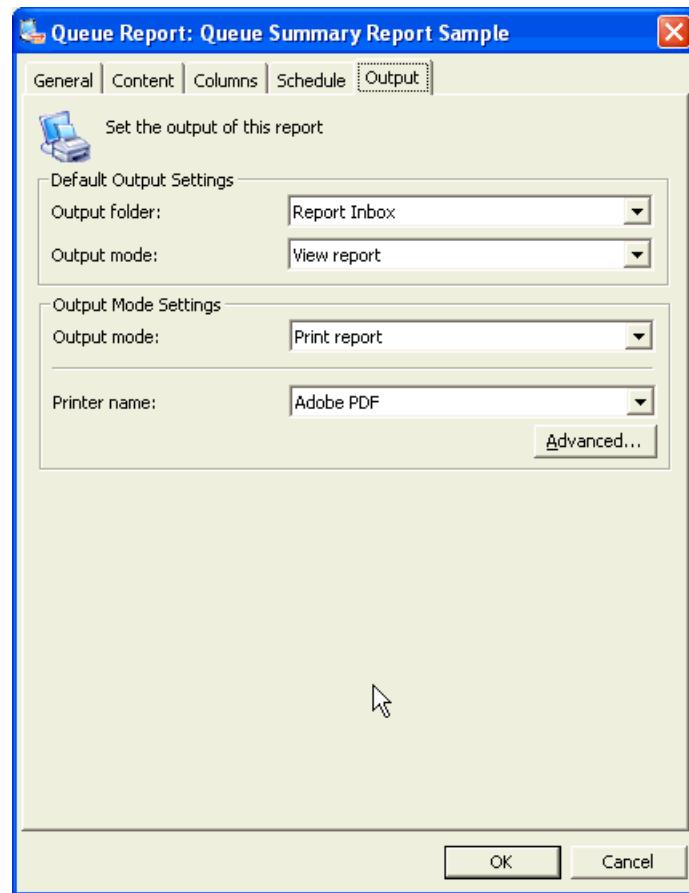
## Reporting

An exercise in adapting a predefined historical report

### 7.9.5 Specifying the output options for the report

Typically, historical reports are printed. You can, however, specify other destinations for a historical report. For details, see [Section 7.7.7.2, "Specifying the output options for a historical report", on page 112](#).

The default output mode of **View report** on the **Output** tab will work well for this exercise.



## 7.9.6 Choosing the queues to report on

The queues that you can monitor and report on depend on your role. For example, if you are a contact center supervisor, the OpenScape Contact Center administrator will have given you permission to monitor one or more queues.

### To choose the queues you want to report on:

1. Click the **Content** tab. It includes entries for all the queues that you have permission to monitor.
2. Click **Select All**.

## 7.9.7 Running the report

Your report definition is now complete. The remaining task is to run the report. Historical reports are managed by the Scheduler. For more information, see [Section 7.7.6, “Scheduling a historical report”, on page 107](#).

### To run the report:

1. Click **OK**. A dialog box appears, prompting whether you want to submit the report now.
2. Click **OK** to submit the report now. Your report may take several minutes to run. When finished, the report will be included in the **Report Inbox** folder, under **Output**. You can display the contents of that folder and double-click the report to display it.

You have now successfully finished working through your second report.

## 7.10 Generating a User Activity Report

When you generate a User Activity Report, the application displays historical, minute-by-minute, state and activity data for a user or group of users during a specified time interval for a specified date range. You can choose to report on an individual user or multiple users who were active during the time interval. If multiple locations are configured, you can choose to run the report based on the time zone of the local site or user location.

---

**NOTE:** To generate a User Activity Report, you must have the associated Manager permission.

---

---

**NOTE:** User Activity Reports are available only if your site has a reporting level of Full. For more information, see [Section 7.6, "Reporting level", on page 88](#).

---

Each row in the report provides details on an individual state change. The columns in the report are:

- **User** – The user being reported on.
- **Time** – The date and time when the activity or state change occurred.
- **Activity** – The activity or state to which the user changed.
- **Details** – Additional details for the activity or state change.

#### To generate a User Activity Report:

1. On the **View** menu, point to **Activity Reports**, and then click **User**.
2. Under **Criteria**, in the **Report on** list, select the users to report on. Your choices are: **Individual user** or **Active users in time interval**.
3. In the **Start** box, type or select the start date and time of the interval that you want the report to cover. The time format is based on a 24-hour clock, for example, 4:00 P.M. is entered as 16:00.
4. In the **End** box, type or select the end date and time of the interval that you want to report on.
5. If multiple locations are configured, in the **Use time zone of** list, select the time zone option that you want use to generate the contents of the report. Your choices are **Local site** or **User location**.

6. If you selected **Individual user** in step 2, in the **Name** box, type or select the name of the user who you want to report on.
7. If you selected **Active users in time interval** in step 2, do the following:
  - a) Click **Find Now**. The system generates the list of users who were active during the specified time interval.
  - b) Under **Users**, select the check box for each user who you want to report on, or click **Select All**. You can select a maximum of 100 users.
8. On the **Actions** menu, click **Run Report**.
9. Click the **Results** tab to view the report results. A complete activity report can display a maximum of 40,000 records. An incomplete activity report (one that reaches 40,000 records before all the users have been processed), can display up to 60,000 records.

## 7.11 Generating a Source Activity Report

When you generate a Source Activity Report, the application displays historical, minute-by-minute, state and event data for all contacts from a source or list of sources during a specified time interval for a specified date range. You can specify multiple sources or use wildcards to generate a list of sources from which to choose.

---

**NOTE:** To generate a Source Activity Report, you must have the associated Manager permission.

---

Each row in the report provides details on an individual state change. The columns in the report are:

- **Source** – The source being reported on.
- **Time** – The date and time when the event or state change occurred.
- **Event** – The event or state to which the contact changed.
- **Subject** – This typically contains the target of the Event. For example, for a transfer, the Subject will be the user to whom the contact was transferred.
- **Details** – Additional details for the event or state change.

**To generate a Source Activity Report:**

1. On the **View** menu, point to **Activity Reports**, and then click **Source**.
2. Under **Criteria**, in the **Media type** list, select the media type that you want to report on. Your choices are **Voice** or **E-mail**.
3. In the **Start** box, type or select the start date and time of the interval that you want to report on. The time format is based on a 24-hour clock, for example, 4:00 P.M. is entered as 16:00.
4. In the **End** box, type or select the end date and time of the interval that you want to report on.
5. Depending on the media type you selected, in the resulting box (**Telephone number** or **E-mail address**), type or select the source that you want to report on. To specify multiple sources, separate each source with a comma. The system supports the use of one wildcard per source. You can use a wildcard on its own or to substitute one or more characters at the end of a source, for example:
  - The telephone numbers 123\* and \* are valid. However, \*567, \*567\*, and 56\*7 are not valid.
  - The e-mail addresses sales\* and \* are valid. However, \*sales, \*@\*, and sales@\*.com are not valid.
6. If you specified more than one source, do the following:
  - a) Click **Find Now**. The system generates a list of sources that match the criteria that you specified.
  - b) Under **Sources**, select the check box for each source that you want to report on, or click **Select All**. You can select a maximum of 100 sources.
7. On the **Actions** menu, click **Run Report**.
8. Click the **Results** tab to view the report results. A complete activity report can display a maximum of 40,000 records. An incomplete activity report (one that reaches 40,000 records before all the sources have been processed), can display up to 60,000 records.

## 7.12 Configuring the user reporting options

You can configure the default options that affect the reports that are generated by users.

### 7.12.1 Configuring the general user reporting options

You can configure the following general user reporting options:

- The notification method that is used to indicate when a historical report completes.
- The default output settings used when you configure a new report definition, and when you print, export, or send a report by e-mail (if enabled). You can override most of the default output settings in a specific report definition.

---

**NOTE:** The **Outgoing e-mail address** and **E-mail signature** boxes are available only if the e-mail reports option is enabled, and you have the **E-mail historical reports** Manager permission. For details on how to enable the e-mail reports option, see [Section 7.13.5, "Configuring the e-mail reports option", on page 144](#).

---

#### To configure the report notification methods:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Reporting**.
3. Under **When a Report Job Completes**, do the following:
  - To play a sound when the report is complete, click the **Play a sound** check box, and then type the name of the .wav file you want to play. You can click  to select the .wav file, and you can click  to play the selected .wav file.
  - To display a system message when the report is complete, select the **Log alarm to System Messages window** check box.
  - To display an icon in the system tray when the report is complete, select the **Show report icon in the system tray** check box.
4. Under **Default Output Settings**, do the following:

## Reporting

Configuring the user reporting options

- In the **Output folder** list, select the report folder where you want to send completed reports. You can choose the default Report Inbox or a custom report folder.
- In the **Printer name** list, select the printer where reports are printed.
- In the **File format** list, select the file format for reports that are exported. Your choices are Modern Microsoft Excel Workbook (.xlsx), Web Page (.htm), CSV (Comma Delimited) (.csv), or Portable Document Format (.pdf), Old Microsoft Excel Workbook (.xls).
- In the **Outgoing e-mail address** box, type the e-mail address that is used as the From address when sending completed historical reports by e-mail. This e-mail address is required if you intend to use the e-mail reports option. You cannot override this e-mail address in a report definition.

---

**NOTE:** The Outgoing e-mail address for E-mail reporting must be configured in the following way:

- Login into the Manager, in the BU System.
- Navigate to **Design Center > Email > Resources > Destinations**.
- Add a new E-mail address and select a Business unit.
- Login into Manager in the selected BU, then set the **Available for Outgoing** flag for the E-mail address.

E-mail server configuration (Email Servers, Destinations) must be done in Web Manager in the Application server if no E-mail license available.

---

- In the **E-mail signature** box, type the signature that is used when reports are sent by e-mail. The signature is plain text only.

5. Click **OK**.

---

**NOTE:** whisper to the agent when silently monitoring all calls,

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**NOTE:** To use the Whisper Coach feature, you must enable the **Silently Monitor All Calls** option on **User Real-time Report**. To make use of the Whisper Coach option, you must have the **Silently Monitor calls from user real-time reports** and **Barge in on calls from user real-time reports** Manager permission.

---

## 7.12.2 Whisper Coach **Configuring the directory options**

You must configure the options for each external LDAP directory that you want to be able to access from within the Manager application. A directory is used to select recipients when sending reports by e-mail.

Before you begin, the e-mail reports option must be enabled and the directory for which you want to configure the options must already be configured. For details, see [Section 7.13.5, "Configuring the e-mail reports option", on page 144](#) and [Section 5.5, "Configuring a directory"](#), respectively.

### 7.12.2.1 **Configuring the directory connection settings**

If an external LDAP directory that you want to access from within the Manager application requires user authentication, you must configure the connection settings for the directory.

#### **To configure the directory connection settings:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Reporting**.
3. Click the **Directory** tab.
4. Under **Directory**, in the **Select a directory to configure** list, select the directory for which you want to configure the connection settings.
5. Under **Connection**, click **Change**.
6. In the **Set Up Connection** dialog box, do the following:
  - a) In the **Account name** box, type the user name needed to access the directory.
  - b) In the **Password** box, type the password needed to access the directory.
  - c) In the **Confirm password** box, retype the password to confirm that you entered it correctly.
  - d) Click **OK**.

## Reporting

Configuring the user reporting options

### 7.12.2.2 Configuring the directory query settings

When you search a directory, you might need to perform several searches, and refine your search criteria for each new search. You can configure the query fields to save the search criteria that you enter, and use them as the default criteria for the next search.

At least one directory query field must be configured before you can configure the directory query settings.

**To configure the directory query settings:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Reporting**.
3. Click the **Directory** tab.
4. Under **Directory**, in the **Select a directory to configure** list, select the directory for which you want to configure the query settings.
5. Under **Query Field Settings**, click **Change**.
6. In the **Change Query Settings** dialog box, select the check box for each field that should save the search criteria you enter, and then click **OK**.

### 7.12.2.3 Configuring the directory results settings

You can configure how the results of a directory search are displayed, including the fields that are displayed, and the order in which they are displayed.

At least one directory results field must be configured before you can configure the directory results settings.

**To configure the directory results settings:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Reporting**.
3. Click the **Directory** tab.
4. Under **Directory**, in the **Select a directory to configure** list, select the directory for which you want to configure the results settings.
5. Under **Result Field Settings**, click **Change**.

6. In the **Change Results Settings** dialog box, do the following:
  - a) Select the check box for each field that you want to display. The top-to-bottom order of the fields in the list reflects the left-to-right order of the columns as they appear in the search results. You can use the up or down arrows to change the order of the fields in the list.
  - b) In the **Sort by** list, select the name of the field to sort on. Only selected fields appear as sort options.
  - c) In the **Sort order** list, select a sort order (**Ascending** or **Descending**).
  - d) Click **OK**.

### **7.12.3 Configuring the colors in reports**

You can create reports to view and compare routing states, contact states, contact types, and callback origins (if the callback feature is enabled). The application provides a set of default colors in which these items are displayed in the reports. You can change the default colors for the foreground and background of each of these items.

#### **To configure the colors in reports:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Reporting**.
3. Click the **Colors** tab.
4. For the item whose color you want to change, click the cell in either the **Foreground** or **Background** column. The  button appears in the column. A preview of how the item appears in the report is also displayed at the bottom of the dialog box.
5. Click  to open the **Color** dialog box.
6. In the **Color** dialog box, select the color you want to use, and then click **OK**.

## Reporting

Configuring the system reporting options

### 7.13 Configuring the system reporting options

You can configure the default settings that affect reports in the Manager application. For details, see the following topics:

---

**NOTE:** To configure any of the system reporting options, you must have Full or Modify access for the associated Manager permission.

---

#### 7.13.1 Configuring the global queue report intervals

The global queue report intervals are used in cumulative and historical queue reports to help you determine exactly when contacts are being enqueued since contacts can be in queue for a while. Cumulative and historical queue reports include breakdowns by interval of the time that customers wait before a contact is answered or abandoned, using the statistics "Answered in Interval" and "Abandoned in Interval". You can define up to five time intervals so that you can track the number of contacts that are answered by a user or abandoned within the different time intervals.

**To configure the global queue report intervals:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Reporting**.
3. Under **Global Queue Intervals**, do the following:
  - a) In the **Media** list, select the media type for which you want to configure the queue report intervals, for example, **Voice**.
  - b) In the **To** column for Interval 1, double-click the time and type the end time. The start of Interval 2 is updated to reflect the number you just typed.
  - c) In the **To** column for each other interval, double-click the time and type the end time. The end time for the last interval is always **Forever**.
4. Repeat step 3 for each media type you want to configure, and then click **OK**.

## 7.13.2 Configuring the first day of the week

Historical report definitions that have a range of This Week or Last Week display the Start date based on the configured first day of the week.

During installation, the host computer's Regional Options setting determines the default first day of the week. For example, for the United States, the default is Sunday, and for Germany, the default is Monday. Any time after installation, you can change this setting. The change will take effect in the next weekly rollup period. The change will not affect existing historical data which remains based on the previous setting.

**To configure the first day of the week for reporting:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Reporting**.
3. Under **First Day of Week**, in the **Select day** box, select the day of the week that you want to use as the Start date for historical reports that have a range of This Week or Last Week.
4. The application displays a warning to indicate that the change will not affect existing historical data which remain based on the previous setting.

## Reporting

Configuring the system reporting options

### 7.13.3 Configuring the queue real-time report options

You can choose the following options, which affect the queue and aggregate statistics that appear in real-time reports and wallboard and Broadcaster views:

- **Include ringing and unanswered contacts** – If you choose this option, contacts that are in Ringing, Pending, and Unanswered state will be included in the Contacts - Queued and Contacts - Overflowed statistics, and the time spent ringing will be included in the Wait Time statistic.
- **Use weighted averages** – By default, the system uses a simple average to calculate current and estimated statistical summaries in queue real-time reports and real-time aggregate statistics. This option allows you to use a weighted average, which takes into account the number of contacts in each queue. For example, suppose you have the following values:

Queue	Contacts - Received (Shift)	Service Level - Shift
Sales	10	90
Support	5	50

In this example, the service level calculated using the simple average is

$(90 + 50) / 2 = 70\%$ , and the service level calculated using the weighted average is  $[(10 * 90) + (5 * 50)] / 15 = 77\%$ .

Weighting is performed using the Contacts - Received (Shift) statistic when calculating shift statistics, and the Contacts - Queued statistic when calculating current and estimated statistics.

---

**NOTE:** Even when the **Use weighted averages** option is enabled, if there are no contacts in queue, the system uses the default simple average calculation method.

---

#### To configure the queue real-time report options:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Reporting**.

3. Under **Queue Real-Time Report**, do the following, and then click **OK**:
  - To include calls that are in Ringing and Unanswered state, as described above, select the **Include ringing and unanswered contacts** check box.
  - To use a weighted average to calculate summaries in real-time reports and real-time aggregate statistics, as described above, select the **Use weighted averages** check box.

#### **7.13.4 Configuring the workforce management output location**

The OpenScape Contact Center system automatically exports statistical and administration data in XML format to the ShareData\XMLOutput folder on the main server machine. You can use this XML data in a third-party workforce management application to simplify the user scheduling and workforce forecasting process. For a description of the XML data that is exported by the system, see the *Workforce Management Integration Guide*.

---

**NOTE:** The schema for the XML data is defined in the OSCCSchema.xsd file. For more information, contact your service representative.

---

## Reporting

Configuring the system reporting options

You can obtain the XML data in two ways:

1. You can copy the XML data from the ShareData\XMLEnabledOutput folder on the main server machine to a workforce management machine or other location. In this case, you must have read access to the ShareData\XMLEnabledOutput folder.
2. You can configure the system to write the XML data to a shared network folder (in addition to the ShareData\XMLEnabledOutput folder). In this case, you must:
  - Configure the output location (the location of the shared network folder), as described in the following procedure.
  - Ensure that the **hppc** user account on the main server machine has the permission to write the XML data to the configured output location.

### To configure the workforce management output location:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Reporting**.
3. Under **Workforce Management**, in the **Output location** box, type the full path to the folder where you want to write the XML data, in UNC format. You cannot use a mapped network drive. For example:  
\\WorkforceManagementMachine\XMLEnabledOutput\
4. Click **OK**.

## 7.13.5 Configuring the e-mail reports option

The e-mail reports feature allows completed historical reports to be distributed as attachments to e-mail messages. You can enable or disable the e-mail reports option for the system.

The reports are distributed using the corporate SMTP server configured in the Options dialog box. For details, see [Section 15.3.2, “Configuring the e-mail server settings”, on page 268](#).

### To configure the e-mail reports option:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Reporting**.
3. To enable historical reports to be distributed by e-mail, under **E-mail Reports**, select the **Enable** check box.
4. Click **OK**.

# 8 Routing

This chapter provides information on how to configure routing components and develop a routing strategy.

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**NOTE:** For information about user routing states please check section **5.2.1 About routing states** from OpenScape Contact Center V11 Agent Portal Web, User Guide.

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## 8.1 About group-based routing

Group-based routing is the process of matching a contact to the best group of users eligible to handle the contact.

When OpenScape Contact Center routes a contact to a queue, the primary step in the queue attempts to route the contact to any user in a primary group of users who are most qualified to handle the contact. If the primary group cannot handle the contact within the specified time, then the contact is routed to one or more overflow groups. The overflow mechanism is additive. At each point where a contact overflows to a new group, the new group of users is added to the current pool of available users.

### 8.1.1 Group setup considerations

A group can be any collection of users who share expertise or responsibility in some area and who are similarly qualified to handle incoming contacts. A single user can belong to several groups.

The first consideration in setting up groups is specialization. When you choose your groups, be as specific as your callers' requirements. In the simplest of scenarios, a service bureau might specialize in technical support for four different software products – Word Processing, Spreadsheet, Browser, and Project. In such a simple case, since the goal is to match caller requirements to a suitable user, you would set up one group for each product you support, and assign the specialists in those areas to the respective groups.

## Routing

### About group-based routing

If your areas of expertise are Stocks, Mutual Funds, and Bonds, and in each area, you offer services in two languages, you would consider six groups:

- Stocks/English
- Stocks/German
- Mutual Funds/English
- Mutual Funds/German
- Bonds/English
- Bonds/German

Apart from strict specialization, you should consider setting up a group for each additional functional area that will routinely be used as the first choice in routing a contact. For example, while your core areas of specialization might be Stocks, Mutual Funds, and Bonds, you may want first-time users directed to an Administration group for some form of preliminary processing. The best way to handle this is to set up an Administration queue, and use your routing strategy workflow to route first-time contacts to the Administration group.

In addition, if you have both specialists in particular areas and users with general abilities in one or more of your specialized areas, consider grouping the general users in backup groups that are intended as overflow options to your specialized groups. These groups could be used as overflow groups only, associated with several queues, and never be used as the primary group for a particular queue.

Since there is a strong correlation between group and queue setup, you should also consider factors that influence queue setup. For details, see [Section 10.2, “Queue setup considerations”, on page 193](#).

### 8.1.2 Configuring a group

In group-based routing (see [Section 8.1, “About group-based routing”, on page 139](#)), contacts are routed to a group where a user in the group can handle the contact.

After you have configured a group, you can assign it as a step in a queue definition (see [Section 10.3.2, “Configuring the queue steps”, on page 206](#)).

---

**NOTE:** To create or change a group, you must have Full or Modify access, respectively, for the **Groups** Manager permission. If the enhanced security option is enabled, you must also have the required security access to change the group. For details on the enhanced security option, see [Section 15.3.4, “Configuring the enhanced security option”, on page 272](#).

---

**To configure a group:**

1. On the **File** menu, point to **New**, then **Administration Center**, and then click **Group**.
2. On the **General** tab, under **Group**, do the following:
  - In the **Name** box, type a unique name for the group.

---

**NOTE:** You cannot change the name of a group after you save the group.

---

- In the **Description** box, type a description for the group. The group description should include the common information that determines which users belong in the group.

3. Click the **Users** tab.
4. Under **Include**, select the check box for each user who you want to add to the group. The list contains only the users who have the **Receive contacts routed by OpenScape Contact Center** User permission. All selected users should be able to handle the contacts that are routed to this group.

---

**NOTE:** You can also select the groups a user belongs to when you configure the user's properties. See [Section 4.1.3, “Configuring the contact handling settings for a user”, on page 32](#).

---

5. Click the **Reports** tab.

## Routing

Configuring the routing options

6. Under **Include**, select the check box for each report that you want to display data about this group. The list contains only the reports you own, or reports that are owned by users you can monitor.

---

**NOTE:** To add many groups to a report, you can open the group report definition, click the **Content** tab, and select all the groups that you want to add to the report.

---

7. Click the **Security** tab. This tab is available only if the enhanced security option is enabled. For details, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).
8. Under **Users**, select the check box for each user who you want to be able to modify this group. The list contains only the users who have Full or Modify access to the **Groups** Manager permission.
9. Click **OK**.

## 8.2 Configuring the routing options

You can configure the default settings that affect how contacts are routed within the OpenScape Contact Center system. For details, see the following topics:

- [Section 8.4.1, "Configuring the manual reserve time", on page 150](#)
- [Section 8.4.2, "Configuring the maximum offer time", on page 151](#)

---

**NOTE:** To configure any of the routing options, you must have Full or Modify access for the associated Manager permission.

---

## 8.2.1 Configuring the manual reserve time

When a contact is reserved for a user in a contact real-time report, the manual reserve time is the length of time for which the contact can be reserved. If the contact is not assigned to the user within the manual reserve time, the contact is returned to the queue. You set the manual reserve time globally for each media type.

---

**NOTE:** The time a contact spends reserved for a user is included in the wait time. Reserved contacts that remain unanswered before proceeding to the queue steps could adversely affect the service level calculation.

---

### To configure the manual reserve time:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Routing**.
3. Under **Manual Reserve Time**, for each media type in the table, double-click the cell in the **Time** column and then type the amount of time that a contact can be reserved for a user.
4. Click **OK**.

## 8.2.2 Configuring the maximum offer time

You can configure the maximum offer time for each media type. If a contact is not accepted within the specified offer time, it will be returned to the queue (if configured) or designated unanswered.

The maximum offer time depends on the media type:

- **Voice** – The amount of time that a user is given to answer a call.
- **Callback** – The amount of time that the application or a user, if the user has the **Preview callbacks** permission, is given to accept a callback.

## Routing

Configuring the routing options

- **E-mail** – The amount of time that the application is given to accept an e-mail message. This includes the time required to download the e-mail message from the corporate IMAP server.

---

**NOTE:** In a custom application, the user might be given the ability to manually accept a callback or e-mail message. In each of these cases, the maximum offer time is the amount of time that the user is given to manually accept the contact.

---

**NOTE:** You can configure the communication platform to use the OpenScape Contact Center Ring No Answer feature, which will requeue any contact that is not answered within the maximum offer time and place the user in Unavailable routing state. To configure the OpenScape Contact Center Ring No Answer feature, see [Section 11.5.3, "Configuring the communication platform settings", on page 223](#).

---

### To configure the maximum offer time:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Routing**.
3. Under **Maximum Offer Time**, for each media type in the table, double-click the cell in the **Time** column and then type a duration of time. For some media types this time refers to a user's reaction, for others to a reaction of the application.
4. Click **OK**.

# 9 Working with workflows

This chapter provides a detailed introduction to workflows, walks you through an exercise in creating a workflow, and provides information on related tasks.

The OpenScape Contact Center system uses the following types of workflows:

- Routing strategy workflows – see [Section 9.2, “About routing strategy workflows”, on page 146](#)
- Queue processing workflows – see [Section 9.5, “About queue processing workflows”, on page 174](#).

## 9.1 About workflow diagrams

A workflow diagram is a visual script similar to a programming flowchart. It defines the sequence of events that is used to route or process contacts in queue. Decisions can be based on existing OpenScape Contact Center information such as contact data, performance statistics, database queries, and schedule information. Information can also be retrieved from an external data source.

---

**NOTE:** A slow connection to a data source will affect contact center performance. Ensure that any data sources you connect to will not affect the productivity of your contact center.

---

A workflow diagram includes components and connection lines between the components to indicate the contact workflow.

- Components are stopping points in the workflow diagram. They can be used to make a decision based on data, update performance statistics, transfer a contact to another location, simply pause, or perform other tasks.
- Connection lines are used to indicate the contact workflow between the components. If a decision is required, one line is created for each possible output of the component.

Workflow diagrams are configured using the Design Editor.

## Working with workflows

About routing strategy workflows

## 9.2 About routing strategy workflows

A routing strategy workflow is a sequence of events that determines the routing of a contact in the contact center. Workflow processing can route a contact based on criteria such as time, the source or destination of the contact, information obtained by database lookup, and performance statistics. Other media-specific criteria, such as information collected from the customer using Call Director or keywords in e-mail messages, can also be used.

Ultimately, a routing strategy workflow must result in one of the following actions:

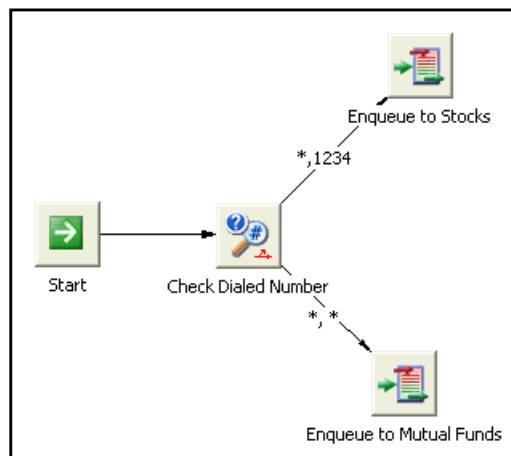
- Route the contact to a user.
- Route the contact to a queue.
- Disconnect or discard the contact.

You can also configure a routing strategy workflow to link to another routing strategy workflow, if required.

For each media type available in the contact center, OpenScape Contact Center provides a default routing strategy to route contacts to a default queue. You can make a copy of the default routing strategy and use it as the starting point for creating a new routing strategy workflow, or you can create a new one.

### 9.2.1 Basic routing strategy workflow example

The following diagram shows an example of a simple voice routing strategy workflow. It routes a contact to a queue based on the pilot number associated with a dialed number.



While simple, this example illustrates the most basic rules that you must follow when creating a routing strategy workflow. A routing strategy workflow:

- Begins processing at a **Start** component.
- Has intermediate processing that typically involves gathering information and making decisions based on that information. In the example, intermediate processing is provided by the **Check Dialed Number** component. Intermediate processing is normally more complex than shown here.
- Is terminated by a valid end component. In this example, the **Enqueue** components are the end components.

The small square objects are workflow components. You can trace the execution of a routing strategy workflow by following the connection lines that link the components in the workflow. Where a component branches into two or more execution paths, as in the case of the **Check Dialed Number** component, that component's execution involves a decision, and execution continues along only one of the paths depending on the results of the decision. The paths away from the component are known as outputs.

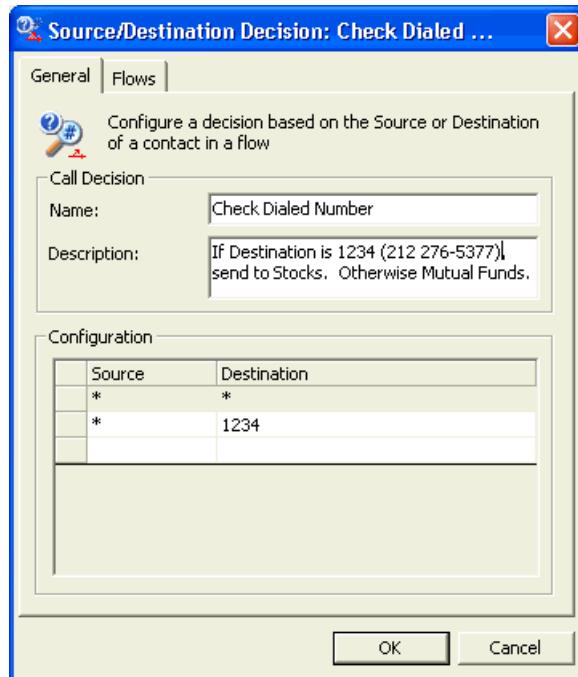


The icons on the components indicate different component types, which perform different actions. For example, while the **Enqueue to Stocks** and **Enqueue to Mutual Funds** components have different names, they are both Enqueue components. An Enqueue component's function is to route a contact to a specified queue.

## Working with workflows

### Routing strategy workflow considerations

The **Check Dialed Number** component is a Source/Destination Decision component.



A Source/Destination Decision component compares the source or destination associated with the incoming contact to a list of one or more sources and destinations specified when you create the component. In the example, the **Check Dialed Number** component checks the pilot number associated with the incoming call for a match with 1234. This destination is associated with the dialed number 212 BROKERS (212 276-5377) on the communication platform. If there is a match, the **Enqueue to Stocks** component will execute next. If they do not match, the **Enqueue to Mutual Funds** component will execute next.

## 9.3 Routing strategy workflow considerations

OpenScape Contact Center provides information from several sources that can be used in a routing strategy workflow. Some of this information can be used directly or indirectly in routing an incoming contact.

In planning your routing strategy workflow, you should focus on answering two questions:

- What information can a routing strategy workflow use to route contacts?

- How does a routing strategy workflow use that information to route contacts?

The following topics answer those questions.

### **9.3.1 Source/destination information**

When configuring a Source/Destination Decision component, you can provide a list of sources, destinations, or source/destination combinations that the component is to compare with the source/destination details of an incoming contact. Every source/destination pair entered results in an exit point for that Source/Destination Decision component. The default (\*,\*) entry in the list of source/destination combinations is also an exit point that can be used for the case where there is no specific matching entry.

---

**NOTE:** The format of voice sources and destinations available to OpenScape Contact Center depends on your geographic location and on communication platform programming. The examples provided in this book take the following forms: destinations are pilot numbers mapped to the dialed number, and sources are 10-digit North American telephone numbers.

---

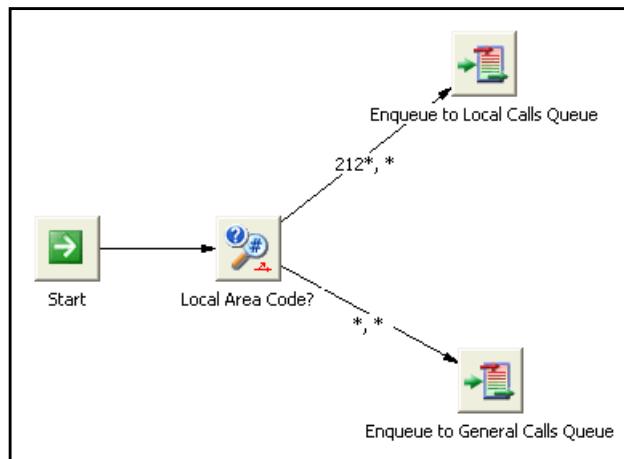
A destination is typically used directly in routing the contact to a queue. For example, if you have two lines, 212 BROKERS and 212 FUNDS4U, you could route the contact similarly to the routing strategy workflow shown in [Section 9.2.1, “Basic routing strategy workflow example”, on page 147](#). Contacts on the destination associated with 212 BROKERS (pilot number 1234) are routed to the Stocks queue, while contacts on the 212 FUNDS4U destination are enqueued to the Mutual Funds queue.

## Working with workflows

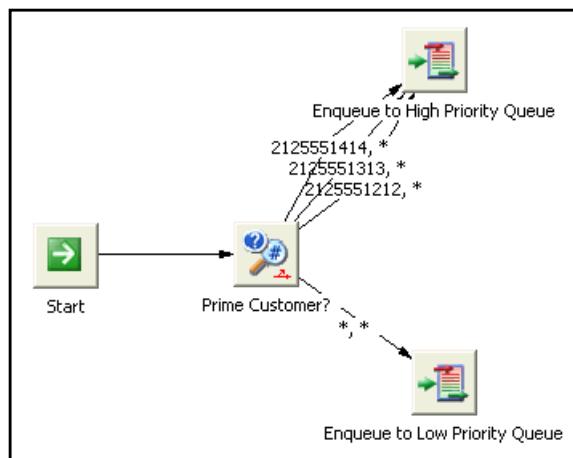
### Routing strategy workflow considerations

Similarly, there are a number of uses for the source associated with a contact. For example:

- For calls, you could make a source-based decision based on the caller's geographic location. Since the configuration of a Source/Destination Decision component lets you use wildcards, you could check the area code portion of the source of an incoming contact and enqueue the contact based on whether it is local.



- You could configure a Source/Destination Decision component to look for matches against the e-mail addresses or telephone numbers of your biggest accounts or customers. This would let you check the source of an incoming contact against those sources and route the contact based on that criterion. In the following example, three outputs from the **Prime Customer?** Source/Destination Decision component all link to the same Enqueue component.



### 9.3.2 Information collected from a call

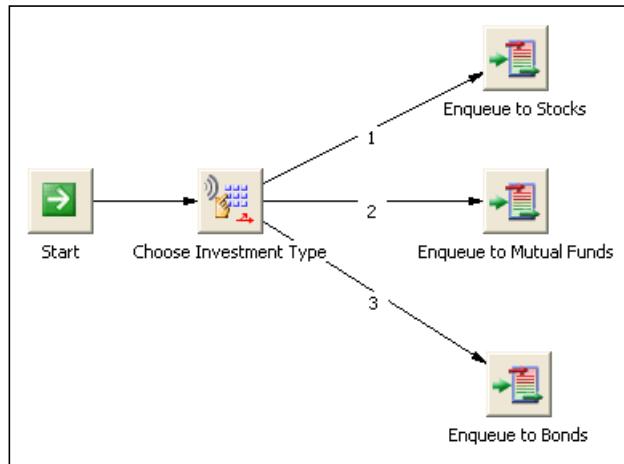
If you are using Call Director, the routing strategy workflow can drive Call Director to collect information from the caller. In the simplest scenario, you prompt the customer for the purpose of their call, and then use the information provided to direct the contact.

---

**NOTE:** In addition to using Call Director, you can also use an IVR to collect information from the caller.

---

For example, you could use a single 212 UINVEST line to service customers interested in talking to specialists in the areas of Stocks, Mutual Funds, or Bonds. When a contact arrives in OpenScape Contact Center, a menu could prompt the caller to choose one of these options.



In this example, **Choose Investment Type** is a Menu Prompt component. When you configure a Menu Prompt component, you specify the valid choices that a customer can make. You can then create an exit point on the Menu Prompt component for each of those choices. In the **Choose Investment Type** component, the three valid exit points correspond to Stocks, Mutual Funds, and Bonds.

In the above example, the caller's choices directly choose a queue. The information that you collect from the customer does not have to be used so directly. For example, you could prompt the user to make one of two choices:

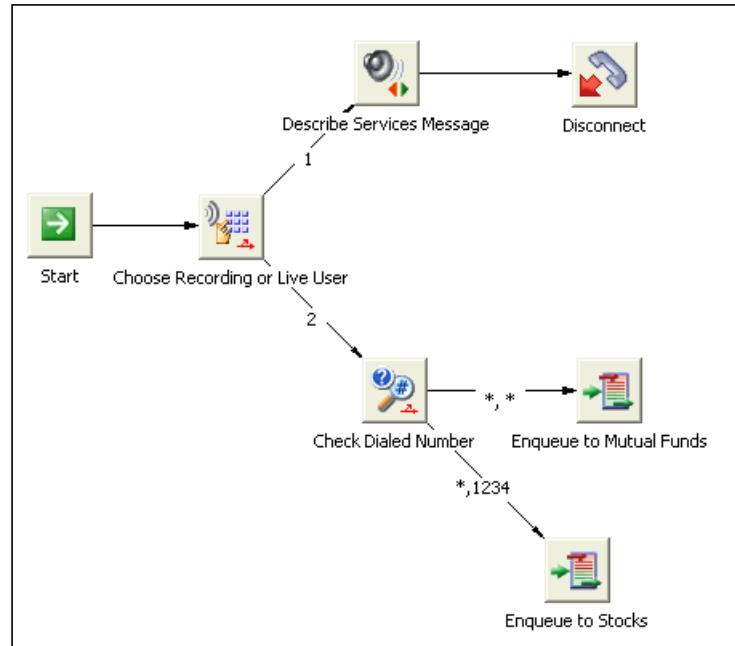
- **To hear a list of services we offer, press 1**
- **To talk to an agent, press 2**

If the caller presses 1, you play them a simple message and then disconnect. If the caller presses 2, you route the contact based on the destination. The following diagram illustrates the routing strategy

## Working with workflows

Routing strategy workflow considerations

workflow that executes this strategy. The **Describe Services Message** is a Message component. It plays the caller a recorded message then passes execution to the next component.



In addition to menu prompting, if OpenScape Contact Center is working with Call Director, you can have a routing strategy workflow perform simple digit collection, such as having callers provide a credit card number.

### 9.3.3 Scheduling information

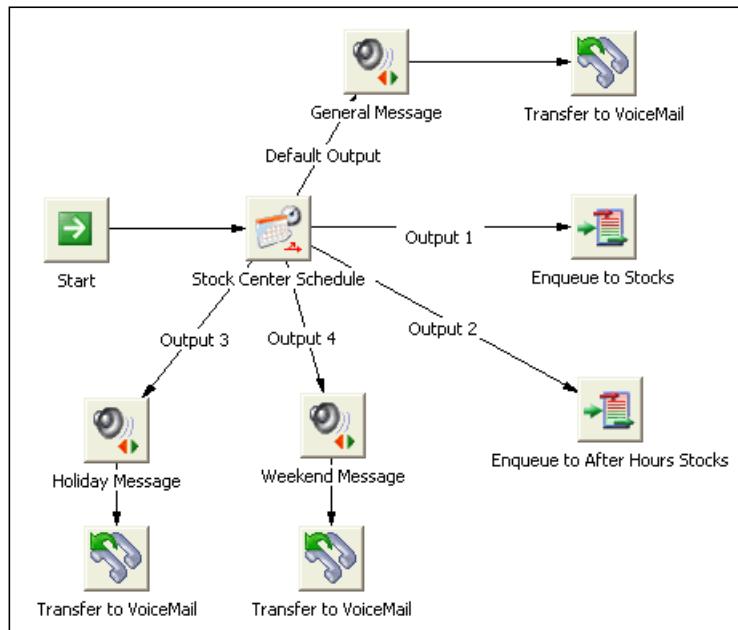
You can set up OpenScape Contact Center schedules that dictate how contacts are treated based on the time of day, day of week, and specific dates. You can set up schedules to handle contacts according to:

- Time of day and days of the week when your contact center is open
- Specific dates through the year that the contact center is closed
- Routing requirements changing throughout the day. For example, you may have different shifts working at different times with different staffing and contact volume requirements

For example, assume that you have the following voice scenario:

- During normal business hours, Monday through Friday, contacts to 212 BROKERS are directed to the Stocks queue. The Stocks queue is configured to route the contacts to specialists in the area of stocks, almost exclusively. You have similar setup for inquiries on Mutual Funds and Bonds.
- After-hours traffic is much lighter than through the day, and you have a smaller, less specialized staff working in the evening. With these factors, you lose the benefits of highly specialized queues. Between 5:00 P.M. and 9:00 P.M., contacts to 212 BROKERS could be directed to a General After Hours queue. That queue could initially try to match the contact to a stocks specialist, subsequently relax matching so that the contact is handled by a less-qualified user, and be configured to time out to a voice mail extension.
- The contact center is closed Saturday and Sunday every week. You want a specific weekend message played to customers on these days.
- The contact center is closed all day, January 1. You want a specific holiday message played to customers on this date.
- At all other times when the contact center is closed, you want a general message played to customers.

The following diagram shows a routing strategy workflow that performs the routing for this scenario.



## Working with workflows

### Routing strategy workflow considerations

**Stock Center Schedule** is a Schedule component. When configuring a Schedule component you create a specific case for each time/day/date that requires different handling. Any times and dates not covered by these cases are treated as a default case. Outputs 1 through 4 correspond to the daytime, evening, weekend, and January 1 periods mentioned above. The default output corresponds to all times not defined for Outputs 1 through 4.

You are not restricted to a single schedule. You can reference multiple schedules in the same workflow. If your contact center has a wide variety of functional areas, you might require a separate schedule for each area. You might for example, want to associate a separate schedule with each destination supported by your contact center.

For an example of how you set up a Schedule component, see [Section 9.10.3, "Adding a Schedule component", on page 185](#).

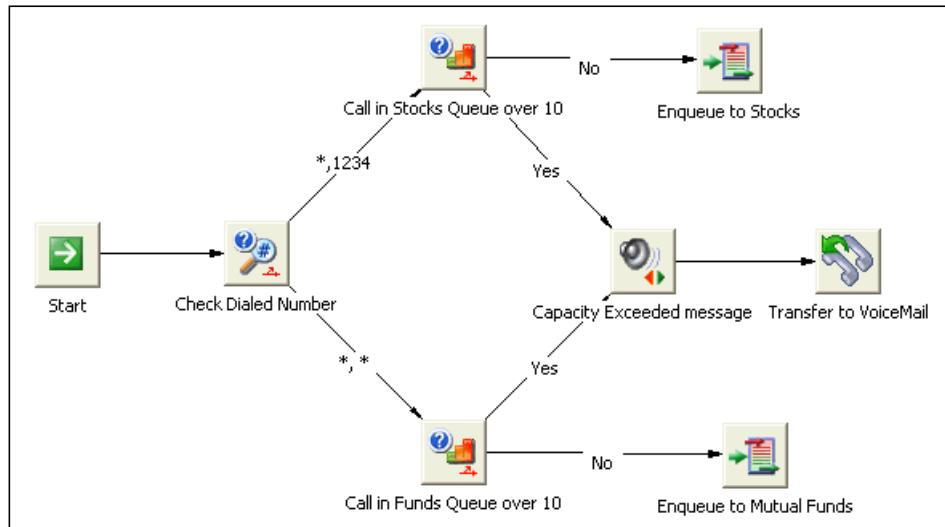
### 9.3.4 Statistics

OpenScape Contact Center maintains a continually updated set of performance statistics. In general, OpenScape Contact Center keeps track of:

- Count statistics such as the number of currently available users in a group, number of contacts waiting, and number of users logged on.
- Calculated statistics such as the current service level, estimated wait time, and abandoned time.

A routing strategy workflow has access to a number of these statistics at the queue level. This allows you to base your routing on current conditions, such as contact volume and staffing levels.

For example, prior to enqueueing, you could check the current number of contacts waiting in a voice queue. If there were no contacts waiting, or an acceptably small number, you would route the contact to that queue. Otherwise, you could play the caller a message and then transfer the contact to voice mail.



In this example, **Calls in Stocks Queue over 10** and **Calls in Funds Queue over 10** are Performance Decision components. This component type performs a simple comparison on a specific statistic using comparison operators such as equals, over (greater than) and under (less than). It then passes execution to the next component depending on whether the test returned yes (true) or no (false).

### 9.3.5 Contact data

Each contact being processed by OpenScape Contact Center has a set of information, referred to as contact data, that is available for the life of the contact. You can use the contact data to keep track of arbitrary information about the contact. You can make use of the contact data in a workflow to help you route a contact or for other purposes.

You can think of the contact data as a list of key/value pairs. For example, the following table demonstrates contact data consisting of four key/value pairs.

Key	Value
Name	Bill Lee
Address1	955 Morning Glory Circle
Address2	Buffalo, New York
Source	(716) 555-1212

Table 2 Contact data as a list of key/value pairs

## Working with workflows

### Routing strategy workflow considerations

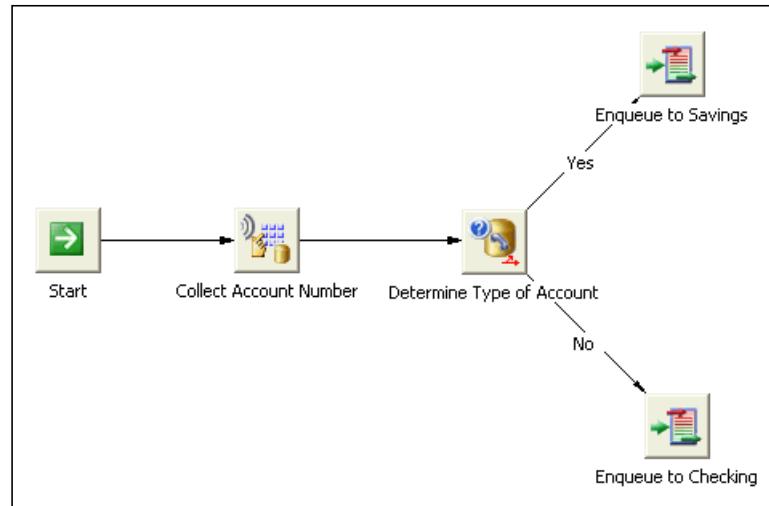
With some of the component types available for use in a routing strategy workflow, you can write key/value pairs to the contact data. For example, the contact data shown in the table could have been created by retrieving a record from a customer database and writing the results to the contact data.

---

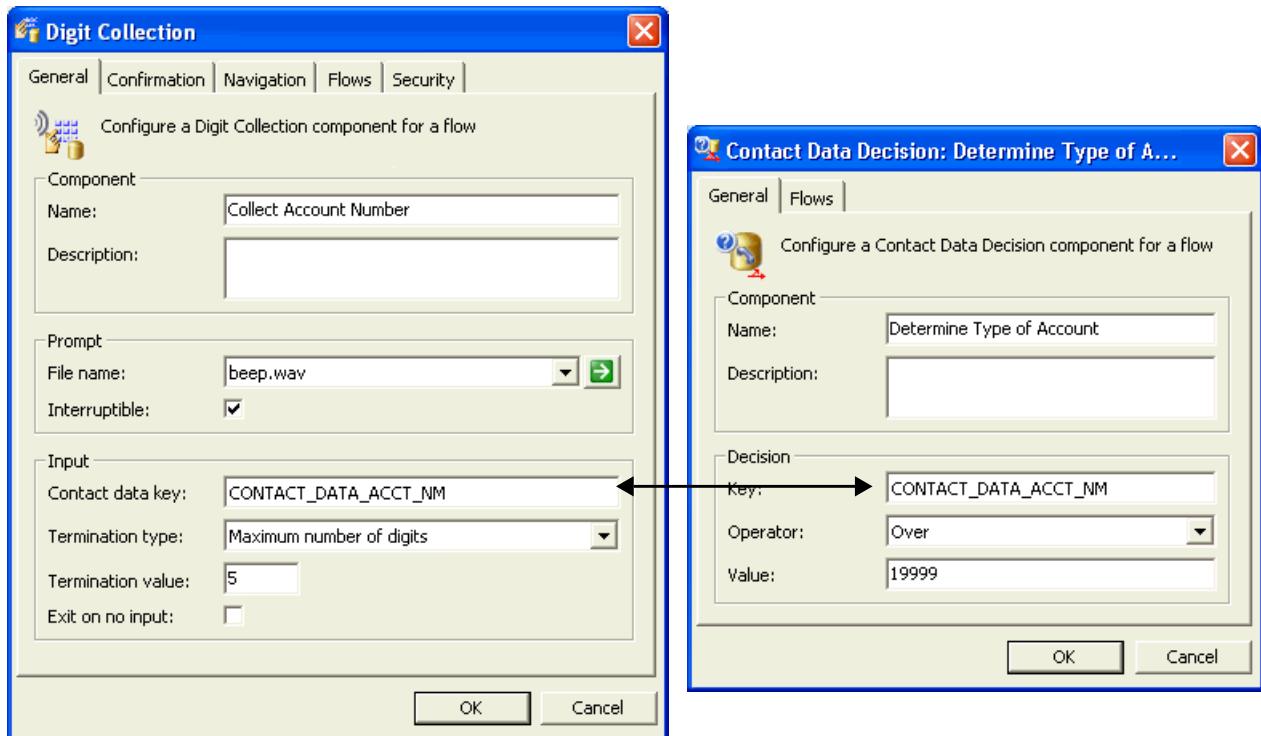
**NOTE:** For more information on database lookup in a routing strategy workflow, see [Section 9.3.6, "Database functions", on page 158](#).

---

You can also make routing decisions based on values in the contact data. For example, in a banking situation, when a call arrives in OpenScape Contact Center, you could have a customer enter their account number. This number might be used to identify the account as a savings or checking account. Writing this value to the contact data would allow you to later queue the contact using that criterion.



In this example, **Collect Account Number** is a Digit Collection component and **Determine Type of Account** is a Contact Data Decision component. The configuration for these components are shown below.



The **Collect Account Number** component prompts the customer for an account number and writes the provided digits as the value of a contact data key/value pair associated with the key CONTACT\_DATA\_ACCT\_NM. In this example, checking account numbers are in the range 10001 through 19999 while savings account numbers are in the range 20000 through 29999. The **Determine Type of Account** component passes execution to one of the two Enqueue components, based on which of these ranges the CONTACT\_DATA\_ACCT\_NM value falls within.

---

**NOTE:** Digit Collection components are available only if OpenScape Contact Center is working with Call Director.

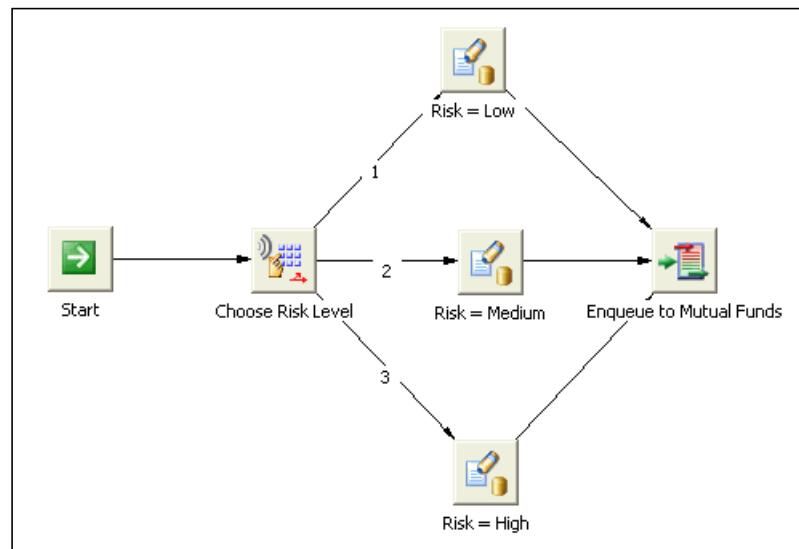
---

Contact data information does not have to be used strictly in routing a contact. You can also record information to be used later, to record a caller's previous choices for example. Contact data is also useful to the user who is handling the contact.

## Working with workflows

### Routing strategy workflow considerations

For example, you might want callers to 212 FUNDS4U routed directly to the Mutual Funds queue. To do this, when a contact arrives, you could use a Menu Prompt component to allow the caller to indicate one of three levels of risk tolerance (high, medium, low). You could then record the choice in the contact data using a Contact Data Update component. In this example, the **Risk = Low**, **Risk = Medium**, and **Risk = High** components are Contact Data Update components.



This information would then be available to the user answering the contact. Alternatively, after the contact is enqueued, you might want to use this information in a queue processing workflow to choose a relevant message to play to the caller while the caller waits.

---

**NOTE:** You can pass contact data as a parameter to a DLL or COM module called from a Custom Function component. For details, see [Section 9.3.7, "Custom functions", on page 166](#).

---

### 9.3.6 Database functions

If you have access to an ODBC-compliant data source, you can use any SQL statement in a routing strategy workflow to query or update the data source. While the most common use of this action is to access

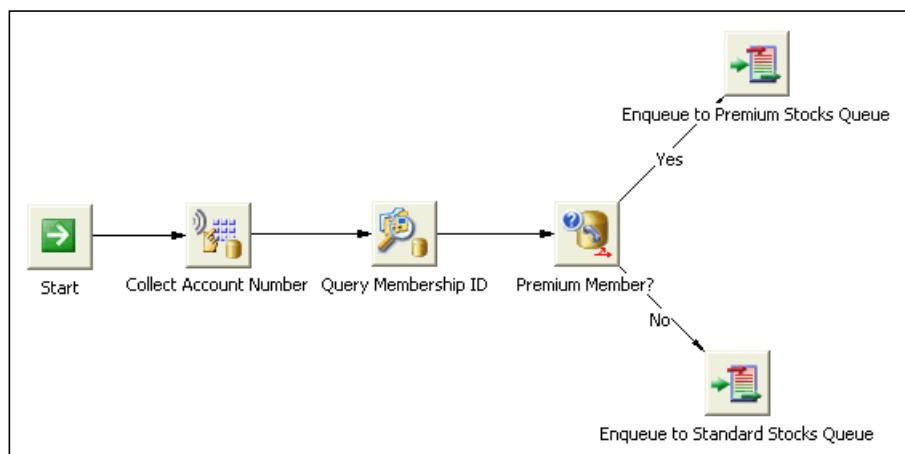
customer database information, this functionality can be used for other purposes, for example, to access product information or other information used in routing the contact.

---

**NOTE:** In case you are querying data with non-west-european characters, be sure that your ODBC-compliant data source uses UTF-8 encoding and not any other code page containing those characters.

---

For example, your contact center could have two levels of customer membership: standard and premium. When a call arrives in OpenScape Contact Center, you could prompt the caller for their membership ID. You could then query the database to check the caller's membership level, and enqueue premium members to a queue set up specifically for premium members.



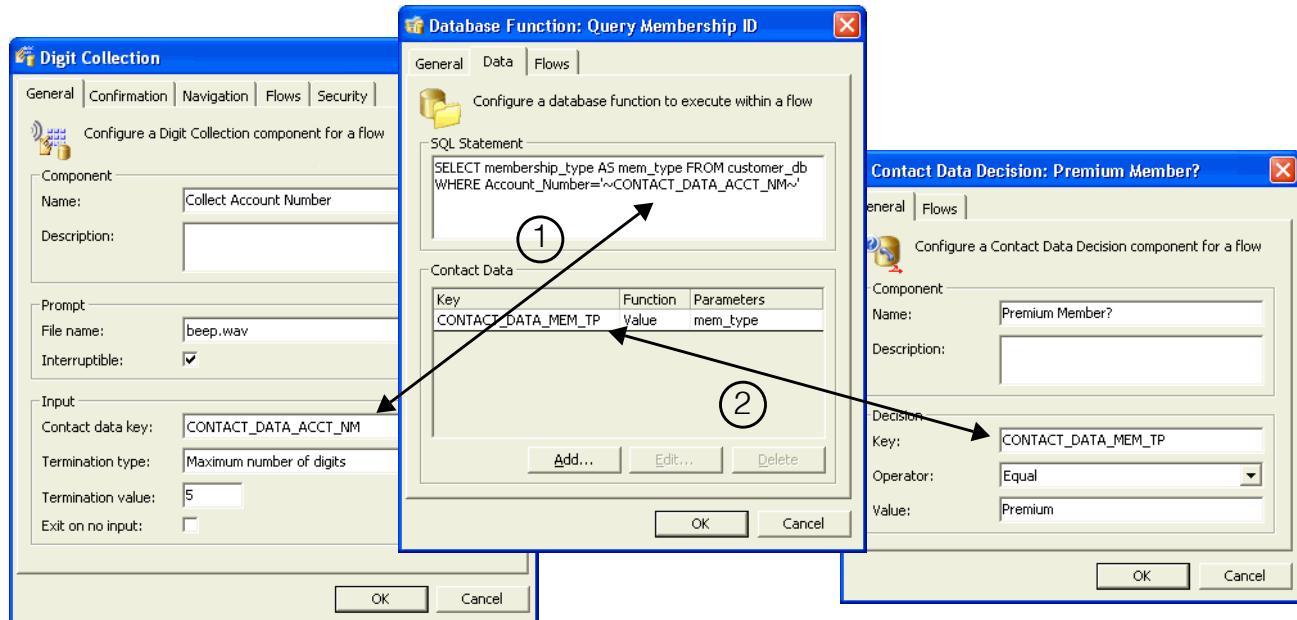
In this example, **Query Membership ID** is a Database Function component. A Database Function component lets you issue a query to an ODBC data source based on a contact data value. The results can be formatted and written to the contact data record for subsequent use.

The configuration of the **Collect Account Number**, **Query Membership ID**, and **Premium Member?** components are shown below. The **Collect Membership ID** Digit Collection component

## Working with workflows

### Routing strategy workflow considerations

prompts the customer for a membership ID and writes the provided digits as the value of a contact data key/value pair associated with the key CONTACT\_DATA\_ACCT\_NM.



#### The **Query Membership ID** Database Function component:

1. Issues a query with a WHERE clause that returns the record associated with the CONTACT\_DATA\_ACCT\_NM key's value. For details and examples of query construction, see the [Section 9.3.6.1, "Formatting database functions", on page 160](#).
2. Writes the membership\_type returned with the record as the value of a contact data key/value pair associated with the key CONTACT\_DATA\_MEM\_TP.

### 9.3.6.1 Formatting database functions

This section provides details and examples on the use of variables and parameterization in a Database Function component.

#### Variable substitution

You can use the ~ (tilde) character to populate the variables in an SQL statement:

- If the data type is a string, use '~VARIABLE~'.
- If the data type is numeric, use ~VARIABLE~.

You can specify a variable that takes its value from the contact data, or you can use the predefined SOURCE, DESTINATION, and CONTACTID variables, which take their values from the communication platform or enqueue request.

---

**NOTE:** If you use the SOURCE or DESTINATION variable, the contact source (ANI) or contact destination (DNIS) will be used, respectively, unless SOURCE or DESTINATION has already been specified as a contact data key, in which case, the value from the contact data will be used. If you use the CONTACTID variable, the Contact ID will always be used, regardless of whether it has been specified as a contact data key.

---

**NOTE:** For details on how to work with contact data, see [Section 9.3.5, "Contact data", on page 155](#).

---

Assume the following key/value pairs exist in the contact data:

<Caller\_Name, Peter> and <Order\_Number, 13478>

You can specify a contact data key name as a variable.

If the SQL statement on the Data tab is:

```
SELECT First_Name AS Name FROM Customer_table WHERE  
First_Name = '~Caller_Name~'
```

the actual database query will be:

```
SELECT First_Name AS Name FROM Customer_table WHERE  
First_Name = 'Peter'
```

If the SQL statement on the Data tab is:

```
SELECT Number AS Destination_Number FROM Customer_table  
WHERE Number = ~DESTINATION~
```

the actual database query will use the destination associated with the call:

```
SELECT Number FROM Customer_table WHERE Number = 1234
```

### **Formatting data retrieved using SQL**

SQL statements are required when you create a Database Function component. Information is retrieved from or inserted into the data source using SQL.

You can use any SQL statement to retrieve data in a Database Function component, including stored procedures. If you use a stored procedure, you must code the procedure so that the returned data type

## Working with workflows

### Routing strategy workflow considerations

is supported by ODBC. Also, you must name the values in the returned data so that they can be used later by the Database Function component.

For detailed information on how to use SQL, refer to your SQL documentation.

---

**IMPORTANT:** You should create an SQL statement only if you are experienced in SQL.

---

After the information is extracted from the database, and then formatted, the information can be added to the contact data with a key you specify. You can use the contact data in other components of a workflow to make decisions.

The following functions can be used to extract information from the database value:

- ["Value function example"](#)
- ["Substring function example"](#)
- ["Rightstring function example"](#)
- ["Combine function example"](#)
- ["Tag function examples"](#)

You can use variable substitution to enhance your database query by integrating the database query with contact data information.

#### **Value function example**

Example: Extract an order number for customer # 1234

Sample data:

A database table "Orders" contains a Customer\_ID, Customer\_Name, Order\_Date, and Order\_Number. For example, the data reads: 1234, John Smith, 03222004, D65746.

Sample SQL statement:

```
SELECT Order_Number AS Current_Order_Number FROM Orders  
WHERE Customer_ID = 1234
```

Result of SQL database search:

D65746, in the variable Current\_Order\_Number

Use the **Value** function with the parameter **Current\_Order\_Number** to extract the order number without any formatting. In the **Contact Data** dialog box, in the **Key** box, type the contact data key

Order\_Number\_Key, or any other key name. The contact data will contain Order\_Number\_Key, D65746 after the component is executed in a workflow.

### **Substring function example**

Example: Extract the first three characters of the order number which indicate the region for the customer.

Sample data:

A database table “Orders” contains a Customer\_ID, Customer\_Name, Order\_Date, and Order\_Number. For example, the data reads: 1234, John Smith, 03222004, D65746.

Sample SQL statement:

```
SELECT Order_Number AS Order_Region FROM Orders WHERE  
Customer_ID = 1234
```

Result of SQL database search:

D65746, in the variable Order\_Region

Use the **Substring** function with parameters **Order\_Region, 1, 3** to extract the characters 1 – 3 of the Order\_Region. In the **Contact Data** dialog box, in the **Key** box, type the contact data key Region, or any other key name. The contact data will contain Region, D65 after the component is executed in a workflow.

### **Rightstring function example**

Example: Check to see if a customer had an invoice in the current year.

Sample data:

A database table “Orders” contains a Customer\_ID, Customer\_Name, Order\_Date, and Order\_Number. For example, the data reads: 1234, John Smith, 03222004, D65746.

Sample SQL statement:

```
SELECT Order_Date AS Current_Order_Date FROM Orders WHERE  
Customer_ID = 1234
```

Result SQL database search:

03222004, in the variable Current\_Order\_Date

Use the **Rightstring** function with parameters **Current\_Order\_Date, 4** to extract the last four numbers of the Current\_Order\_Date. In the **Contact Data** dialog box, in the **Key** box, type the contact data key Year. The contact data will contain Year, 2004 after the component is executed in a workflow.

## Working with workflows

Routing strategy workflow considerations

### Combine function example

Example: Highlight the order number for a rush order to a special customer.

Sample data:

A database table "Orders" contains a Customer\_ID, Customer\_Name, Order\_Date, and Order\_Number. For example, the data reads: 1234, John Smith, 03222004, D65746.

Sample SQL statement:

```
SELECT Order_Number AS Current_Order_Number FROM Orders  
WHERE Customer_ID = 1234
```

Result of SQL search in database:

D65746 in the variable Current Order Number

Use the **Combine** function with parameters

**Current\_Order\_Number, "-SO"** to extract data from Current\_Order\_Number. In the **Contact Data** dialog box, in the **Key** box, type the contact data key Order Number. The contact data will contain Order Number, D65746-SO after the component is executed in a workflow.

---

**NOTE:** In the **Combine with space** function, the only difference is that a space is added between the two parameters.

---

### Tag function examples

XML text is parsed using the following criteria:

- Every element must have an opening tag and a closing tag.
- Only one top level element is allowed.
- You can search only on child elements, not attributes.
- You can search for elements on different levels.

Example: Select a particular customer (in this case the second) from XML text.

Sample Data:

A database table, "Customer" contains Names and Country\_Codes. For example, the Names data reads:  
<Customer\_Record><Customer\_Name>Peter Jones</Customer\_Name><Customer\_Name>John Smith</Customer\_Name></Customer\_Record>, and the Country\_Codes is 01.

Sample SQL statement:

```
SELECT Names AS Full_Name FROM Customer WHERE  
Country_Codes = 01.
```

Result of search:

```
<Customer_Record><Customer_Name>Peter Jones</  
Customer_Name><Customer_Name>John Smith</  
Customer_Name></Customer_Record>
```

Use the Tag function, with the parameters **Full\_Name**, **“Customer\_Name”**, **2** to extract the second occurrence of Full\_Name. In the **Contact Data** dialog box, in the **Key** box, type the contact data key Name. The contact data will contain Name, John Smith, after the component is executed in a workflow.

---

**NOTE:** The Tag parameter must be in quotation marks.

---

Example: Select elements from different levels within XML text.

Sample Data:

```
<contact category="Sales"><fullname>John Smith</  
fullname><phonenumbers><home>8015552323</  
home><cell>8015553232</cell></phonenumbers><email  
address='jsmith@email.com' /></contact>
```

Search for full name (element labeled “fullname”)

Result: John Smith

Search for telephone numbers (element labeled “phonenumbers”)

Result: 80155523238015553232

Search for home telephone number (element labeled “phonenumbers” and sub-element “home”)

Result: 8015552323

Search for attribute category (element labeled “category”)

Not allowed – you can search only for a child element as in previous examples.

Search for contact category (element labeled “contact category”)

Not allowed – contact is a tag name, category is an attribute name. They cannot be used together in a search.

Search for contact (element labeled “contact”)

Result: John Smith80155523238015553232

---

**NOTE:** E-mail address does not go into this search result because it is stored in the attribute instead of a child element.

---

### 9.3.7 Custom functions

The workflow components provided with OpenScape Contact Center provide a wide range of functionality that lets you collect information on incoming contacts, make routing decisions, and otherwise automate aspects of your contact center. You can also make use of functionality that is outside the scope of the topics covered in this chapter.

You can write a custom function in a DLL or COM module and call the function from a routing strategy or queue processing workflow, for all supported media. The function is passed contact data associated with the contact and the function can:

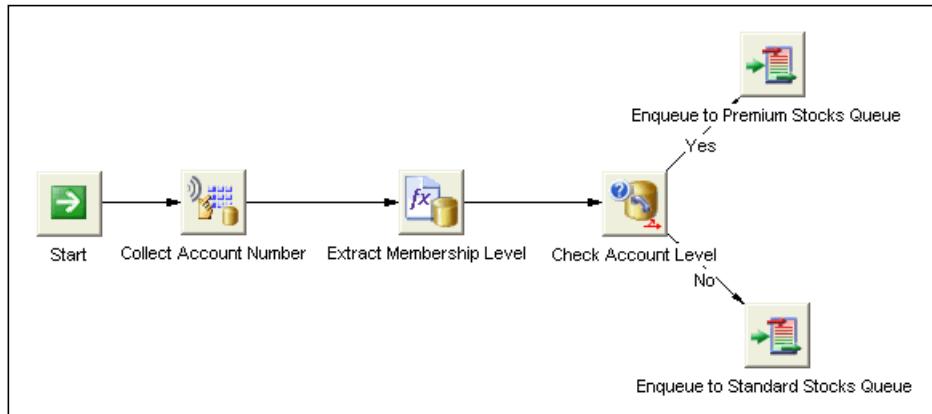
- Modify the provided contact data values – For example, if you prompted the customer for a seven-digit account number, you could have the workflow format the number to include spaces or dashes, for display purposes.
- Add new contact data for use in the workflow – This would be useful if you wanted to make use of a value not normally available in a workflow. This might be derived from information passed as inputs, by a calculation for example. Similarly, the information might be obtained from a third party source, by a database query for example, processed in some way and passed back to the workflow. After the custom workflow finishes executing, the new information is available as contact data for use in the workflow.
- Perform tasks that are entirely outside the scope of OpenScape Contact Center processing – You could, for example, write contact details out to a custom contact log.

---

**NOTE:** For details on how to work with contact data, see [Section 9.3.5, "Contact data", on page 155](#).

---

After you have written and compiled a custom function, you can call the function in a routing strategy or queue processing workflow. In the following example, the caller is prompted for a seven-digit account number.



The account number is written to the contact data and it is the responsibility of the **Extract Membership Level** Custom Function component to parse out the third, fourth, and fifth digits, corresponding to the caller's membership level, and create a new contact data key/value pair with these digits. The contact could then be enqueued based on whether the three digits constitute a premium or general membership.

### 9.3.7.1 Programming custom functions

This section provides direction in writing DLLs and COM module functions used in conjunction with Custom Function components.

#### Contact data as input and output parameters

When a DLL or COM custom function is called, it is passed a configured subset of the current contact data as a character string. Similarly, the custom function is expected to return a set of updates to the contact data as a character string.

---

**NOTE:** A queue set up to use the supplemental information feature can collect contact information and store it as contact data. For more information, see [Section 10.3.1.1, "About the supplemental information feature", on page 205](#).

## Working with workflows

Routing strategy workflow considerations

### Datatype and declaration

Parameters storing the contact data input and output parameters must be declared as single byte character strings in DLLs and as BSTR (wide) character strings in COM modules. The following table shows the declarations.

Type	Declaration
DLL	long = CustomFunction(char * pInput, char * pOutput)
COM	HRESULT = CustomFunction(BSTR bstrInput, BSTR bstrOutput)

Table 3

Sample COM and DLL function declarations

---

**NOTE:** The custom function does not have to be named

**CustomFunction.** The function name can be any value legal for a COM module or DLL function.

---

The first parameter stores the contact data key/value pairs to be passed into the custom function while the second parameter is used to return the contact data modified by the custom function to the workflow that called the custom function. The type of character data that may be stored and passed in both the input and the output parameters is restricted to ISO-8859-1 compatible characters:

- When the interface type is a DLL component, the characters must be ISO-8859-1 single byte characters.
- When the interface type is a COM component, the parameter contents must be encoded as UNICODE code page 28591 (ISO 8859-1 Latin 1).

### Contact data string layout

Contact data is passed to and returned from custom functions in character strings. The first two characters in the string store the number of key/value pairs and each subsequent block of 160 characters stores a key/value pair. Up to 99 key/value pairs can be passed into and returned from the custom function.

Within each record, the first 32 characters are reserved for the contact data key and the remaining 128 characters are reserved for the contact data value. Unused bytes within these key and value string fields must be padded with NULL values (binary zero).

For example, the following diagram shows the layout of the character string used to pass the contact data key/value pair **PIN/1234** into a custom function:

Char Position	1-2	3-5	6-34	35-38	39-162
Char	01	PIN	null	1234	null

The output string passed back to OpenScape Contact Center from the custom function is formatted using the same rules. The number of key/value pairs passed within the input parameter and the output parameter may differ. The following diagram shows the layout of a character string used to return contact data from a custom function. The contact data input above has been updated to include an address, **Address/2211 High Street**, possibly obtained by a database query.

Char Position	1-2	3-5	6-34	35-38	39-162	163-169	170-194	195-210	211-322
Char	02	PIN	null	1234	null	Address	null	2211 High Street	null

### Constraints

When writing a custom function, observe the following constraints:

- Ensure that the function called from the Custom Function component, and any functions it calls in turn, are threadsafe. These functions must be reentrant and multiprocessor-safe.
- During execution of the custom function, memory ownership remains with the Routing Server. Custom functions should not perform memory allocations or reallocations for the input nor the output strings nor delete them.

### Runtime restrictions

After the input parameters are packaged, the custom function is called. During this time, workflow execution for the contact is halted. The COM module or DLL function must finish execution within five seconds.

When a custom function completes successfully, workflow execution resumes at the component that follows the Custom Function component. To indicate successful execution, a custom function must return one of the following return codes:

- For DLLs, 0
- For COM modules, a value that can be validated with the SUCCEEDED macro

## Working with workflows

### Routing strategy workflow considerations

In addition to the return code and time limit restrictions imposed by OpenScape Contact Center, runtime errors in the custom function code can result in exceptions. If an exception is raised during the execution of the custom function, OpenScape Contact Center terminates workflow processing.

If the function does not successfully complete within five seconds, returns a return code other than those described above, or otherwise throws an exception, the next action will depend on the type of workflow that called the custom function:

- If a routing strategy workflow called the custom function, the contact is enqueued to the error queue specified for that routing strategy or to the global error queue specified for the associated media if no routing strategy error queue is specified.
- If a queue processing workflow called the custom function, the queue processing workflow terminates. For calls, the contact returns to default communication platform treatment. For other contact types, the workflow simply terminates and the contact remains enqueued. For all media, OpenScape Contact Center will continue to try to match the contact to a user.

---

**NOTE:** When a custom function fails, an error code and description are displayed in the System Monitor application.

---

### Sample DLL source code

The following is an example of the source code for a custom function called within a DLL.

```
CustomFunctionExampleDLL.cpp : Defines the entry point for the DLL
application.
//  
  
#include <stdlib.h>
#include "stdafx.h"  
  
BOOL APIENTRY DllMain( HANDLE hModule,
                        DWORD  ul_reason_for_call,
                        LPVOID lpReserved
)
{
    return TRUE;
}
extern "C"
{
    __declspec(dllexport) long CustomFunctionExample(const char * dataIn, char
* dataOut)
{
    // Determine number of input parameters
    char numParametersAsString[3] = {dataIn[0], dataIn[1], '\0'};
    const unsigned int numParameters = atoi(numParametersAsString);

    const unsigned int HEADER_SIZE = 2;
    const unsigned int KEY_SIZE = 32;
```

```
const unsigned int VALUE_SIZE = 128;

// Read each input parameter
for (unsigned int i = 0; i < numParameters; i++)
{
    char key[KEY_SIZE] = {0};
    char value[VALUE_SIZE] = {0};

    const unsigned int keyIndex = HEADER_SIZE + i * (KEY_SIZE +
VALUE_SIZE);
    const unsigned int valueIndex = keyIndex + KEY_SIZE;

    memcpy(key, dataIn + keyIndex, sizeof(key));
    memcpy(value, dataIn + valueIndex, sizeof(value));
}

// Return a single output parameter
dataOut[0] = '0';
dataOut[1] = '1';

char outputKey[KEY_SIZE] = {'O', 'U', 'T', ' ', 'K', 'E', 'Y', '\0'};
char outputValue[VALUE_SIZE] = {'O', 'U', 'T', ' ', 'V', 'A', 'L', 'U',
'E', '\0'};

memcpy(dataOut + HEADER_SIZE, outputKey, sizeof(outputKey));
memcpy(dataOut + HEADER_SIZE + KEY_SIZE, outputValue,
sizeof(outputValue));

return 0;
}
```

## 9.4 Configuring a routing strategy workflow

A routing strategy workflow is typically used to route a contact to a queue, but the contact can also be routed to a user or disconnected or discarded. For more information, see [Section 9.2, "About routing strategy workflows", on page 146](#).

---

**NOTE:** To create or change a routing strategy workflow, you must have Full or Modify access, respectively, for the associated Manager permission.

---

If you are configuring a voice routing strategy workflow, you must configure the .wav files that you want to use before you begin (see [Section 12.3.3, "Configuring a .wav file", on page 226](#)).

---

**NOTE:** You cannot create a routing strategy workflow diagram that connects back to itself. A routing strategy workflow diagram must end with a termination component.

---

## Working with workflows

### Configuring a routing strategy workflow

#### To configure a routing strategy workflow:

1. On the **File** menu, point to **New**, then **Design Center**, then select the media type, and then click **Routing Strategy Workflow**.
2. On the **General** tab, under **Workflow**, do the following:
  - In the **Name** box, type a unique name for the routing strategy workflow. The name appears on the tab in the Design Editor when you open the workflow diagram.
  - In the **Description** box, type a description for the routing strategy workflow. The description should include the purpose of the workflow.
3. To configure override settings for the workflow, click the **Override** tab, and then do the following:
  - For a voice routing strategy workflow, configure the Call Director override settings for the workflow, if required. See [Section 9.4.1, "Overriding the default Call Director settings", on page 173](#).
  - Configure the error queue override settings for the workflow, if required. See [Section 9.4.2, "Overriding the default error queue settings", on page 174](#).
4. Click the **Reports** tab.
5. Under **Include**, select the reports that you want to display data about this routing strategy workflow. The list only contains the reports you own, or reports that are owned by users you can monitor.
6. Click **OK**. The application saves the new workflow and gives it a status of **Incomplete**.
7. In the right pane, double-click the new workflow. A workflow diagram appears in the **Design Editor** with a **Start** component.
8. Create the components for the routing strategy workflow diagram, as required.
9. Add components to the workflow diagram.
10. Connect the components.
11. On the **File** menu, click **Save**.

## 9.4.1 Overriding the default Call Director settings

You configure the default Call Director settings in the Options dialog box (see [Section 12.4, "Configuring the Call Director options", on page 229](#)). When you configure a routing strategy workflow (see [Section 9.4, "Configuring a routing strategy workflow", on page 171](#)) or a queue processing workflow (see [Section 9.7, "Configuring a queue processing workflow", on page 179](#)), you can override the default settings.

Before you begin, the .wav files that you want to use must be configured and installed on the main server machine (see [Section 12.3.3, "Configuring a .wav file", on page 226](#)).

### To override the Call Director settings:

1. In the **Voice Routing Strategy** dialog box or **Voice Queue Processing** dialog box, click the **Override** tab.
2. Under **Override Call Director Settings**, do any or all of the following, if required:
  - To override the selected language for spoken messages, select the **Language** check box, then click **Standard** and select the language you want to use from the list. The list contains the languages supported by the voice processor.

---

**NOTE:** The **Custom locale ID** should be used only by your service representative. The use of a language other than one of those provided in the Standard list requires additional firmware for the voice processor.

---

- To override the .wav file that plays when an error occurs, select the **Error message file name** check box, and then select a different .wav file from the list.

---

**NOTE:** If you are connected to a production database, you can click  to play the .wav file. You cannot play .wav files when you are connected to a design database.

---

- To override the .wav file that plays if there is no caller response, select **No response file name** check box, and then select the .wav file from the list.

## Working with workflows

### About queue processing workflows

- To override the .wav file that plays if there is an invalid caller response, select the **Invalid response file name** check box, and then select the .wav file from the list.
- To override the queue that the call is forwarded to when the caller presses the Operator key, select the **Operator queue** check box, and then select a different voice queue from the list.
- To override the .wav file that plays when the caller is transferred to the operator, select the **Operator transfer file name** check box, and then select a different .wav file from the list.

3. If you are finished working with this workflow, click **OK**.

### 9.4.2 Overriding the default error queue settings

You configure the default error queue settings in the Options dialog box for each media type. When you configure a routing strategy workflow (see [Section 9.4, "Configuring a routing strategy workflow", on page 171](#)), you can override the default error queue settings.

#### To override the error queue settings:

1. In the **Routing Strategy** dialog box, click the **Override** tab.
2. Under **Override Error Queue**, do the following:
  - To override the queue where contacts are placed when an error is encountered in the routing strategy workflow, select the **Error queue** check box, and then select a different queue from the list.
  - To override the default description of the error queue, select the **Error Description** check box, and then type a different error queue description in the box.
3. If you are finished working with this workflow, click **OK**.

## 9.5 About queue processing workflows

A queue processing workflow determines what happens to a contact while it is waiting in queue. A queue processing workflow dictates:

- For calls, what a caller hears and what actions a caller can take.
- For e-mail messages, what automated actions are applied to the e-mail message, for example, auto-acknowledgments and auto-responses.

A queue processing workflow works in parallel with the system's attempts to route the contact and will affect the routing only if the workflow enqueues the contact to a different queue, transfers, discards, or disconnects the contact. When Call Director is enabled, a queue processing workflow can also be used to play messages for calls.

In general, in a queue processing workflow, you can perform any of the functions that you can use in a routing strategy workflow.

For each media type available in the contact center, OpenScape Contact Center provides a default queue processing workflow. You can make a copy of the default workflow and use it as the starting point for creating a new queue processing workflow, or you can create a new one.

## 9.6 Queue processing workflow considerations

The following topics introduce the most common uses and aspects of queue processing workflows, and explain the differences between queue processing workflows and routing strategy workflows.

### 9.6.1 Looping in a queue processing workflow

A workflow can contain loops: one or more components can be executed repeatedly. To create a loop, you create a link that runs back to a component that has already executed.

---

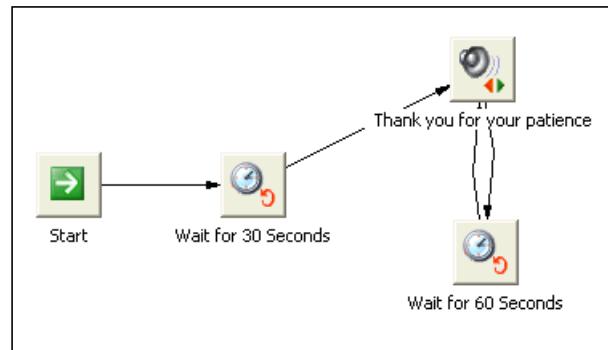
**NOTE:** Looping in routing strategy workflows is not recommended since it can lengthen the time required to enqueue, route, discard, or disconnect an incoming contact.

---

## Working with workflows

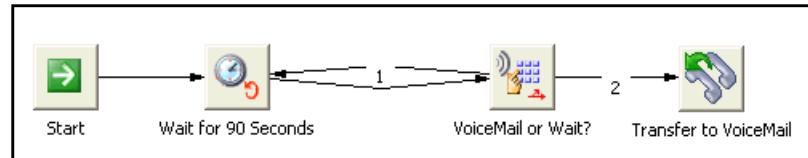
### Queue processing workflow considerations

In a simple voice scenario, a queue processing workflow could start with a 30 second wait, then enter a loop: play a message thanking the customer for their patience, wait 60 seconds then start the loop again.

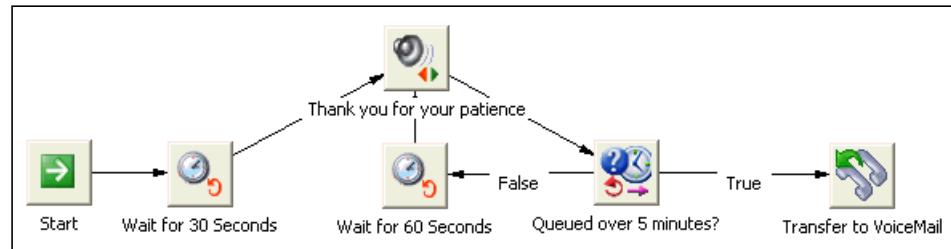


In this example, **Wait for 60 Seconds** and **Wait for 30 Seconds** are Wait Interval components. A Wait Interval component pauses for a specified period of time, before the next component in the sequence executes. During this time, a voice caller would experience default communication platform treatment, typically music-on-hold. Wait Interval components can be used only in queue processing workflows. They cannot be used in routing strategy workflows.

You might not want a loop to run indefinitely. If you are using Call Director, you could start a voice queue processing workflow with a 90 second wait interval and then use a Menu Prompt component to offer the choice to continue waiting or leave a voice mail message.



You can also perform a test while within the loop to see if a specified time has elapsed, or if the loop has executed a specified number of times. You can then exit the loop based on the results of the test. The following diagram shows a workflow that tests whether a call has been enqueued for five minutes and if so, transfers the caller to a voice mail pilot number.



**Queued over 5 minutes?** is a Workflow Decision component. Each time through the loop, the next component to execute after the Workflow Decision component will depend on whether the test yields a true or false result.

## 9.6.2 Exiting a queue processing workflow

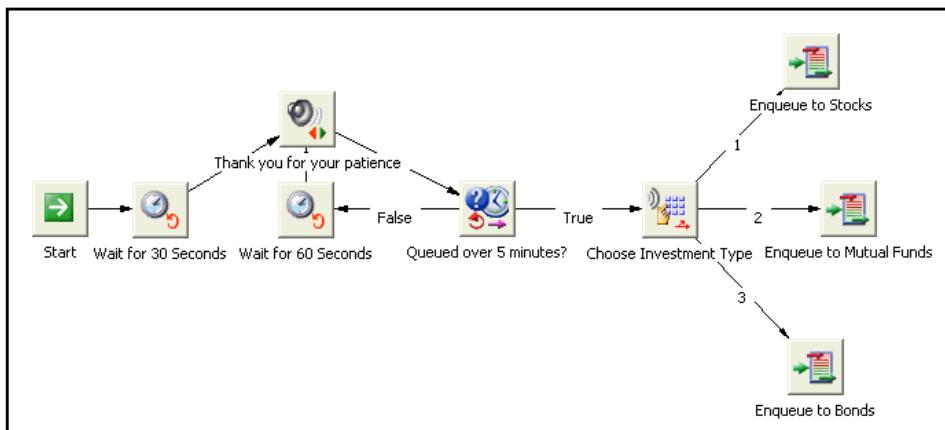
A queue processing workflow executes in parallel with the OpenScape Contact Center system's attempts to route the contact to a user. There are a number of ways that a queue processing workflow can terminate. The workflow will terminate when OpenScape Contact Center successfully routes the contact to a user based on the primary and overflow groups configured for the queue. The workflow can also include component types that terminate the workflow. Like a routing strategy workflow, a queue processing workflow can disconnect, discard, transfer, or enqueue the contact to a different queue.

---

**NOTE:** A voice queue processing workflow will terminate if the caller abandons the call.

---

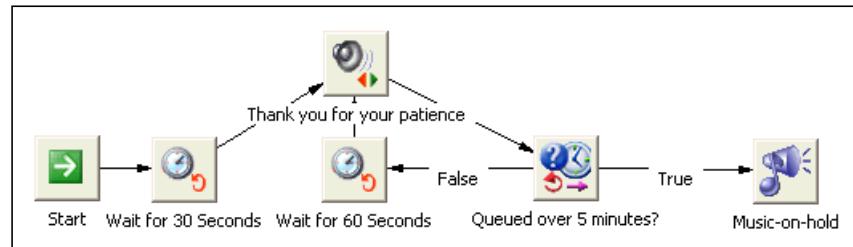
The following diagram shows an example of a voice queue processing workflow that lets a caller choose a different queue after a five-minute wait in queue.



## Working with workflows

### Queue processing workflow considerations

You can also terminate execution of a voice queue processing workflow by transferring the contact to default communication platform contact treatment, typically music-on-hold. For example, if a caller has been hearing a recorded message for a specified length of time, you may want to have the caller switched to music-on-hold.



In this example, **Music-on-hold** is a Default Treatment component. After a Default Treatment component executes, the queue will continue to attempt to find a user to handle the contact. The caller will experience default communication platform treatment until OpenScape Contact Center successfully routes the contact to a user or the caller abandons the contact.

---

**IMPORTANT:** Exercise caution when initially enqueueing a contact or requeueing a contact to a queue for which a queue processing workflow will be executed. Similarly, exercise caution when transferring a contact to a number that could result in a routing strategy workflow executing.

---

Always keep in mind that performance and customer satisfaction can be impacted by situations such as:

- A queue processing workflow requeueing a contact to the queue to which it is already assigned, resulting in the same workflow executing again.
- A queue processing workflow associated with Queue A requeueing a contact to Queue B, whose associated queue processing workflow requeues the contact back to Queue A.
- A routing strategy workflow transferring a contact to the main OpenScape Contact Center pilot number, resulting in the same workflow executing repeatedly.

## 9.7 Configuring a queue processing workflow

A queue processing workflow determines what happens to a contact while it is waiting in queue. For more information, see [Section 9.5, "About queue processing workflows", on page 174](#).

---

**NOTE:** To create or change a queue processing workflow, you must have Full or Modify access, respectively, for the associated Manager permission.

---

If you are configuring a voice queue processing workflow, you must configure the .wav files that you want to use in the workflow before you begin (see [Section 12.3.3, "Configuring a .wav file", on page 226](#)).

You can create a looping queue processing workflow where a particular component is repeated until the contact is handled by a user. Use a Workflow Decision component to set a condition for the repeated components. For details, see [Section 9.6.1, "Looping in a queue processing workflow", on page 175](#).

**To create a queue processing workflow:**

1. On the **File** menu, point to **New**, then **Design Center**, then select the media type, and then click **Queue Processing Workflow**.
2. Under **Workflow**, do the following:
  - In the **Name** box, type a unique name for the queue processing workflow. The name appears on the tab in the Design Editor when you open the workflow diagram.
  - In the **Description** box, type a description for the queue processing workflow. The description should include the purpose of the workflow.
3. For a voice queue processing workflow only, click the **Override** tab and configure the Call Director override settings for the workflow, if required. See [Section 9.4.1, "Overriding the default Call Director settings", on page 173](#).
4. Click **OK**. The application saves the new workflow and gives it a status of **Incomplete**.
5. In the right pane, double-click the new workflow. A workflow diagram appears in the **Design Editor** with a **Start** component.
6. Create the components for the queue processing workflow, as required.
7. Add components to the workflow diagram.

## Working with workflows

### Linking workflows

8. Connect the components.
9. On the **File** menu, click **Save**.

## 9.8 Linking workflows

Within a workflow, you can use a Link component to pass execution to another workflow. There are two ways that this can be useful:

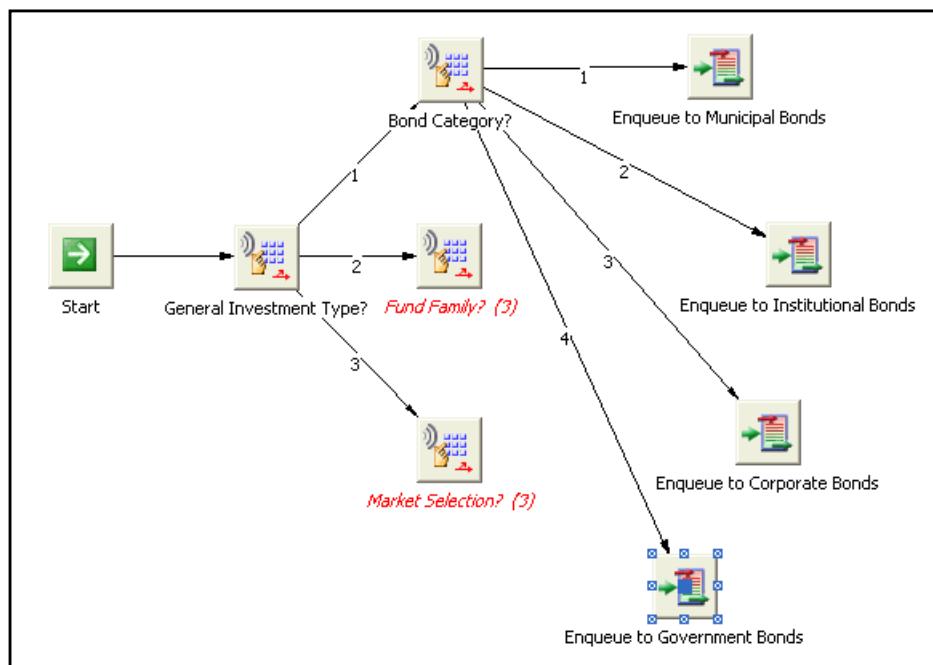
- You can break your workflows into manageable pieces, creating a hierarchy with a main workflow that calls one or more other workflows.
- You can eliminate redundant functionality by creating a single subflow that is linked to, from a number of locations.

There is no practical limit on the level of linking you can use. A workflow called by another workflow can in turn, call a third workflow, and so on. However, the set of workflows must terminate with a valid End component.

Lastly, you can link only to a workflow of the same type. For example, a routing strategy workflow can link only to another routing strategy workflow; it cannot link to a queue processing workflow.

## 9.8.1 Simplifying workflows

The following diagram shows a partially complete voice routing strategy workflow. This work-in-progress is a candidate for a workflow that should be broken into a number of smaller pieces.

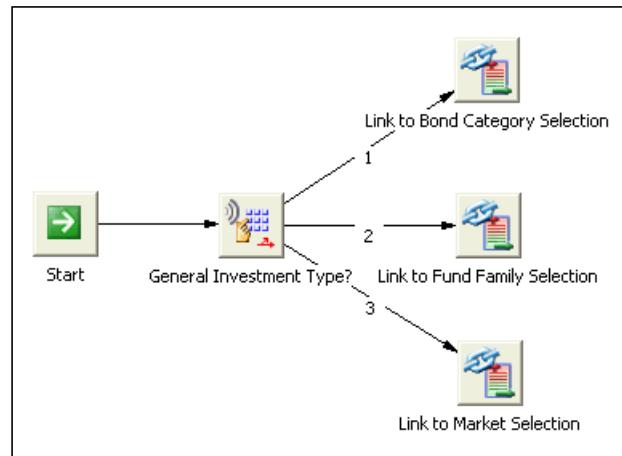


The first menu prompt asks the user to choose a general investment service. A second menu prompt then asks the user to make a more specific choice. If the caller first chooses bonds, the caller is then asked to choose from a bond category (municipal, institutional, corporate, or government bonds). Similarly, if the caller initially chooses mutual funds, the caller might then be asked to choose a specific fund family (money market, growth, balanced, or specialty). On completion, this workflow would be cluttered, making it difficult to maintain. This and other complex workflow situations can be helped through the use of linking.

## Working with workflows

### Linking workflows

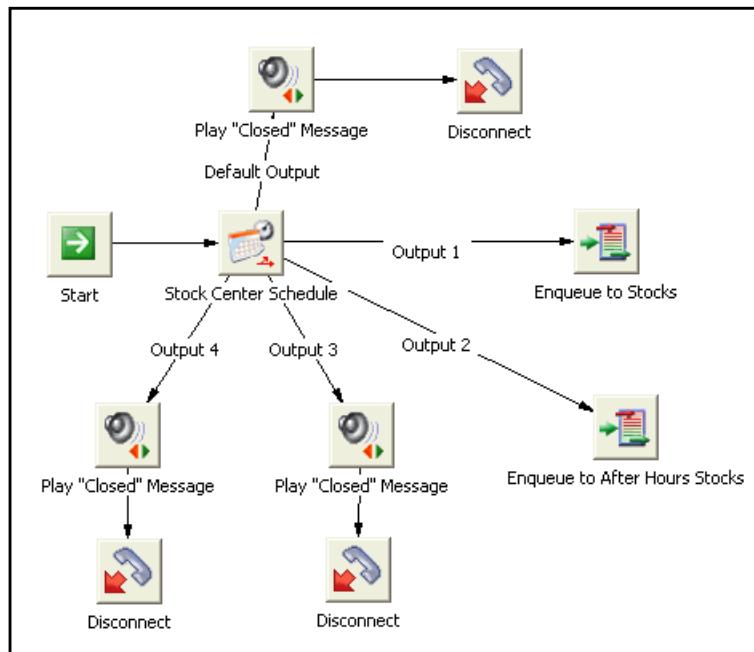
You could create a separate workflow for each branch that occurs after the user chooses their basic investment service. You can then modify the workflow shown above to link to the three new workflows.



**Link to Bond Selection, Link to Fund Family Selection, and Link to Market Selection** are Link to Routing Strategy components. Link to Routing Strategy components exit the current workflow and pass execution to another routing strategy workflow.

## 9.8.2 Eliminating redundant functionality

Linking is also useful if you have identical functionality used in several workflows or used in several branches of the same workflow. To take a simple example, three of the schedule results in the following workflow have identical subsequent processing: play a message and then disconnect.



You could create a new workflow that contains the play message and disconnect functionality and then modify the original workflow to link to the new workflow after the three relevant schedule choices.

## 9.9 Activating a workflow

While you can create several workflows for a given media, only one workflow per media can be active at an OpenScape Contact Center site.

The default routing strategy workflow is specified in the Options dialog box. For details, see the following topics:

- [Section 11.5.1, "Configuring the default voice routing strategy, queue, and time-out extension", on page 220](#)
- [Section 14.3.1, "Configuring the default e-mail routing strategy, queue, and addresses", on page 254](#)

The default queue processing workflow is specified in the queue definition. For details, see [Section 10.3.1, "Configuring the general queue information", on page 203](#).

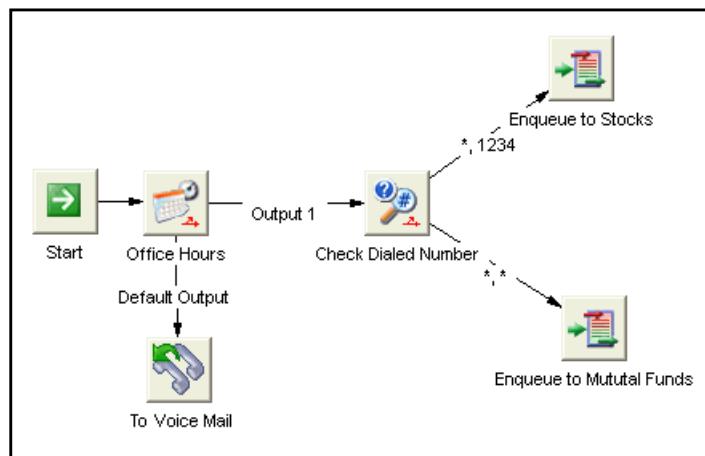
## Working with workflows

An exercise in creating a workflow

### 9.10 An exercise in creating a workflow

The following sections make up an exercise you can walk through to get familiar with creating workflows. This is intended for practise purposes only, and the resulting workflow should not be used.

You will create the following voice routing strategy workflow:



This workflow executes as follows:

1. If a contact arrives outside normal business hours, it is routed to voice mail.
2. If the contact arrives within normal business hours:
  - If the contact comes in on the dialed number associated with stocks inquiries, it is routed to a Stocks queue to wait for a user to handle the contact.
  - Otherwise, it is routed to the Mutual Funds queue.

#### 9.10.1 Creating the routing strategy workflow

The first step in setting up a working a workflow is to create the workflow and define its properties.

**To create a routing strategy workflow:**

1. In the **Design Center**, click the  Voice tab.
2. Under **Designs**, click **Routing Strategy Workflows** to display the existing voice routing strategy workflows.
3. On the **File** menu, point to **New**, then **Design Center**, then **Voice**, and then click **Routing Strategy Workflow**.
4. In the **Name** box, type **Small Branch Contacts**.
5. In the **Description** box, type a description for the workflow.

---

**NOTE:** The **Override** tab can be used to override certain default settings. For the purpose of this exercise, you can ignore the overrides.

---

6. Click **OK**. The new routing strategy workflow is added to the list.

## **9.10.2 Accessing the Design Editor**

OpenScape Contact Center has an editor dedicated to creating and maintaining routing strategy workflows and queue processing workflows.

**To open the Design Editor:**

- Double-click the routing strategy workflow you just created. The Design Editor opens your routing strategy workflow. It has a single component, **Start**, which indicates the start of processing for an incoming contact.

## **9.10.3 Adding a Schedule component**

The first step in processing a contact is to verify that the contact arrived during working hours. A Schedule component uses the current date and time to determine how to handle the contact. While there are a variety of options in creating Schedule components, this one will simply test whether a contact has arrived between the hours of 9 A.M. and 5 P.M., Monday through Friday.

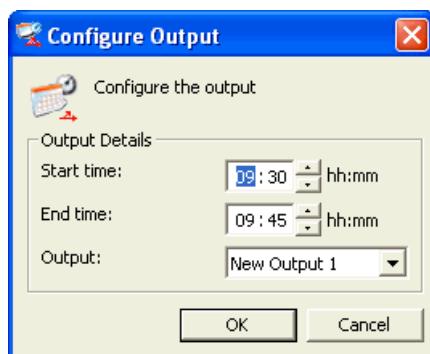
**To add a Schedule component:**

1. In the **Design Editor**, under **Components**, expand the **Decision** folder, and then expand the **Schedules** folder.
2. On the **File** menu, point to **New Component**, then **Decision**, and then click **Schedules**.

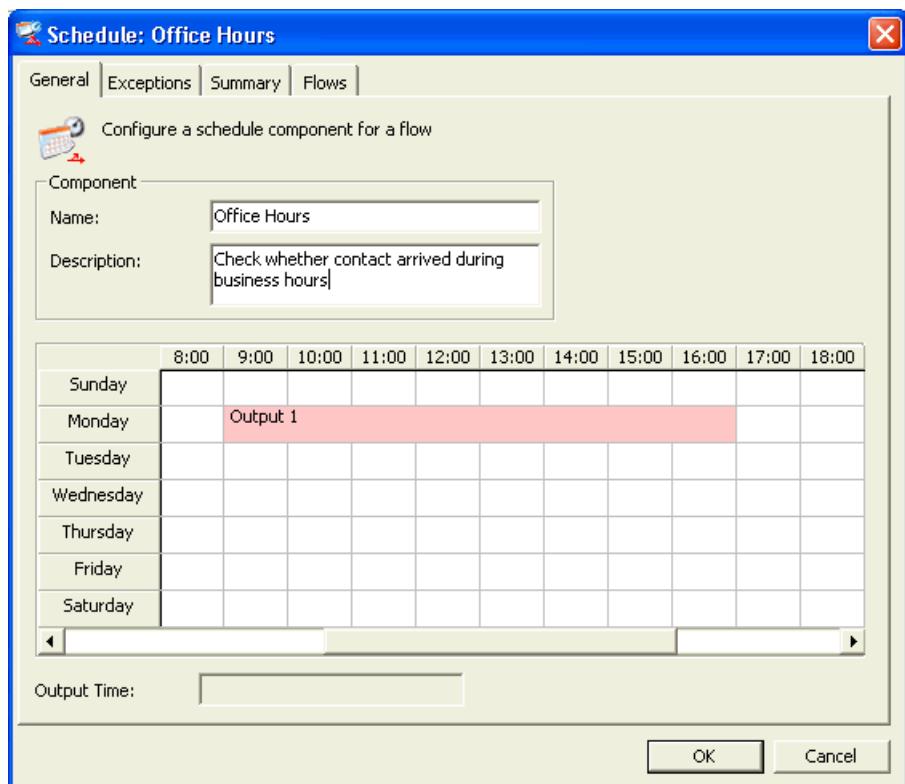
## Working with workflows

An exercise in creating a workflow

3. In the **Name** box, type **Office Hours**. The component name must be unique.
4. In the **Description** box, type a description for the component.
5. In the calendar grid, double-click the Monday/9:00 cell.



6. In the **Configure Output** dialog box, do the following:
  - In the **Start time box**, type or select **9:00**.
  - In the **End time box**, type or select **17:00**.
  - Click **OK**.



7. Right-click the area you just defined, point to **Copy**, and then click **Tuesday**.
8. Repeat step 7 for **Wednesday**, **Thursday**, and **Friday**.
9. Click **OK**. The new component is added under **Schedules**.
10. Drag the new component to a location about one inch to the right of the **Start** component and horizontally aligned with the **Start** component.

---

**NOTE:** When you add a component to a workflow, the label includes a number in brackets. This is the number of connections to other components that this component will need. You will connect components in a later step.

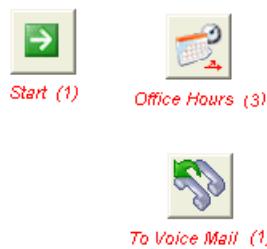
---

#### 9.10.4 Adding a Transfer component

For this scenario, when a contact arrives outside normal hours, it should be forwarded to a voice mail extension so that the caller can leave a message. A Transfer component can perform this action.

**To add a Transfer component:**

1. In the **Design Editor**, right-click below the **Office Hours** component, point to **Add New Component**, then **Routing**, and then click **Transfer**. A **Voice Transfer** dialog box appears.
2. In the **Name** box, type **To Voice Mail**.
3. In the **Description** box, type a description for the component.
4. In the **Transfer** box, type an arbitrary extension number, such as **1111**. For this exercise, assume that this is a valid voice mail extension.
5. Click **OK**. Your workflow should now look like this:



## Working with workflows

An exercise in creating a workflow

### 9.10.5 Adding a Source/Destination Decision component

For this scenario, there are two dialed numbers, one intended for queries on stocks and the other intended for queries on mutual funds. If a contact arrives during normal business hours, you should direct the contact to a Stocks queue or Mutual Funds queue based on the dialed number.

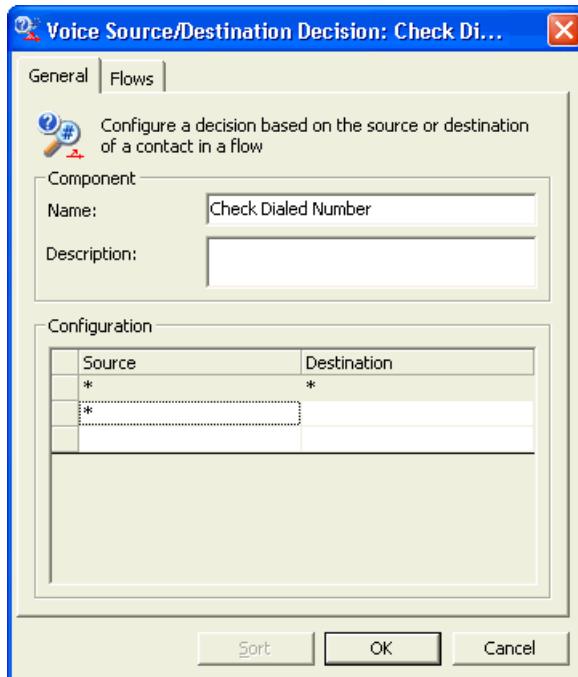
You can check for the dialed number using a Source/Destination Decision component. In this case you will be interested in the destination only.

#### To add a Source/Destination Decision component:

1. Right-click to the right of the **Office Hours** component, point to **Add New Component**, then **Decision**, and then click **Source/Destination Decisions**.
2. In the **Name** box, type **Check Dialed Number**.
3. In the **Description** box, type a description for the component.

4. Under **Configuration**, add the source and destination pairs as follows:

- A default source/destination pair **(\*/\*)** is provided in the table.
- In the **Source** column, below the default pair, type an asterisk (\*) to indicate any combination of numbers. See the *Manager Help* for more information about using asterisks in the source and destination numbers, and the order of consideration for source and destination numbers.



- In the **Destination** column, type **1234**. For now you can assume that 1234 is associated with the dialed number for stocks inquiries. Since there are only two dialed numbers associated with this contact center, you need to perform a single test only. If the test for 1234 passes, you can enqueue to the Stocks queue. If the test fails, you can enqueue the contact to the Mutual Funds queue.

5. Click **OK**.

## 9.10.6 Connecting the components

While additional components will be added to this workflow, you now have enough components to begin linking components. This will dictate the order in which the components execute. A component has at least one input connection, and has none, one, or more output connections.

## Working with workflows

An exercise in creating a workflow

### To create a line that connects two components:

1. Select the **Start** component.



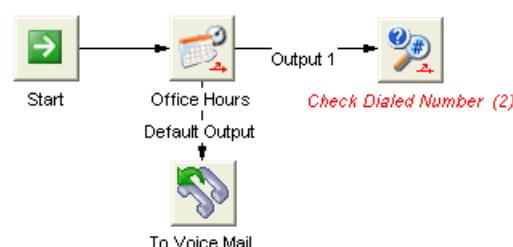
2. To create the first link, click the center of the **Start** component (indicated by a small square) and drag a link to the **Office Hours** component. Note that in the **Start** component label, the required links indicator **(1)** is no longer showing. Likewise, the required links indicator for the **Office Hours** component has dropped from **3** to **2**, indicating that two links are still required before that component is fully configured.



3. Select the **Office Hours** component. In Abschnitt 9.10.3 auf Seite 9-185, you created a subset of the calendar for Monday through Friday between the hours of 9:00 and 17:00. That subset was labeled **Output 1**. The two remaining links from the **Office Hours** component will be:

- **Output1** corresponding to the subset of the calendar you created.
- **Default** corresponding to all other times and days.

4. Click the center square of the **Office Hours** component, and drag a link to the **To Voice Mail** component.
5. Again, select the **Office Hours** component. Click the center square of the **Office Hours** component, and drag a link to the **Check Dialed Number** component. This is as far as you can proceed with linking components for now. Your workflow should look like this:



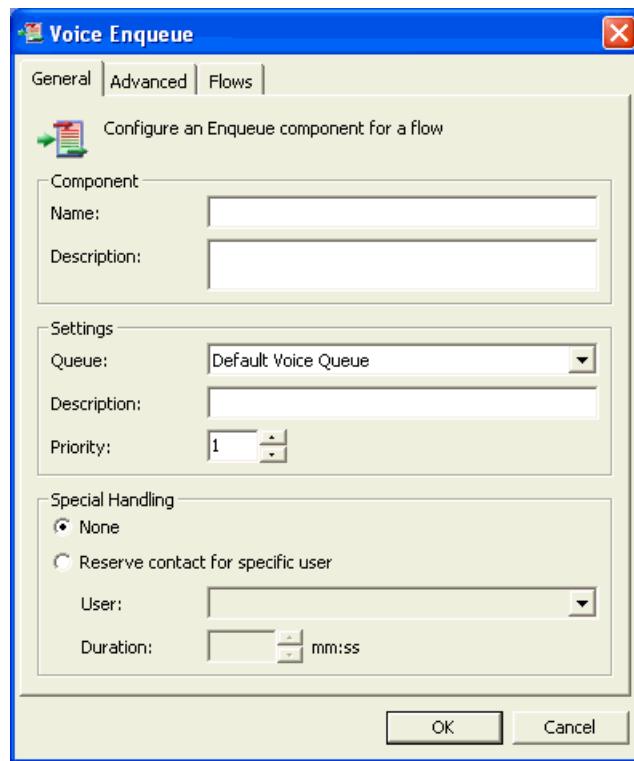
The remaining tasks are to create and link the components that determine the next action taken based on the results of the test performed by the **Check Dialed Number** component.

## 9.10.7 Adding the Enqueue components

An Enqueue component routes a contact to a queue where it will wait for an eligible user to become available to handle the contact. The queue is configured to maximize the chances of the contact being handled by a user highly qualified in the area of expertise for which this queue was set up.

### To add the Enqueue components:

1. Right-click above and to the right of the **Check Dialed Number** component, point to **Add New Component**, then **Routing**, and then click **Enqueue**.



2. In the **Name** box, type **Enqueue to Stocks**.
3. In the **Description** box, type a description for the component.
4. In the **Queue** box, select any available queue. If you were creating a working workflow, you would have a Stocks queue defined. Since this is just a practice session, you can pick any defined queue to complete the Enqueue component definition.
5. Click **OK**.
6. Right-click the new **Enqueue to Stocks** component and select **Create Copy**. A new Enqueue component definition opens, with the same values as the **Enqueue to Stocks** component.

## Working with workflows

### Other component type functions

7. Change the value in the **Name** box to **Enqueue to Mutual Funds**.
8. Click **OK**.
9. Drag the new Enqueue component so that it is below and to the right of the **Check Dialed Number** component.
10. Using the principles you learned in Abschnitt 9.10.6 auf Seite 9-189, do the following:
  - Create a link from the **Check Dialed Number** component to the **Enqueue to Mutual Funds** component.
  - Create a link from the **Check Dialed Number** component to the **Enqueue to Stocks** component.
11. On the **File** menu, click **Save** to save the workflow.
12. On the **File** menu, click **Close** to close the Design Editor.

## 9.11 Other component type functions

In this chapter, you have received an introduction to some of the component types you can use in work flows. There are many other component types you can use. For details on these component types, see the *Manager Help*.

# 10 Working with queues and aggregates

This chapter provides information on working with queues. It provides conceptual information on how queues operate, information on how to develop a queue setup strategy, and details on how to work with queue definitions.

## 10.1 About queues

A queue is a logical holding area for contacts waiting to be routed to a specific user. While a contact is in queue, OpenScape Contact Center executes a number of steps to try to match the contact to a specific user. For details, see [Section 8.1, "About group-based routing", on page 139](#).

---

**NOTE:** For an introduction to queue processing, see [Section 2.1.3, "Queue processing", on page 13](#).

---

## 10.2 Queue setup considerations

An OpenScape Contact Center configuration should show a strong correlation between the queues you set up and the groups you have designated as the first-line choices in answering contacts.

Working backwards, there is an implied reliance on the information you collect and the decisions you make in your routing strategy workflow. Your setup will dictate who will answer the contact, how long the caller will wait, and the options a caller has while waiting.

The remaining topics in this section discuss aspects you should consider when setting up queues.

---

**NOTE:** When planning your queue setup, you should also consider the group setup. For details, see [Section 8.1, "About group-based routing", on page 139](#).

---

#### 10.2.1 Initial contact processing

A routing strategy workflow collects information on a contact and based on that information, makes a decision as to how that contact is to be routed. Initial processing of contacts arriving in the contact center should have a strong influence in your queue setup. During initial setup or planned reconfiguration, queue setup and routing strategy workflow planning should be considered simultaneously.

For example, consider a voice media in which you may have several logical candidates for areas of specialization, but are servicing only a single, dialed number. In that case, you could not route calls to a queue using a method as simple as use of a Source/Destination Decision workflow component in a routing strategy workflow. If, in addition, you are not using Call Director or an IVR, it would be difficult to have a contact routed to one of several specialized queues without operator intervention.

If you have already made decisions that influence initial processing of contacts arriving in your contact center, your queue setup should be made within the constraints of those decisions.

#### 10.2.2 Scheduling

When planning your queue setup, you need to consider any differences in routing required to accommodate the schedules you are working with. [Section 9.3.3, "Scheduling information", on page 152](#), introduces OpenScape Contact Center schedules.

Under some circumstances, schedules will have no effect on your queue setup, for example, you may have the same number and types of users working for all shifts. For more information on shifts, see [Section 15.7.5, "Configuring the shifts", on page 295](#).

However, you may require different routing during evening coverage. For example, with a smaller contact volume after normal business hours, you may have a smaller staff working. Instead of three dedicated queues for Stocks, Mutual Funds, and Bonds, a single After Hours Investments queue and a staff with more generalized skills may provide more efficient contact handling.

### 10.2.3 Overflow and specialization overlap

After initial processing by a routing strategy workflow, if a contact is not disconnected or transferred to a specific extension, it will be held in a queue as the next step in processing the contact.

Since a queue will first try to route a contact to users in its primary group and later try users in overflow groups, if there is an overlap in the knowledge, specialization, or responsibility across groups, you can use this to influence your queue/group setup. In this sense, you can think of a queue as a prioritized list of groups.

For example, assume that your contact center specializes in sales of sporting footwear. You may have specialists in the following areas:

- Skates
- Skis
- Hiking boots
- Tennis shoes
- Running shoes
- Walking shoes

In such a case, there would probably be some overlap in the knowledge of all the users involved with winter sporting footwear. Likewise, there would probably be overlap in the knowledge in those users selling summer footwear.

You might have a separate destination number for each service or product, or use an IVR to prompt the user for their choice and direct the contact accordingly. Barring other considerations, the queue/group setup could be identical to that shown in the following table.

Queue	Primary Group	Overflow Groups
Skates	Skates	Skis, Hiking boots
Skis	Skis	Skates, Hiking boots
Hiking boots	Hiking Boots	Skis, Skates
Tennis shoes	Tennis shoes	Running shoes, Walking shoes
Running shoes	Running shoes	Tennis shoes, Walking shoes
Walking shoes	Walking shoes	Tennis shoes, Running shoes

Table 4

A sample queue/group setup

## Working with queues and aggregates

### Queue setup considerations

#### 10.2.4 Staffing, contact volume, and queue time

A key factor in finalizing your queue setup is to verify that the staffing capacity meets or exceeds contact volume. In general, when staffing capacity meets or exceeds contact volume, caller wait time is minimal.

The example used in the table in [Section 10.2.3, "Overflow and specialization overlap", on page 195](#), is a situation that may be efficient given the following sample assumptions and statistics:

- **Contact volume** – Contacts relating to sporting footwear average 350 per hour.
- **Contact distribution** – Incoming contacts are evenly distributed across the six areas of expertise.
- **Group staffing** – Each of the six specializations has 10 ten specialists, giving a total of 60 users.
- **Contact handling time** – It takes a user about seven minutes to handle a contact, and an additional three minutes to do wrap-up work, giving a total of 10 minutes per contact.

Since a user can handle six contacts per hour, and there are 60 users, the expected contact handling capacity for this queue setup is 360 contacts per hour. Since the staffing level (360 calls per hour) exceeds the expected contact volume (350 calls per hour), barring other considerations, this configuration might be efficient.

Stated from a slightly different perspective:

- With just under 60 skis-related contacts arriving per hour, on average a contact will arrive once per minute.
- An individual user can handle six contacts per hour and can therefore be expected to become available every 10 minutes (600 seconds). With a pool of 10 experts in any one area of specialization, a user can be expected to become available once per minute.

With one contact arriving per minute and one user becoming available per minute, caller wait time is effectively zero. This implies that for any queue, the vast majority of contacts will be handled by a user who is a specialist in the area associated with the queue. Contacts directed to a particular area of specialization are almost always handled by a specialist in that area.

There are situations, however, where you may want to go to a less specialized or more backup-oriented queue setup.

### 10.2.4.1 Selecting a more backup-oriented queue setup

A backup-oriented queue setup still relies on specialists but also relies on users with general skills in more than one area of specialty.

The following table shows an example of a queue setup that is more backup-oriented than that shown in [Section 10.2.3, "Overflow and specialization overlap", on page 195](#).

Queue	Primary Group	Overflow Groups
Skates	Skates	Sporting Footwear Backup
Skis	Skis	Sporting Footwear Backup
Hiking boots	Hiking Boots	Sporting Footwear Backup
Tennis shoes	Tennis shoes	Sporting Footwear Backup
Running shoes	Running shoes	Sporting Footwear Backup
Walking shoes	Walking shoes	Sporting Footwear Backup

Table 5 A backup-oriented queue setup

You may prefer this type of queue/group setup if any of the following conditions apply:

- There is insufficient overlap of knowledge or responsibilities across the areas of specialization. Skate specialists, for example, are not qualified to handle contacts in other areas.
- There are not enough specialists available to handle the contact volume. This may be a temporary situation. For example, if staffing in a particular specialty is geared toward contact volume outside peak hours, staffing in that specialization would not be able to handle peak hour traffic.
- A low contact volume/staffing requirement in combination with lengthy contact handling and wrap-up times can increase actual queue time for individual contacts. For example, if you have two specialists in a particular area, handling and wrap-up time is 30 minutes per contact, and average contact volume is four contacts per hour, then on average that staffing level meets the expected contact volume. However, for contacts arriving when the two users are handling contacts, queue time can be lengthy.

## Working with queues and aggregates

### Queue setup considerations

#### 10.2.4.2 Selecting a less specialized queue setup

The following table shows an example of a queue setup that is less specialized than that shown in [Section 10.2.3, "Overflow and specialization overlap", on page 195](#).

Queue	Primary Group	Overflow Groups
Summer Sporting Footwear	Summer Sporting Footwear	Sporting Footwear Backup
Winter Sporting Footwear	Winter Sporting Footwear	Sporting Footwear Backup

*Table 6 A less specialized queue setup*

There are a number of reasons you may choose a less specialized queue setup, for example:

- You cannot easily route to a large set of specializations due to initial contact processing constraints. For example, in a voice media scenario, if you are supporting fewer dialed numbers than specialization area candidates, or if you are not using Call Director or an IVR to prompt customers for information used to route the contact, you may be obliged to use a less-specialized queue setup. For more information, see [Section 10.2.1, "Initial contact processing", on page 194](#).
- Contact volume in particular areas of specialization may not justify specific queues and groups set up to handle those areas of specialization. For example, low contact traffic in an area of specialization might result in an unacceptably high percentage of idle time for users in that specialization.
- Contact volume in general may not warrant specialization. For example, assuming that wait time is zero when one contact arrives per minute and one user becomes available per minute is valid only with a statistically significant sample size of users and arriving contacts.

---

**NOTE:** These considerations are also influenced by the service level intervals you set up for each queue. For more information, see [Section 10.2.5, "Step intervals", on page 199](#).

---

In most cases, administrators will return to their original configuration to perform fine tuning. You can use the Manager application's reporting feature to inspect historical performance statistics and to monitor resources in real time. For more information, see [Section , "Reporting"](#).

## 10.2.5 Step intervals

One important aspect to consider when configuring step intervals is the maximum amount of time that you want contacts to spend in queue, called the service level. You can define a service level for the system in general or at the level of individual queues. Certain reports can be used to evaluate how well the contact center adheres to this target. If a queue is not adhering to the target, you can modify the step intervals in that queue. You should also consider balancing the queue time with the importance of matching the contact to the appropriate group of users.

There is no specific formula for calculating ideal overflow group intervals. However, you can compare strategies used in two situations to come up with a strategy for your contact center:

- Overflow group intervals for a smaller contact center with less specialized groups.
- Overflow group intervals for a larger contact center with more specialized groups.

In a smaller contact center, while you may have dedicated experts in particular product areas such as skis, skates, and hiking boots, factors such as wait time, staffing and contact volume may dictate a less specialized queue setup. The following table shows an example.

Queue	Primary	Overflow	Time-out
Summer Sporting Footwear	Summer Sporting Footwear (9 users)	Sporting Footwear Backup (20 users)	Voice mail, 300 seconds
Winter Sporting Footwear	Winter Sporting Footwear (9 users)	Sporting Footwear Backup (20 users)	Voice mail, 300 seconds

Table 7

A less specialized queue setup example

With a single overflow group for the queue, only one overflow group interval has to be provided. In a voice media scenario for example, if your target maximum queue time is 60 seconds, you could simply wait until the queue time approaches the target maximum queue time before allowing a contact to overflow. For example, based on the group sizes shown in the table, you could specify an overflow interval of 50 seconds for the Winter Sporting Footwear queue. For contacts arriving in that queue, OpenScape Contact Center would attempt to route that contact to one of the nine users in the Winter Sporting Footwear group. After 50 seconds the contact would overflow to the Sporting Footwear Backup group, adding a pool of 20 eligible users. In most cases, this would virtually ensure that a contact is answered within the target maximum queue time of 60 seconds.

## Working with queues and aggregates

### Configuring a queue

In a contact center with a more specialized queue/group setup, if knowledge, specialization, or responsibilities overlap among your groups, you have additional options. Consider the following queue/group setup.

Queue	Primary Group	Overflow Groups	Time-out
Skis	Skis (10 users)	Skates (10 users) Hiking boots (10 users)	Voice mail, 300 seconds
Skates	Skates	Skis, Hiking boots	Voice mail, 300 seconds
Hiking boots	Hiking boots	Skis, Skates	Voice mail, 300 seconds

Table 8 A more specialized queue setup example

In this case, you may want to rank the suitability of users to handle skis-related contacts as follows:

- Skis group – perfect match
- Skates group – good match
- Hiking boots group – acceptable match

As opposed to considering only the target maximum queue time, this queue/group setup lets you balance queue time with the suitability of the match to answer the contact. For example, while your target maximum queue time may be 60 seconds, you may decide that after 30 seconds, contacts to the Skis queue can overflow to the Skates group since a good match to the contact outweighs the probability of spending more time in queue. This would double the pool of eligible users from 10 to 20 after 30 seconds. Similarly, after 45 seconds you may want to overflow to the Hiking boots group, to bring the total number of eligible users to 30. Keep in mind that overflowing to a group that is another queue's primary group can impact the service level for the second queue.

## 10.3 Configuring a queue

You can configure a queue for each media type available in your contact center. There are various items that you should consider when deciding how to configure a queue. For details, see the *Manager Administration Guide*.

---

**NOTE:** To create or change a queue, you must have Full or Modify access, respectively, for the associated Manager permission.

---

## Overview

The following is an overview of the steps required to configure all the properties in a queue:

1. Configure the general queue information – see [Section 10.3.1, "Configuring the general queue information", on page 203](#).
2. Configure the queue steps – see [Section 10.3.2, "Configuring the queue steps", on page 204](#).
3. Configure the queue overrides – see [Section 10.3.3, "Configuring the queue overrides", on page 206](#).
4. Select the queue Wrap-up reasons – see [Section 10.3.7, "Selecting the queue Wrap-up reasons", on page 216](#).
5. Select the queue aggregates – see [Section 10.3.8, "Selecting the queue aggregates", on page 216](#).
6. Select the queue reports – see [Section 10.3.9, "Selecting the queue reports", on page 217](#).

### 10.3.1 Configuring the general queue information

You can specify general information about the queue such as the name, description, and queue processing workflow to be used. You must complete this step when configuring a new queue.

#### To configure the general voice queue information:

1. On the **File** menu, point to **New**, then **Design Center**, then select the required media type, and then click **Queue**.
2. On the **General** tab, under **Queue**, do the following:
  - In the **Name** box, type a unique name for the queue.
  - In the **Description** box, type a description for the queue. The description should indicate the type of contacts for which this queue should be used.
3. For all queues except callback queues, under **Queue Processing**, in the **Workflow** list, select a queue processing workflow (see [Section 9.5, "About queue processing workflows", on page 174](#)). If you do not select a queue processing workflow, only the routing strategy workflow will be used to route contacts. You can select the default queue processing workflow, or you can create a queue processing workflow and assign it to this queue.

## Working with queues and aggregates

### Configuring a queue

4. Under **Supplemental Information**, in the **Address** box, type the location of the document that you want to be displayed on the user's machine when the contact is directed from the queue to the user. You can click  to locate the document. For more information, see [Section 10.3.1.1, "About the supplemental information feature", on page 205](#).
5. For a voice queue, you can have the system create a callback when a call is abandoned (available only if the contact center is licensed for callbacks). Under **Callback Creation**, select the **Create callback on call abandon** check box and then select the callback queue from the **Queue** list.

---

**NOTE:** If the **Create callback on call abandon** option is enabled for a queue and a call in the associated queue is abandoned by a caller, the system checks the callback schedule to verify that a callback can be handled within the next 24 hours. If a callback is created, it remains active for 24 hours after the call was abandoned and is then deleted by the system.

---

6. If you are finished working with this queue definition, click **OK**.

### 10.3.1.1 About the supplemental information feature

You can configure a queue (see [Section 10.3, “Configuring a queue”, on page 202](#)) so that when a contact is directed from that queue to a user, a document specified by a supplemental information address opens on the user’s computer. The address can be any document specifier for which the Windows operating system on the client machine recognizes as having a default, associated application.

Examples of how you might use this feature are:

- Opening a spreadsheet of prices or useful support information for products associated with the queue.
- Opening a browser on a telephone directory-based Web site that displays the customer name and address, based on the source associated with the contact.
- Displaying the history of a contact by issuing a customer database query using information identifying the customer, collected during execution of a routing strategy workflow.

---

**NOTE:** In Agent Portal Web, due to Web browsers security restrictions, the supplemental information feature is limited (for example, files cannot be opened or executed in the local machine when configured in the supplemental information field).

---

The supplemental information address can include one or more variables that will be substituted with contact data, the contact source, or the contact destination, when the contact is enqueued. This allows you to configure the address to open documents specifically pertaining to the customer or nature of the contact. Valid variables you can include in the supplemental information address are listed in the following table.

Variable	Description
<b>~CDK~</b>	Where <b>CDK</b> is the key component of a contact data key/value pair created during execution of the routing strategy workflow. When the contact is enqueued, the variable will be substituted with the value component of the key/value pair.
<b>~SOURCE~</b>	When the contact is enqueued, the variable will be substituted with the source associated with the contact.
<b>~DESTINATION~</b>	When the contact is enqueued, the variable will be substituted with the destination associated with the contact.

Table 9

Supplemental information address variables

## Working with queues and aggregates

### Configuring a queue

Variable	Description
<b>~CONTACTID~</b>	When the contact is enqueued, the variable will be substituted with the identifier, generated by OpenScape Contact Center, that uniquely identifies the contact.

Table 9 *Supplemental information address variables*

Any contact data that is to be used as a variable in a supplemental information address must be set in the active routing strategy for the site. For example, consider a Web-enabled customer database system in which users can view key customer record data and contact history, given an account number in a browser. On incoming contacts, a voice routing strategy workflow could prompt a customer for their account number and then store the results as a contact data value associated with the contact data key **ACCT\_NUM**.



To make use of that information, the definition of the queue to which the contact is directed includes a supplemental information address of the relevant URL, including the **ACCT\_NUM** contact data key.

`http://www.cust.com/accountinfo?account=~ACCT_NUM~`

If the customer enters 123456 as their account number, the supplemental information address resolves to:

`http://www.cust.com/accountinfo?account=123456`

### 10.3.2 Configuring the queue steps

Queues define the steps that a contact moves through. You can configure steps for one primary group and a maximum of 10 overflow groups. The primary group is defined as the first group of users to which the incoming contact is queued. It should be the group of users who are most familiar with the requirements of the contact. An overflow group is an additional group to which the contact is also assigned when the previous step time expires. By adding overflow groups to the queue, more users become eligible to handle the contact as it waits in queue.

You can add each group only once to a queue. For more information on groups, see [Section 8.1, "About group-based routing", on page 139](#).

**To configure the queue steps:**

1. In the **Design Center**, click the tab for the media type you want to open.
2. Under **Resources**, click **Queues**, then, in the right pane, double-click the queue you want to configure.
3. Click the **Steps** tab.
4. Under **Sequence**, do the following:
  - a) In the **Primary** row under **Group**, click the cell and select a primary group from the list. When you select a primary group, a new overflow row is added to the table.
  - b) In the **Primary** row under **Step Time**, double-click the cell and type a time for the contact to wait in queue for a user in the primary group to handle the contact.
  - c) In the **Overflow** row under **Group**, click the cell and select an overflow group name from the list. When you select an overflow group, a new overflow row is added to the table.
  - d) In the first **Overflow** row under **Step Time**, double-click the cell and type a time for the contact to wait in queue while assigned to this step.
  - e) Repeat steps (c) and (d) for each overflow group you want to create. You can configure a maximum of 10 overflow groups.

---

**NOTE:** For voice queues, if there are no logged-on users in the current step, the step will be skipped and queue step execution will proceed to the next step that has logged-on users. Since the overflow mechanism is additive, the pool of users in the current step includes all the users from the overflow group specified in the current step, plus all the users from the groups specified in the previous steps. For callback and e-mail queues, contacts always wait for the specified step time, even when no eligible users are logged on.

---

## Working with queues and aggregates

### Configuring a queue

5. Under **In last step**, select how the queue handles the last step:
  - To allow the contact to time out, select **Wait for the specified step time**.
  - To have the contact continue waiting, select **Wait forever** (this is the default). In this case, you can select the **Time out when no eligible user is logged on** check box to select that limitation.

---

**IMPORTANT:** For voice queues, if a contact arrives at the last step in a queue with no time-out defined and no eligible users logged on, the contact will remain at the last step indefinitely. For callback and e-mail queues, if you allow the contact to time out, the system will delete the contact when it exceeds the specified time for the last step.

---

6. For a voice queue, if you selected **Wait for specified step time** in step 4 above, you must specify the time-out extension:
  - To select the default time-out extension, select **Global time-out extension**. For more information, see [Section 11.5.1, "Configuring the default voice routing strategy, queue, and time-out extension", on page 220](#).
  - To specify a time-out extension, select **Extension** and then type the extension number.
7. If you are finished working with this queue definition, click **OK**.

### 10.3.3 Configuring the queue overrides

You can configure a queue to override certain default settings, if required. You can:

- Override the default service level interval. For details on the default service level interval, see [Section 15.7.1, "Configuring the service level interval", on page 288](#).
- For an e-mail queue, override the default e-mail message settings. For details on the default e-mail message settings, see [Section 14.3.4, "Configuring the e-mail message settings", on page 258](#).
- For a callback queue, configure the maximum number of times that a callback associated with this queue can be retried.

**To configure the queue overrides:**

1. In the **Design Center**, click the tab for the media type you want to open.
2. Under **Resources**, click **Queues**, then, in the right pane, double-click the queue you want to configure.
3. Click the **Override** tab.
4. For any type of queue, you can override the default service level interval. Under **Override System Settings**, select the **Service level interval** check box, and then type or select the service level interval for this queue.
5. For an e-mail queue, you can override the default message settings. Under **Override System Settings**, do the following:
  - Select the **Prolog template** check box, and then select the Prolog template that you want to use for this queue from the list.
  - Select the **Signature template** check box, and then select the Signature template that you want to use for this queue from the list.
  - Select the **Original message label** check box, and then type the text that you want to appear above the original e-mail message when the user replies to an e-mail message, for example, **Original Message:**
  - Select the **Conversation ID label** check box, and then type the text that you want to appear in front of the Conversation ID when the user replies to an e-mail message. The Conversation ID is an identifier inserted by the OpenScape Contact Center E-mail Server to identify the message thread.
  - Select the **Reply prefix** check box, and then type the text that you want to appear at the beginning of the Subject line when the user replies to an e-mail, for example, **Re:**.
6. For a callback queue, under **Retry**, in the **Maximum number of retries** box, type or select the maximum number of times that the system can reschedule a callback associated with this queue.
7. If you are finished working with this queue definition, click **OK**.

### 10.3.4 Selecting the queue Wrap-up reasons

The Manager application allows you to associate Wrap-up reasons with a queue.

To configure the **Wrap-up reasons** for the queue:

## Working with queues and aggregates

### Configuring a queue

1. In the **Design Center**, click the tab for the media type that you want to open.
2. Under **Resources**, click **Queues**, then, in the right pane, double-click the queue that you want to configure.
3. Click the **Wrap-up reasons** tab.
4. Under **Wrap-up reasons**, select the check box for each Wrap-up reason that you want to associate with this queue. For more information, see [Section 5.2.4, "Configuring a Wrap-up reason", on page 56](#).
5. If you are finished working with this queue definition, click **OK**.

### 10.3.5 Selecting the queue aggregates

You can select the aggregates to which a queue belongs. For more information on aggregates, see [Section 10.4, "About aggregates", on page 219](#).

---

**NOTE:** You must create an aggregate before you can select it in a queue (see [Section 10.5, "Configuring an aggregate", on page 219](#)).

---

#### To select the queue aggregates:

1. In the **Design Center**, click the tab for the media type you want to open.
2. Under **Resources**, click **Queues**, then, in the right pane, double-click the queue you want to edit.
3. Click the **Aggregates** tab.
4. Under **Content**, select the check box for each aggregate in which to include this queue.
5. If you are finished working with this queue definition, click **OK**.

### 10.3.6 Selecting the queue reports

You can select the reports that will display information about the queue that you are configuring.

You can also configure the queue to override the global queue report intervals, if required. For details on the global queue report intervals, see [Section 7.13.1, "Configuring the global queue report intervals", on page 138](#).

**To select the queue reports:**

1. In the **Design Center**, click the tab for the media type you want to open.
2. Under **Resources**, click **Queues**, then, in the right pane, double-click the queue you want to edit.
3. Click the **Reports** tab.
4. Under **Include this queue in these reports**, select the check box for each report that you want to display data about this queue. The list contains only the reports you own, or reports that are owned by users you can monitor.
5. To override the global queue report intervals, under **Interval**, select the **Override system settings** check box, and then do the following:
  - In the **To** column for **Interval 1**, double-click the time and type the end time. The start of Interval 2 is updated to reflect the number you just typed.
  - In the **To** column for each other interval, double-click the time and type the end time. The end time for the last interval is always **Forever**.
6. If you are finished working with this queue definition, click **OK**.

## 10.4 About aggregates

An aggregate is a logical grouping of queues used for reporting purposes. Supervisors can view state information on aggregates in real-time reports or statistical summaries for aggregates in historical reports.

For example, you might be using the following queues:

- Mutual Funds-English
- Mutual Funds-German
- Stocks-English
- Stocks-German
- Bonds-English
- Bonds-German

## Working with queues and aggregates

### Configuring an aggregate

If you were interested in viewing the performance of all experts in the area of Mutual Funds, you could group the Mutual Funds-English and Mutual Funds-German into a single Mutual Funds aggregate, and generate reports on that aggregate. Likewise, you could group the three English skill queues and group the three German queues to compare and contrast the handling for contacts with the respective language contact requirement.

## 10.5 Configuring an aggregate

You can use aggregates to monitor similarly routed contacts, even if different queues are used.

---

**NOTE:** To create or change an aggregate, you must have Full or Modify access, respectively, for the associated Manager permission.

---

### To configure an aggregate:

1. On the **File** menu, point to **New**, then **Design Center**, then select the media type, and then click **Aggregate**.
2. On the **General** tab, under **Aggregate**, do the following:
  - In the **Name** box, type a unique name for the aggregate.
  - In the **Description** box, type a description for the aggregate.
3. Click the **Queues** tab.
4. Under **Include**, select the check box for each queue that you want to include in the aggregate.
5. Click the **Reports** tab.
6. Under **Include this aggregate in these reports**, select the check box for each report that you want to display data about this aggregate. The list contains only the reports you own, or reports that are owned by users you can monitor.
7. Click **OK**.

# 11 Working with voice resources

This chapter provides information on OpenScape Contact Center voice support. It introduces the interaction between the OpenScape Contact Center system and supported communication platforms, and provides instructions on voice-related tasks.

---

**NOTE:** For information on Call Director resources in the Telephony Center, see [Chapter 12, "Working with Call Director"](#). For information on IVR resources in the Telephony Center, contact your service representative.

---

## 11.1 Supported communication platforms

OpenScape Contact Center supports the following communication platforms:

- OpenScape Business V1

In working with a communication platform to manage contacts, the system's key responsibilities are calculating and delivering call routing directives, collecting statistics, and managing user interaction and component interaction with the communication platform. The platform is still responsible for initial call processing, fundamental operations such as transfers and holds, and other basic voice tasks.

You configure the communication platform settings in the Options dialog box. For details, see [Section 11.5.3, "Configuring the communication platform settings"](#), on page 223.

## 11.2 Basic interaction with the communication platform

This section provides a basic introduction to the OpenScape Contact Center interaction with the communication platform resources. You should be familiar with the communication platform resources as they pertain to your OpenScape Contact Center configuration before working with the Telephony Center.

---

**NOTE:** This section assumes that you have a basic understanding of communication platform components and their functions, and common terminology.

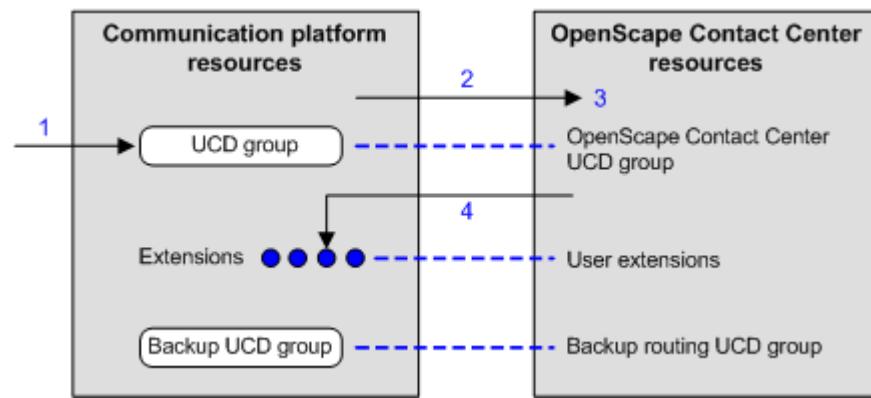
---

## Working with voice resources

Basic interaction with the communication platform

The resources on the communication platform required for OpenScape Contact Center operation are set up during installation and configuration, prior to Manager application configuration. For information on configuring the OpenScape Contact Center equivalents, see the *Manager Help*.

The following diagram provides a simple introduction to OpenScape Contact Center interaction with OpenScape Business communication platform resources. It shows the key communication platform resources monitored by OpenScape Contact Center, shows the OpenScape Contact Center configuration equivalents, and describes the interactions using an example of initial call processing.



The numbered steps are:

1. A CDL associates dialed numbers serviced by the contact center, with a dedicated UCD group.
2. The call is held on the communication platform while the platform notifies OpenScape Contact Center of the call.
3. Based on its queue/workflow setup, OpenScape Contact Center finds the best available user to handle the call.
4. Based on the extension to which the user is logged on, OpenScape Contact Center directs the communication platform to route the call to that extension.

## 11.3 Communication platform resources

To route telephone calls and gather statistics, OpenScape Contact Center monitors a set of key resources on the communication platform. Using the Manager application, you must configure a matching definition within OpenScape Contact Center for each resource on the communication platform.

---

**NOTE:** For details on how to configure the matching resource definitions, see the *Manager Help*.

---

The following resources are configured in OpenScape Contact Center for the OpenScape Business communication platform:

- User IDs
- Extensions
- UCD Groups
- Requeue Targets

The user IDs, extensions, and UCD groups can be synchronized with the communication platform to share configuration information. For more information, see [Section 11.4, "About Config Sync", on page 213](#).

## 11.4 About Config Sync

The Config Sync (configuration synchronization) feature monitors key contact center communication platform resources and synchronizes the OpenScape Contact Center definitions with the definitions on the communication platform. When a configuration change is detected, Config Sync immediately provides the OpenScape Contact Center system with the details of the change, thus reducing configuration errors, manual entry, and duplicate administration. For a list of communication platform resources that can be monitored, see [Section 11.3, "Communication platform resources", on page 216](#).

Config Sync monitors and synchronizes communication platform resources only within specified resource domain ranges. This allows you to set up the Config Sync feature to focus on dedicated contact center resources, such as an agent's extension, and ignore nonessential resources, such as the extension at the reception desk. For example, in a small contact center, you might set up Config Sync to monitor extensions in the range 121 through 140. When a new extension in that range is created on the communication platform, an equivalent extension definition is created in OpenScape Contact Center.

Synchronization is driven by the OpenScape Contact Center Config Sync Server. When the Config Sync Server starts or when you explicitly synchronize resources, the Config Sync Server synchronizes the OpenScape Contact Center definitions with those on the communication platform. For details on how to enable the Config Sync feature, see [Section 11.5.4, "Configuring the Config Sync settings", on page 229](#).

Config Sync treats changes to user IDs and other resources differently. For details, see [Section 11.4.1, "Config Sync treatment of user IDs", on page 218](#), and [Section 11.4.2, "Config Sync treatment of other resources", on page 219](#).

### 11.4.1 Config Sync treatment of user IDs

The following table lists the actions taken when the Config Sync Server detects changes to user IDs that fall within a defined Config Sync domain range.

Config Sync Server detects...	Action taken...
A user was added to the communication platform that does not exist in OpenScape Contact Center	Config Sync creates a new basic definition for the user in OpenScape Contact Center (user ID, user name, and backup group) and sets the resource state to <b>Incomplete</b> . For details on completing the definitions, see <a href="#">Section 11.4.1.1, "Completing a user definition created by Config Sync", on page 219</a> .
A user was added to OpenScape Contact Center that does not exist on the communication platform	Config Sync sets the OpenScape Contact Center definition state to <b>Communication Platform Synchronization Error</b> .
A user was deleted from the communication platform but still exists in OpenScape Contact Center	If the user has permission to handle calls only, Config Sync sets the OpenScape Contact Center definition state to <b>Inactive</b> . If the user has permission to log on to other media, then voice is disabled for the user.
A user was deleted from OpenScape Contact Center but still exists on the communication platform	Config Sync sets the OpenScape Contact Center definition state to <b>OpenScape Contact Center Synchronization Error</b> .

Table 10

Config Sync actions on changes to user IDs

### 11.4.1.1 Completing a user definition created by Config Sync

When the Config Sync Server detects a new user definition on the communication platform, with an ID that falls within one of the defined Config Sync domain ranges, it creates a minimal user definition in OpenScape Contact Center. The user definition consists of the following:

- User ID
- User name
- Backup group

Before a user can become fully functional, you must complete the properties in the user definition. One way to check for incomplete user definitions is to check the Administration Center for users in **Incomplete** state. This is often an indication that the user definition has been recently created.

#### To complete a user definition created by Config Sync:

1. In the **Administration Center**, under **General**, click **Users**, then, in the right pane, double-click the user you want to complete.
2. Complete the remaining user properties, as required (see [Section 4.1, "Configuring a user", on page 25](#)).

### 11.4.2 Config Sync treatment of other resources

The following table lists the actions taken when the Config Sync Server detects changes to resources other than user IDs (such as extensions and requeue targets) whose identifiers fall within a defined Config Sync domain range.

Config Sync Server detects...	Action taken...
A resource was added to the communication platform that does not exist in OpenScape Contact Center	Config Sync creates a new OpenScape Contact Center definition for the resource, gives it the name of the domain range, and sets the resource state to <b>Active</b> .
A resource was added to OpenScape Contact Center that does not exist on the communication platform	Config Sync sets the OpenScape Contact Center definition state to <b>Communication Platform Synchronization Error</b> .

Table 11

Config Sync actions on changes to other resources

## Working with voice resources

Configuring the voice options

Config Sync Server detects...	Action taken...
A resource was deleted from the communication platform but still exists in OpenScape Contact Center	Config Sync deletes the OpenScape Contact Center definition of the resource.
A resource was deleted from OpenScape Contact Center but still exists on the communication platform	Config Sync sets the OpenScape Contact Center definition state to <b>OpenScape Contact Center Synchronization Error</b> .

Table 11 *Config Sync actions on changes to other resources*

## 11.5 Configuring the voice options

Use the voice options to configure the default settings for the voice feature. For details, see the following topics:

- [Section 11.5.1, “Configuring the default voice routing strategy, queue, and time-out extension”, on page 220](#)
- [Section 11.5.2, “Configuring the voice error queue settings”, on page 222](#)
- [Section 11.5.3, “Configuring the communication platform settings”, on page 223](#)
- [Section 11.5.4, “Configuring the Config Sync settings”, on page 229](#)

---

**NOTE:** To configure any of the voice options, you must have Full or Modify access for the associated Manager permission.

---

### 11.5.1 Configuring the default voice routing strategy, queue, and time-out extension

You must specify the following defaults for the voice feature:

- **Default routing strategy workflow** – The routing strategy workflow that is initially used to route all calls in the contact center. You can configure the default routing strategy workflow to link to other routing strategy workflows, if required.
- **Default queue** – The queue that you want to use as the default option for the no match found (\*) entry in a Destination Table component.

- **Time-out extension** – The extension to which a call will be routed provided that a time-out is specified when you configure a queue. In general, the time-out extension should be used to move the call outside the OpenScape Contact Center system. The time-out extension should *not* be configured to reference a CDL call number for a UCD group.

Before configuring these settings, be sure to create the routing strategy workflow (see [Section 9.4, "Configuring a routing strategy workflow", on page 171](#)) and the queue (see [Section 10.3, "Configuring a queue", on page 202](#)) that you want to use as the default.

#### To configure the default voice routing strategy and queue:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Voice**.
3. On the **General** tab, under **Default**, do the following:
  - In the **Routing strategy** list, select the voice routing strategy you want to use to initially route all calls.
  - In the **Queue** list, select the voice queue that you want to use as the default option for the no match found (\*) entry in a Destination Table component.
  - In the **Time-out extension** box, type the extension that you want to use as the default time-out extension. The time-out extension is the extension to which a call will be routed provided that a time-out is specified when you configure a queue.
4. Click **OK**.

### 11.5.2 Configuring the voice error queue settings

The error queue is the queue to which calls are routed in the case of recoverable system errors. Recoverable system errors are errors generated by the OpenScape Contact Center servers that cannot be handled by the **Exit on error** option provided in some of the workflow components. If the system detects a recoverable system error in a routing strategy workflow, the call is routed to the error queue where it can then be routed to an appropriate user.

In the case of a critical error, such as a system outage while the call is being handled on a voice processor extension, the system will transfer the call to the error transfer number. The error transfer number does not serve the same purpose as the time-out extension associated with

## Working with voice resources

### Configuring the voice options

a queue. The error transfer number should be a CDL call number for an OpenScape Contact Center UCD group.

---

**NOTE:** If a system outage occurs where the system can no longer process the call, the communication platform can then invoke backup routing.

---

#### To configure the voice error queue:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Voice**.
3. On the **General** tab, under **Error**, do the following:
  - In the **Queue** list, select the queue to which contacts are directed in the case of recoverable errors.
  - In the **Description** box, type a description for the error queue.
  - In the **Transfer number** list, select the number to which contacts are directed in the case of critical errors.
4. Click **OK**.

### 11.5.3 Configuring the communication platform settings

When you installed the OpenScape Contact Center software, you selected the communication platform to which the system is connected.

---

**IMPORTANT:** Changing the communication platform type after initial system setup can adversely affect the operation of the system. Contact your service representative if you plan to change your communication platform. You might not have the necessary software on the server machine to work with a different communication platform. In most cases, you should change the communication platform type only when you are connected to a design database for configuration purposes. When you are connected to the production database, changing the communication platform type will require that you restart the OpenScape Contact Center service on the main server machine.

---

You can configure the settings for the selected communication platform, including:

- The setting of the OpenScape Contact Center Ring No Answer feature.
- The CSTA server settings for the communication platform interface module.

**To configure an OpenScape Business:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Voice**.
3. Click the **Communication Platform** tab.
4. To enable the OpenScape Contact Center Ring No Answer feature, select the **Enable Ring No Answer** check box.
5. Under **CSTA Server Settings**, do the following:
  - In the **Host name** box, type the host name of the server machine where the CSTA server resides.
  - In the **Port number** box, type the port number of the CSTA server.
6. Click **OK**.

## **11.5.4 Configuring the Config Sync settings**

You can enable the Config Sync feature (see [Section 11.4, “About Config Sync”, on page 217](#)) and configure various settings related to the feature, such as when synchronization occurs.

**To configure the Config Sync settings:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Voice**.
3. Click the **Config Sync** tab.
4. To enable the synchronization settings, under **Config Sync**, select the **Enable** check box.

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### Configuring the voice options

5. Under **Communication Platform Access**, configure the following items that enable the Config Sync Server to access the communication platform and potentially make changes to communication platform resources:
  - a) In the **IP address** box, type the IP address of the communication platform.
  - b) In the **Port number** box, type the appropriate port number of the communication platform.
  - c) In the **Logon name** box, type the user name needed to log on to the communication platform.
  - d) In the **Password** box, type the password needed to log on to the communication platform.
  - e) In the **Confirm password** box, retype the password to confirm that you entered it correctly.
6. Under **Range Allocation**, in the **Automatic creation size** box, type the size of the automatically defined resource domain range. If you create a resource in OpenScape Contact Center that is outside the Config Sync resource domain range, you are prompted to add it to the domain range. The value in this box defines the increment that is used. You can enter a value from 1 to 1000. The default value is 1.
7. Under **Synchronization**, select the **At data maintenance time** check box to automatically synchronize the communication platform and OpenScape Contact Center resources after data maintenance is performed, normally about 20 minutes after the data maintenance time.

---

**NOTE:** If you have the required administrator permission, you can click **Synchronize now** to manually synchronize the communication platform and OpenScape Contact Center resources, but this should be done only during periods of low contact volume.

---

## 12 Working with Call Director

This chapter introduces Call Director and provides instructions on working with configurable Call Director resources in the Manager application

Call Director is a licensed voice feature that allows you to play messages and interact with the caller. A message (.wav file) can greet the caller, provide a menu prompt, gather numerical data, or play a performance level statistic. For example, you can prompt the caller to "Press 1 for Service, or press 2 for Sales".

Call Director components can help you match callers to the best available user in routing strategy and queue processing workflows. You must use third-party applications to create .wav files for use with the Call Director components. For details, see [Section 12.3.3, "Configuring a .wav file", on page 226](#).

### 12.1 Communication platform and voice processor interaction

When the system is licensed for Call Director, a Contact Media Service voice processor is used to play announcements and interactive recordings, and collect digits input by a caller.

When a workflow component invokes a Call Director function, the call is routed to an extension dedicated to Call Director services.

---

**NOTE:** When a call is routed to an interactive Call Director extension, the caller might hear a short ring before the voice processor answers the call.

---

In the Telephony Center, each Call Director extension associates a voice processor extension (or channel) with a communication platform extension dedicated to interactive messages. For announcements, the Call Director extension also associates a communication platform Device ID.

The number of extensions required is a function of capacity and depends on the site. Since the system supports only a single voice processor, particularly complex workflows may require more

## Working with Call Director

### Call Director workflow components

extensions than are available on the system. For more information, contact your service representative.



Ensure that you complete the voice processor configuration before configuring the Call Director extensions. For details, see [Section 12.3.1, "Configuring a voice processor", on page 223](#). For information on how to configure Call Director extensions, see the *Manager Help*.

## 12.2 Call Director workflow components

The following workflow components directly invoke Call Director functionality:

- Menu Prompt components play an audible voice prompt to a caller and the routing of the contact or subsequent processing in the workflow can be based on the caller's response.
- Message components play an audible message to one specific contact.
- Performance Message components play an audible message followed by a queue statistic message, followed by a final message.
- Digit Collection components play an audible message, collect numeric information, such as an account number, from the caller, and store it in the Contact Data.
- Number Playback components play a number back to a call. The number can be configured as part of the component or retrieved from Contact Data.

For configuration details for these components, see the *Manager Help*.

## 12.3 Configuring the Call Director resources

Before you can use Call Director components in a workflow, you must:

- Configure the Call Director extensions – see the *Manager Help*.
- Configure the voice processor – see [Section 12.3.1, "Configuring a voice processor", on page 224](#).
- Configure the .wav files that you want to use – see [Section 12.3.3, "Configuring a .wav file", on page 226](#).

---

**NOTE:** Your initial Call Director configuration is typically set up by your service representative. For information on the setup tasks, see the *Communication Platform Integration Guide*.

---

### 12.3.1 Configuring a voice processor

If you are using Call Director, you must configure the voice processor to be used with the system. The system supports the use of only one Contact Media Service voice processor.

---

**IMPORTANT:** When you are connected to the production database, ensure that you complete the voice processor configuration before configuring the Call Director extensions.

---

**To configure a voice processor:**

1. On the **File** menu, point to **New**, then **Telephony Center**, and then click **Voice Processor**.
2. Under **Voice Processor**, do the following:
  - In the **Name** box, type the name of the voice processor.
  - In the **Description** box, type a description for the voice processor. In the **Host name** box, type the host name or IP address of the host machine where the voice processor is located.
  - In the **Port number** box, type the port number that the voice processor uses for CTI communication. Default: 6027
  - In the **Password** box, type the password for the user account that is used to establish a connection with the voice processor for CTI communication. Default: Un1Fy

## Working with Call Director

Configuring the Call Director resources

3. Click **OK**.

### 12.3.2 Configuring a .wav file

If the Call Director feature is enabled, you must configure a resource for each sound (.wav) file that you want to use in Call Director workflow components and other settings related to Call Director.

---

**NOTE:** To create or change a .wav file, you must have Full or Modify access, respectively, for the **WAV files** Manager permission.

---

You can upload a .wav file from the main server machine or from a client machine. The uploaded .wav files are stored in the WaveFiles folder on the main server machine. The file path names are not stored in the resource. The system looks in the designated WaveFiles folder for the .wav files.

The .wav files must meet specific requirements (see [Section 12.3.3.1, "Call Director .wav file requirements", on page 228](#)). The .wav files must be created using third-party software and hardware. We do not provide the software or hardware required to create .wav files.

**To configure a .wav file:**

1. On the **File** menu, point to **New**, then **Design Center**, then **Voice**, and then click **WAV File**.
2. On the **General** tab, under **File**, do the following:
  - In the **Name** box, type the name of the .wav file. You can browse to select and upload the .wav file to the WaveFiles folder.

---

**NOTE:** If you are connected to a production database, you can click  to play the .wav file. You cannot play .wav files when you are connected to a design database.

---

---

**NOTE:** If you are connected to a production database, you can click  to download the .wav file. You cannot download .wav files when you are connected to a design database.

---

- In the **Description** box, type a description for the .wav file. Use the description to specify what information is presented in the .wav file.

The **Installed** check box is a read-only item used when you are connected to a production database to indicate whether or not the .wav file is installed in the WaveFiles folder. If the system cannot find the .wav file, the **Installed** check box is cleared. This check box is always cleared when you are connected to a design database. You can save the .wav file definition even though the system cannot find the .wav file.

3. Click the **Security** tab. This tab is available only if the enhanced security option is enabled. For details, see [Section 15.3.4, "Configuring the enhanced security option", on page 272](#).
4. Under **Users**, select the check box for each user who you want to be able to modify this .wav file. The list contains only the users who have Full or Modify access to the **WAV files** Manager permission.
5. Click **OK**.

### 12.3.2.1 Call Director .wav file requirements

When creating a .wav file, you must ensure that it meets the following requirements.

The maximum metallic signal power averaged over any 3-second interval in the 200-3995 Hz voice band does not exceed the following ANSI/TIA-986-A signal power limitation requirements mandated by the FCC:

- The analog CO/DID trunk and OPS line interfaces do not exceed -9 dBm
- The 2-wire and 4-wire lossless tie trunk type interfaces do not exceed -15 dBm
- The digital T1 and ISDN PRI/BRI interfaces do not exceed - 12 dBm

The name of the .wav file contains only alphanumeric and underscore characters (A-Z, a-z, 0-9 and "\_"), has a .wav extension, and is less than or equal to 25 characters, excluding the extension and path information. For example, the following are valid .wav file names:

- First\_Message.wav
- Next\_Msg1.wav
- Next\_Msg2.wav
- 1203\_Entry.wav

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- 1stError\_File.wav

## 12.4 Configuring the Call Director options

You can configure the various default options for the Call Director feature. For details, see the following topics:

- [Section 12.4.1, “Configuring the Call Director general options”, on page 229](#)
- [Section 12.4.3, “Configuring the Call Director default navigation”, on page 233](#)
- [Section 12.4.4, “Configuring the Call Director responses”, on page 235](#)

---

**NOTE:** To configure any of the Call Director options, you must have Full or Modify access for the associated Manager permission.

---

---

**NOTE:** You can override some of these default options when you configure a workflow. For details, see [Section 9.4.1, “Overriding the default Call Director settings”, on page 173](#).

---

### 12.4.1 Configuring the Call Director general options

You can configure various general options for Call Director, such as the extension allocation and standard language.

Before you begin, the .wav files that you want to use must be configured and installed on the main server machine (see [Section 12.3.3, “Configuring a .wav file”, on page 226](#)).

**To configure the Call Director general options:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Call Director**.

3. On the **General** tab, under **Extension Allocation**, do the following:
  - In the **Interactive (%)** column, double-click the number in the **Routing Strategy** row and type the percentage of all available interactive extensions that you want to reserve for playing interactive messages in a routing strategy workflow.
  - In the **Announcement (%)** column, double-click the number in the **Routing Strategy** row and type the percentage of all available announcement extensions that you want to reserve for playing announcements in a routing strategy workflow.
  - In both cases, the application automatically updates the **Queue Processing** row so that the Total equals 100. For examples, see [Section 12.4.1.1, "Extension allocation ratio examples", on page 229](#).
4. Under **Language**, click **Standard** and select the language you want to use for spoken messages from the list. The list contains the languages supported by the voice processor.

In order to use another language than one of the standard languages:

1. Click **Custom locale ID**
2. Enter an appropriate value, for example 1043 for "Dutch - Netherlands".
3. For a custom language you need to record the .wav files by yourself or obtain them from a 3rd party. These are system .wav files, used in Number Playbacks and Performance Messages, for example announcing the wait time in a queue.
4. Store these .wav files on the OSCC server in the folder  
`%HPPCDIR%\SystemVoice\<custom locale id>\Unisex`  
equivalent to the standard languages, where `<custom locale id>` is the value associated with the custom language.

---

**NOTE:** When using a custom language, all played .wav files are taken from the *Unisex* folder, as opposed to the standard languages. For the standard languages the .wav files are taken from both the *Male* and *Female* folders, depending on grammatical context.

---

5. Under **Outage Threshold**, in the **Extensions out of service** box, type or select the percentage of Call Director extensions that must be out of service before the Call Director Server becomes nonoperational. The default value is 75%.

## Working with Call Director

Configuring the Call Director options

6. Under **Error**, in the **Message file name** list, select the .wav file that plays if an error occurs. This error message will be played if the connectivity between Call Director and the voice processor is lost. This same message will be played if the Call Director Server encounters an error in workflow, unless you override this error message in a specific workflow diagram (see [Section 9.4.1, "Overriding the default Call Director settings", on page 173](#)).

---

**NOTE:** If you are connected to a production database, you can click  to play the .wav file. You cannot play .wav files when you are connected to a design database.

---

7. Click **OK**.

### 12.4.1.1 Extension allocation ratio examples

When you configure the Call Director general options, under **Extension Allocation**, you specify the percentage of interactive extensions and announcement extensions that you want to reserve for routing strategy workflows and queue processing workflows. For details on how to configure the general options, [Section 12.4.1, "Configuring the Call Director general options", on page 229](#).

If a fraction of an extension remains after the ratio is applied, the fraction is assigned to the routing strategy workflows. For example, assume you have 10 extensions. Some examples of how the extensions would be allocated are shown in the following table.

Extension allocation		Actual number of extensions reserved	
Routing strategy	Queue processing	For routing strategy workflows	For queue processing workflows
50%	50%	5	5
1%	99%	1	9
55%	45%	6	4
99%	1%	10	0

Table 12 Extension allocation examples

---

**NOTE:** In the event that a Call Director extension is deleted, the system might automatically reallocate extensions to either routing strategy workflows or queue processing workflows based on the configured extension allocation.

---

## 12.4.2 Configuring the Call Director default navigation

You can configure the navigation keys that can be used globally for Call Director components in workflows. A navigation key is a digit on the telephone that a caller can enter to move from one Call Director component in a workflow to another. You can choose a subset of these keys for each Call Director component that you configure.

Before you begin, the .wav files that you want to use must be configured and installed on the main server machine (see [Section 12.3.3, "Configuring a .wav file", on page 226](#)).

**To configure the Call Director default navigation:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Call Director**.
3. Click the **Interaction** tab.
4. Under **Default Navigation**, select the check box for each function that you want to make available to a caller. If you want to change the key assigned to the function, click the cell in the **Key** column and select the key from the list. You can choose from the following functions:
  - **Operator** – Enables the caller to transfer to the Operator.
  - **Return to Root Step** – Enables the caller to return to the first interactive component in the routing strategy workflow or queue processing workflow.
  - **Repeat** – Enables the caller to repeat the current component.
  - **Previous** – Enables the caller to return to the previous interactive component. If a caller is at the first component, the component action is repeated.
  - **Help** – Enables the caller to listen to a .wav file containing help for the routing strategy workflow or queue processing workflow.

---

**IMPORTANT:** If the same key is used for Help and another function, the Help will always take precedence over the other function. We recommend that you always use the asterisk (\*) key to provide Help for the Call Director feature.

---

## Working with Call Director

Configuring the Call Director options

5. If you selected the **Operator** function, do the following:
  - In the **Operator Queue** list, click the queue that the call is forwarded to when the caller presses the Operator key.
  - In the **Operator transfer file** list, click the .wav file that plays when the caller is transferred to the operator.

---

**NOTE:** If you are connected to a production database, you can click  to play the .wav file. You cannot play .wav files when you are connected to a design database.

---

6. If you selected the **Help** function, in the **Help file name** list, click the .wav file that plays when the caller accesses the help.
7. Click **OK**.

### 12.4.3 Configuring the Call Director responses

You can configure the Call Director responses that are used when a caller gives no response, or an invalid response, to a Call Director component in a routing strategy workflow or queue processing workflow.

Before you begin, the .wav files that you want to use must be configured and installed on the main server machine (see [Section 12.3.3, "Configuring a .wav file", on page 226](#)).

#### To configure the Call Director responses:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Call Director**.
3. Click the **Interaction** tab.
4. Under **Response Attempts**, in the **Maximum number** box, type or select the maximum number of times the system will accept no response from a caller before transferring the call to the error queue. You can specify a number between 1 and 9.

5. Under **No Response**, do the following:

- In the **Maximum time** box, type or select the maximum amount of time, in seconds, that the system will wait for input from a caller before determining there is no response. You can specify a value between 1 and 60 seconds.
- In the **Message file name** list, select the .wav file that plays when the caller does not respond within the specified amount of time. You can override this .wav file in a specific workflow diagram (see [Section 9.4.1, "Overriding the default Call Director settings", on page 173](#)).

---

**NOTE:** If you are connected to a production database, you can click  to play the .wav file. You cannot play .wav files when you are connected to a design database.

---

6. Under **Invalid Response**, in the **Message file name** list, select the .wav file that plays when the caller presses an incorrect telephone button. You can override this .wav file in a specific workflow diagram (see [Section 9.4.1, "Overriding the default Call Director settings", on page 173](#)).

7. Click **OK**.

## **Working with Call Director**

Configuring the Call Director options

# 13 Working with the callback feature

This chapter introduces the callback feature and provides instructions on working with configurable callback options in the Manager application.

The callback feature is a licensed feature that allows you to provide users and customers with the ability to generate callbacks. A callback is a request for a return call that is usually based on a customer's previous interaction with the contact center.

A callback can be generated in the following ways:

- A callback request is generated as part of the workflow using a Create Callback component. For details on the Create Callback component, see the *Manager Help*.
- A voice queue can be configured so that a callback is created automatically when a customer abandons a call. For details, see [Section 10.3.1, "Configuring the general queue information", on page 203](#). This method of callback generation assumes that you have ANI numbers coming into the communication platform.

---

**NOTE:** Support is provided for additional ways of creating callbacks programmatically, for example, by having an IVR gather contact information to generate a callback. Contact your service representative for details.

---

- A customer generates a callback request from a Web page. For details, see [Section 13.3.3, "Configuring the Web callback settings", on page 241](#).

---

**NOTE:** We recommend that you configure callback-specific agents in a separate UCD group on the communication platform to prevent unwanted backup routing.

---

To handle callbacks, you must set up callback-specific queues.

## 13.1 Callback processing

Regardless of how it is created, each callback gets scheduled for a specific time interval on a specific day. At the scheduled time, the callback is enqueued to a callback queue. The callback queue to which the callback is directed depends on how the callback was created:

- For callbacks created during the processing of a routing strategy or queue processing workflow, the queue is specified in the Create Callback component.
- For voice queues configured to create a callback when a customer abandons a call, the voice queue also specifies the target callback queue.
- For callbacks created from a Web page, a set of HTML template pages are provided that let you specify the target callback queue among other things.

---

**NOTE:** For information on configuring a callback queue, see [Section 10.3, "Configuring a queue", on page 202](#).

---

The queue step execution attempts to find a user who is able to handle the callback. When an eligible and available user is found, the callback is assigned to that user. A screen pop with details on the callback is presented to the user.

With respect to the callback settings and options configured using the Manager application, the key aspects of user options are:

- If the user does not have permission to preview the contact to view more details, the basic contact details will be displayed for a configurable interval and then the call to the customer will be automatically initiated.
- If the user has permission to preview the contact, the user can accept or delete the contact. If the user does not accept or delete the contact within a configurable interval, the callback will be requeued.
  - If the user deletes the callback, a site-defined Delete reason must be provided. This completes processing of the callback.
  - If the user accepts the callback and the call cannot be completed, the user can schedule a retry either immediately or at a later time. The number of retries that can be attempted is configurable, and each time the user requests a retry, a site-defined Retry reason must be provided.

- If the user accepts the callback and the call to the customer is established successfully, the user can handle the contact in the same way that any other call is handled. When the user disconnects, the user must indicate that the callback was handled successfully or schedule a retry.

## 13.2 Configuring the callback resources

You must configure various resources that impact the callback feature.

---

**NOTE:** Your initial callback configuration is typically set up by your service representative. For information on the setup tasks, see the *Communication Platform Integration Guide*.

---

### 13.2.1 Configuring a Retry reason

A Retry reason is an explanation that a user can select when a callback is unsuccessful and must be retried. Retry reasons are commonly used to indicate conditions such as no answer or busy line.

The Manager application provides a set of predefined Retry reasons. You cannot delete or rename these Retry reasons, although you can modify their descriptions.

---

**NOTE:** To create or change a Retry reason, you must have Full or Modify access, respectively, for the **Retry reasons** Manager permission.

---

#### To configure a Retry reason:

1. On the **File** menu, point to **New**, then **Design Center**, then **Callback**, and then click **Retry Reason**.
2. In the **Name** box, type a unique name for the Retry reason.
3. In the **Description** box, type a description for the Retry reason.
4. In the **Retry Interval** box, type the number of hours and minutes after which the system will retry the callback.
5. Click **OK**.

## Working with the callback feature

Configuring the callback resources

### 13.2.2 Configuring a Delete reason

A Delete reason is an explanation that a user can select when deleting a callback. Delete reasons are commonly used to indicate conditions such as the user recognizing an invalid telephone number.

The Manager application provides a set of predefined Delete reasons. You cannot delete or rename these Delete reasons, although you can modify their descriptions.

---

**NOTE:** To create or change a Delete reason, you must have Full or Modify access, respectively, for the **Delete reasons** Manager permission.

---

#### To configure a Delete reason:

1. On the **File** menu, point to **New**, then **Design Center**, then **Callback**, and then click **Delete Reason**.
2. In the **Name** box, type a unique name for the Delete reason.
3. In the **Description** box, type a description for the Delete reason.
4. Click **OK**.

### 13.2.3 Configuring an excluded number

You can configure a list of telephone numbers that are excluded from callbacks. For example, you should exclude emergency numbers, such as the numbers for ambulance and police.

---

**NOTE:** To create or change an excluded number, you must have Full or Modify access, respectively, for the **Excluded numbers** Manager permission.

---

#### To configure an excluded number:

1. On the **File** menu, point to **New**, then **Design Center**, then **Callback**, and then click **Excluded Number**.
2. In the **Name** box, type a unique name for the excluded number.
3. In the **Telephone number** box, type the telephone number you want to exclude from callbacks. 
4. Click **OK**.

## 13.3 Configuring the callback options

Use the callback options to configure the default settings for the callback feature. For details, see the following topics:

- [Section 13.3.1, "Configuring the general callback settings", on page 237](#)
- [Section 13.3.2, "Configuring the callback routing schedule", on page 240](#)
- [Section 13.3.3, "Configuring the Web callback settings", on page 241](#)

---

**NOTE:** To configure any of the callback options, you must have Full or Modify access for the associated Manager permission.

---

### 13.3.1 Configuring the general callback settings

You can configure various general options for callbacks, such as the automatic dial delay, and the options that affect the automatic generation of a callback when a customer abandons a call. For information on configuring a voice queue to automatically create a callback on abandon, see [Section 10.3.1, "Configuring the general queue information", on page 203](#).

#### To configure the general callback settings:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Callback**.
3. On the **General** tab, under **Callback Settings**, do the following:
  - In the **Automatic dial delay**, type or select the amount of time the system waits after offering a callback to a user who does not have permission to preview contacts, before automatically dialing the callback. This gives the user some time to review the callback information. The maximum delay is 60 seconds.
  - In the **Maximum time to enter result** box, type or select the amount of time the user has after disconnecting a callback to indicate that the callback was successful or to schedule a retry, before the user is placed in Unavailable routing state.

## Working with the callback feature

Configuring the callback options

- To translate the number to be called based on your TAPI configuration, select the **Format Callback Number** check box. Some communication platforms can be configured to provide dialable calling numbers so that no translation is required. In this case, you would clear the check box to use the calling number directly, without translation. If you do not have TAPI configured, selecting this check box does not have any effect.

4. Under **Create Callback on Abandon**, do the following:

- In the **Abandon Threshold** box, type or select the minimum amount of time that a call must be in queue before being abandoned, for a callback to be created.
- In the **Default Priority** box, type or select the default priority of the callback that is created. You can specify a value between 1 and 100, where 100 is the highest priority.

---

**NOTE:** If the **Create callback on call abandon** option is enabled for a queue and a call in the associated queue is abandoned by a caller, the system checks the callback schedule to verify that a callback can be handled within the next 24 hours. If a callback is created, it remains active for 24 hours after the call was abandoned and is then deleted by the system.

---

5. Under **Duplicate Entries**, select the **Prevent duplicate callback** check box if you want the system to allow only one callback entry with the same destination telephone number and queue.

---

**NOTE:** If the **Prevent duplicate callback** option is enabled, the Callback Server still creates an exit point for the Create Callback component when a duplicate callback is encountered.

---

6. Under **Schedule**, configure the callback schedule (see [Section 13.3.2, "Configuring the callback routing schedule", on page 240](#)).

7. Click **OK**.

### 13.3.2 Configuring the callback routing schedule

The callback routing schedule restricts the hours of operation during which a callback can be scheduled within the contact center. You can configure the default callback routing schedule, as well as exceptions to the default schedule.

**To configure the callback routing schedule:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Callback**.
3. On the **General** tab, under **Schedule**, click **Edit Schedule**.
4. In the **Callback Routing Schedule** dialog box, double-click the day you want to configure, and then edit the active time range for the day.

---

**NOTE:** You can also drag the start or end point of an active range to change the range.

---

5. Optionally, click the **Exceptions** tab to create an exception to the default schedule. An exception overrides the schedule for the entire day.
  - a) On the calendar, click the day for which you want to schedule an exception, for example, a national holiday. The **Default** row shows the default schedule for that day.
  - b) Select the **Override** check box.
  - c) In the **Override** row, double-click a cell, and then edit the active time range for the override schedule. Click **OK**.
6. Use the **Summary** tab to view the schedule by status or by day of the week.
  - To see the days and times when the schedule is active or inactive, expand **By Status**, and then click **Active** or **Inactive**, respectively.
  - To see the schedule for that day, expand **By Day**, and then click the day of the week.
7. Click **OK**.

## Working with the callback feature

### Generating a Scheduled Callback List

### 13.3.3 Configuring the Web callback settings

Your company can provide a Web interface where customers can request information or support. These customer requests can be used by OpenScape Contact Center to generate callbacks.

This section describes how to enable the Web interface and configure the port that the Web Interaction Server uses to communicate with the corporate Web server.

---

**IMPORTANT:** When you are connected to the production database, if you change the port number, you will be required to restart the Web Interaction Server on the main server machine.

---

#### To configure the Web callback settings:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Callback**.
3. Click the **Web Callback** tab.
4. To enable the generation of callbacks via the Web interface, under **Web Callback**, select the **Enable** check box.
5. Under **Port Settings**, in the **Port number** list, select the port number that the Web Interaction Server uses to communicate with the corporate Web server for Web callback requests. You can select an unsecured or a secured (TLS-enabled) port. For more information, see [Section 15.3.3, "Configuring the Web server settings", on page 270](#).
6. Click **OK**.

### 13.4 Generating a Scheduled Callback List

You can generate a list of callbacks that are scheduled to be queued in the future and have not yet been queued or routed. The list can be generated for specific callback types and queues.

---

**NOTE:** To generate a Scheduled Callback List, you must have the **Scheduled callback list** Manager permission.

---

**To generate a Scheduled Callback List:**

1. To access the **Scheduled Callback List** dialog box, do one of the following:
  - On the **Actions** menu, click **Scheduled Callback List**.
  - On the **View** menu, point to **Activity Reports**, and then click **Scheduled Callback List**.
2. Under **Criteria**, do the following:
  - In the **Origin Type** box, select where the callbacks you want to report on originated from. You can select one of the options in the list or **All**.
  - In the **Start** area, select the start date and time for the interval the report is to cover. The time is specified using a 24-hour clock.
  - In the **End** area, select the end date and time of the interval.
3. Under **Queues**, select the queues for which you want to see the scheduled callbacks.
4. On the **Actions** menu, click **Find Now**.

## **Working with the callback feature**

### Generating a Scheduled Callback List

# 14 Working with the e-mail feature

This chapter introduces the e-mail feature and provides instructions on working with configurable e-mail resources in the Manager application.

The e-mail feature is a licensed feature that allows you to provide customers with the ability to request assistance from your contact center through e-mail messages. The customer submits a request to a particular e-mail address and the e-mail message is routed through your corporate e-mail server to the OpenScape Contact Center E-mail Server. All e-mail messages are stored in a single mailbox on the corporate e-mail server. You need to configure multiple e-mail destinations if you want to have multiple e-mail addresses for your contact center.

The OpenScape Contact Center E-mail Server and the corporate e-mail server communicate using IMAP4 (Internet Messaging Access Protocol). The OpenScape Contact Center applications and the corporate e-mail server also use IMAP4 to retrieve and process e-mail messages. Message attachments are retrieved using separate IMAP4 and MIME functions. Reply e-mail messages are sent to customers using an SMTP (Simple Message Transfer Protocol) interface.

---

**NOTE:** No virus protection is provided by the OpenScape Contact Center E-mail Server. Protection should be provided by the corporate e-mail server and the operating system.

---

Queues, a routing strategy workflow, and optionally queue processing workflows, must be created specifically for e-mail messages.

## 14.1 E-mail workflow considerations

Within OpenScape Contact Center, the routing of incoming e-mail messages is initiated with an e-mail routing strategy workflow (see [Section 9.4, "Configuring a routing strategy workflow", on page 171](#)). While e-mail workflows can make use of common workflow features, there are also a number of options available specifically for working with e-mail messages:

- E-mail messages can be categorized by the extraction of relevant keywords and phrases in the e-mail message. OpenScape Contact Center can then route the e-mail message to the appropriate queue based on the e-mail category. For more information, see [Section](#)

## Working with the e-mail feature

### E-mail workflow considerations

#### [14.1.1, "Working with categories", on page 244.](#)

- Other e-mail component types let you automate e-mail actions. Responses and acknowledgments can be generated and delivered while the e-mail message is being processed by the routing strategy workflow or is enqueued. For more information, see [Section 14.1.2, "Other e-mail workflow components", on page 246.](#)

Ultimately, an e-mail routing strategy workflow must direct the e-mail message as follows:

- Direct the e-mail message to a queue, to wait to be handled by a user.
- Discard the e-mail message, providing a site-defined discard reason (see [Section 14.2.2, "Configuring a Discard reason", on page 248](#)).
- Auto-respond to the e-mail message.

After an e-mail message is enqueued, it is the responsibility of the queue to find an available user who is eligible to handle the e-mail message.

E-mail messages will be automatically discarded by the OpenScape Contact Center E-mail Server under the following circumstances:

- The e-mail message does not contain a From address.
- The From address contains the text "postmaster" or "microsoftexchange".
- The To address does not contain an e-mail address that has been configured as a destination.

### 14.1.1 Working with categories

You can route an e-mail message, or base subsequent workflow processing, on the presence of keywords in the e-mail message. This is accomplished with two types of OpenScape Contact Center resources:

- **Categories** – A category consists of one or more keyword/component pairs. For details on how to set up categories, see [Section 14.2.1, "Configuring an e-mail category", on page 247](#).
- **Category Decision components** – A Category Decision component tests an e-mail message for a match against one or more category criteria and passes execution to the next component based on the first criteria match it finds. Each criterion is a logical

expression defining a condition based on categories that apply to the e-mail message. For details on how to configure Category Decision components, see the *Manager Help*.

---

**NOTE:** You can use confidence levels to create more precise categorization. For details, see [Section 14.3.5, "Displaying the e-mail confidence levels", on page 259](#).

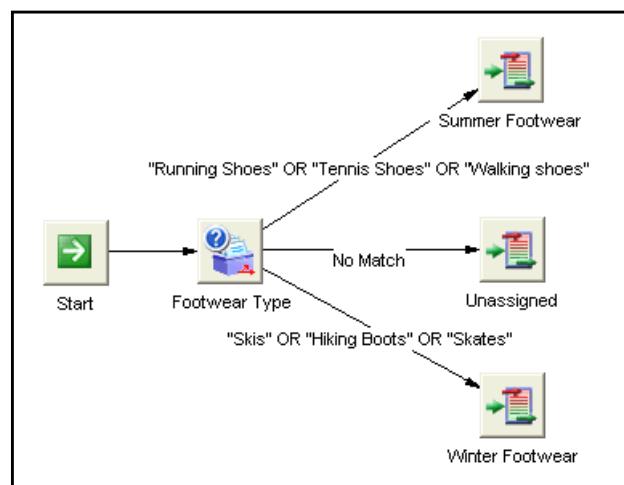
---

For example, in a contact center that sells footwear, you may have queues specializing in winter and summer footwear. You could set up categories according to types of footwear you sell:

- Skis
- Skates
- Hiking boots
- Tennis shoes
- Running shoes
- Walking shoes

You could then use a Category Decision component to route e-mail messages as follows:

- If the e-mail message contains any of the keywords Skis, Skates, or Hiking boots, direct the contact to the Winter Sportswear queue.
- If the e-mail message contains any of the keywords Tennis shoes, Running shoes, or Walking shoes, direct the contact to the Summer Sportswear queue.
- Contacts for which no specific match was found could be directed to an **Unassigned** queue.



#### 14.1.2 Other e-mail workflow components

In addition to the Category Decision component, the following e-mail components can also be used in e-mail workflows:

- **Auto-acknowledgment** – You can use an Auto-acknowledgment component to send an automatic reply to a customer's e-mail message using the contents of an Auto-acknowledgment template.
- **Auto-response** – You can use an Auto-response component to send an automatic reply to a customer's e-mail message using the contents of a Response template.
- **Auto-suggestion** – You can use an Auto-suggestion component to create a draft reply to a customer's e-mail message using the contents of a Response template.
- **Discard** – You can use a Discard component to discard an e-mail message for a selected reason.
- **Reply Decision** – You can use a Reply Decision component to determine the routing of an e-mail message based on whether or not the e-mail message is a reply to an existing conversation.

Many of these components are built from site-defined templates. For more information, see [Section 14.2.3, “About e-mail templates”, on page 249](#).

For details on how to configure these components, see the *Manager Help*.

## 14.2 Configuring the e-mail resources

You must configure various resources that impact the e-mail feature.

---

**NOTE:** Your initial e-mail configuration is typically set up by your service representative. For information on the setup tasks, see the *System Management Guide*.

---

## 14.2.1 Configuring an e-mail category

A category defines the keywords that OpenScape Contact Center searches for in an incoming e-mail message to help route the e-mail message to the appropriate queue. You can define a category to search for the keywords in the subject of the e-mail message, in the body, or both.

For example, you can configure two categories as follows:

- If the keyword “sales” is found in the subject or body, the e-mail message is associated with the sales category.
- If the keywords “support”, “service”, or “help” are found in the subject or body, the e-mail message is associated with the support category.

---

**NOTE:** To create or change an e-mail category, you must have Full or Modify access, respectively, for the **Categories** Manager permission.

---

You can use categories with Category Decision components in a workflow, as a step in routing an incoming e-mail message. For a detailed introduction to categories and the use of categories in workflows, see [Section 14.1.1, “Working with categories”, on page 244](#).

### To configure a category:

1. On the **File** menu, point to **New**, then **Design Center**, then **E-mail**, and then click **Category**.
2. On the **General** tab, under **Details**, do the following:
  - In the **Name** box, type a unique name for the category.
  - In the **Description** box, type a description for the category.

## Working with the e-mail feature

### Configuring the e-mail resources

3. Click the **Criteria** tab.



4. For each keyword that you want to define, do the following:

- In the **Search In** column, click the item and select the message location from the list. You can choose **Subject**, **Body**, or **Subject or Body**.
- In the **Search for the words** column, type the keyword that you want to search for.
- Press **TAB** or **ENTER** to create another entry.

5. Click **OK**.

### 14.2.2 Configuring a Discard reason

A Discard reason is an explanation that the users and workflows can specify when discarding an e-mail message.

The Manager application provides a set of predefined Discard reasons. You cannot delete or rename these Discard reasons, although you can modify their descriptions.

#### To configure a Discard reason:

1. On the **File** menu, point to **New**, then **Design Center**, then **E-mail**, and then click **Discard Reason**.
2. In the **Name** box, type a unique name for the Discard reason.
3. In the **Description** box, type a description for the Discard reason.
4. Click **OK**.

### 14.2.3 About e-mail templates

Workflow processing for e-mail messages can include automatic responses, as well as suggested drafts created automatically for subsequent processing. These are built, programmatically, using templates. Prolog and Signature templates can be assigned at the queue level (see [Section 10.3.4, "Configuring the queue overrides", on page 211](#)).

You can configure the following five types of e-mail templates:

- **Prolog** – This type of template is inserted at the beginning of a reply e-mail message. For example, "Please do not remove the ticket number in the subject line above. The ticket number enables us to track responses that you send us in the context of your original message."

- **Signature** – This type of template is inserted at the end of a reply e-mail message. For example:

Sales - My Company  
sales@mycompany.com  
Visit our Web site at [www.mycompany.com](http://www.mycompany.com)

- **Response** – This type of template is selected when you configure an Auto-response or an Auto-suggestion component. It can be used in the following ways:

- To send an automatic response to an e-mail message when the customer asks a simple question that can be answered automatically. For example, "Thank you for contacting mycompany.com. For information on how to order our products, visit [www.mycompany.com/products](http://www.mycompany.com/products)."
- To insert suggested text into a reply e-mail message when the customer asks a frequently asked question.

You must associate a Response template with one or more queues. When a user responds to an e-mail message routed by one of the associated queues, this template will be used to create the draft e-mail message. The E-mail Server creates the draft e-mail message based on the specified Response template; however, it uses the reply prefix, conversation ID label, and original message text label configured in the queue. If these items are not configured in the queue, the E-mail Server will use the default values configured at the system level.

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### Configuring the e-mail resources

- **Auto-acknowledgment** – This type of template is selected when you configure an Auto-acknowledgment component. It is used to send an automatic response to an e-mail message to let the customer know that their message has been received. For example “Thank you for contacting mycompany.com. A qualified agent is investigating your inquiry and will contact you shortly.”
- **New Message** – This type of template is inserted when a user creates a new e-mail message.

#### 14.2.4 Configuring an e-mail template

There are five different types of e-mail templates that you can configure (see [Section 14.2.3, “About e-mail templates”, on page 249](#)). Some templates are used when users reply to e-mail messages, while others are used by the system to send automatic responses to e-mail messages.

---

**NOTE:** To create or change an e-mail template, you must have Full or Modify access, respectively, for the associated Manager permission.

---

E-mail templates can be created in both HTML and plain text. HTML format allows you to include special formatting, such as bold text, bulleted and numbered lists, pictures, and URLs. The system assigns a template to an incoming e-mail message based on the format of the original message. We therefore recommend that when you create a new template, you configure both the HTML and the plain text sections of the template.

E-mail templates have a maximum size of 500 KB.

##### To configure an e-mail template:

1. On the **File** menu, point to **New**, then **Design Center**, then

**E-mail**, and then click one of the template types:

- **Prologs**
- **Signatures**
- **Responses**
- **Auto-acknowledgments**
- **New Messages**

2. Under **Details**, do the following:
  - In the **Name** box, type a unique name for the template.
  - In the **Description** box, type a description for the template.
3. To create HTML content, in the **Message-HTML** box, do any of the following:
  - Type the required text. You can change the formatting of the text. For details, see the *Manager Help*.
  - Insert a URL. For details, see the *Manager Help*.
  - Insert a logo or picture. For details, see the *Manager Help*.
4. To create content in plain text format, in the **Message-Text** box, type a message.
5. For Response templates only, click the **Queues** tab, and then select the queues for which this Response template can be used. When a user responds to an e-mail message routed by one of the selected queues, this template can be selected to create the draft response text.
6. Click **OK**.

#### 14.2.5 Configuring an e-mail destination

All e-mail messages are stored in a single mailbox on the corporate e-mail server. If you want to have more than one destination e-mail address for your contact center (such as, *sales@company.com* and *support@company.com*), you must configure the e-mail destinations you want to use.

---

**NOTE:** To create or change an e-mail destination, you must have Full or Modify access, respectively, for the associated Manager permission.

---

---

**NOTE:** You specify the default e-mail addresses in the Options dialog box. For details, see [Section 14.3.1, “Configuring the default e-mail routing strategy, queue, and addresses”, on page 254](#).

---

For each destination you create, you can specify whether the destination will be available for selection by a user when sending a new outgoing e-mail message. When this option is enabled, the destination

## Working with the e-mail feature

### Configuring the e-mail resources

appears in the From list of an outgoing e-mail message. You can also specify whether the destination is to be monitored so that you can gather statistics and report on the destination.

When you are modifying an existing e-mail destination, you can change only the name and description of the destination. You cannot change the actual destination. If you need to change the destination, you must delete the e-mail destination and create a new one.

#### To configure an e-mail destination:

1. On the **File** menu, point to **New**, then **Design Center**, then **E-mail**, and then click **Destination**.
2. On the **General** tab, under **Details**, do the following:
  - In the **Name** box, type a unique name for the destination.
  - In the **Description** box, type a description for the destination.
  - In the **E-mail address** box, type the destination e-mail address.
  - In the **From text** box, type an alias for the destination e-mail address. This alias appears in the From box when a user replies to an e-mail message.
  - To gather statistics for this destination for reporting purposes, select the **Monitored** check box. When you select this option, the **Reports** tab becomes active.
3. If you selected the **Monitored** check box, click the **Reports** tab and select the check box for each report that you want to display data about this destination. The list contains only the reports you own, or reports that are owned by users you can monitor.
4. Click **OK**.

## 14.2.6 Configuring a monitored source for e-mail

To gather statistics for a particular e-mail source, you must configure the source in OpenScape Contact Center so that it can be monitored.

---

**NOTE:** To create or change a monitored source for e-mail, you must have Full or Modify access, respectively, for the associated Manager permission.

---

---

**NOTE:** When you are modifying an existing monitored source, you can change only the name and description of the source. You cannot change the actual source. If you need to change the source, you must delete the monitored source and create a new one.

---

### To configure a monitored source for e-mail:

1. On the **File** menu, point to **New**, then **Design Center**, then **E-mail**, and then click **Monitored Source**.
2. On the **General** tab, under **Details**, do the following:
  - In the **Name** box, type a unique name for the source.
  - In the **Description** box, type a description of the source.
  - In the **Source** box, type the e-mail address you want to monitor.
3. Click the **Reports** tab.
4. Under **Include this source in these reports**, select the check box for each report that you want to display data about this source. The list contains only the reports you own, or reports that are owned by users you can monitor.
5. Click **OK**.

## 14.3 Configuring the e-mail options

Use the e-mail options to configure the default settings for the e-mail feature. For details, see the following topics:

- [Section 14.3.1, “Configuring the default e-mail routing strategy, queue, and addresses”, on page 254](#)
- [Section 14.3.2, “Configuring the e-mail error queue settings”, on page 256](#)
- [Section 14.3.3, “Configuring the e-mail routing schedule”, on page 256](#)
- [Section 14.3.4, “Configuring the e-mail message settings”, on page 258](#)
- [Section 14.3.5, “Displaying the e-mail confidence levels”, on page 259](#)

---

**NOTE:** To configure any of the e-mail options, you must have Full or Modify access for the associated Manager permission.

---

### 14.3.1 Configuring the default e-mail routing strategy, queue, and addresses

You must specify the following defaults for the e-mail feature:

- **Routing strategy workflow** – The routing strategy workflow that is initially used to route all e-mail messages in the contact center. You can configure the default routing strategy workflow to link to subsequent routing strategy workflows, if required.
- **Queue** – The queue that you want to use as the default option for the no match found (\*) entry in a Destination Table component.
- **Incoming e-mail address** – The default e-mail destination for all incoming e-mail messages.

Before configuring these settings, be sure to create the routing strategy workflow (see [Section 9.4, “Configuring a routing strategy workflow”, on page 171](#)), queue (see [Section 10.3, “Configuring a queue”, on page 202](#)), and e-mail destinations (see [Section 14.2.5, “Configuring an e-mail destination”, on page 252](#)) that you want to use as the defaults.

**To configure the default e-mail routing strategy, queue, and addresses:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **E-mail**.
3. On the **General** tab, under **Default**, do the following:
  - In the **Routing strategy** list, select the e-mail routing strategy you want to use to initially route all e-mail messages.
  - In the **Queue** list, select the e-mail queue that you want to use as the default option for the no match found (\*) entry in a Destination Table component.
  - In the **Incoming e-mail address** list, select the e-mail destination that you want to use as the default e-mail address for all incoming e-mail messages.
  - In the **Outgoing e-mail address** list, select the e-mail destination that you want to use as the default e-mail address in the From list when a user creates an outgoing e-mail message. Only the e-mail destinations for which you have selected the **Available for outgoing** option are available in the list. If you select **<None>**, the user will be forced to select a From address before sending the e-mail message.
4. Click **OK**.

### **14.3.2 Configuring the e-mail error queue settings**

The error queue is the queue to which e-mail messages are routed in the case of recoverable system errors. Recoverable system errors are errors generated by the OpenScape Contact Center servers that cannot be handled by the **Exit on error** option provided in some of the workflow components. If the system detects a recoverable system error in a routing strategy workflow, the e-mail message is routed to the error queue where it can then be routed to an appropriate user.

**To configure the e-mail error queue:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **E-mail**.
3. On the **General** tab, under **Error**, do the following:
  - In the **Queue** list, select the queue to which contacts are directed in the case of recoverable errors.

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### Configuring the e-mail options

- In the **Description** box, type a description for the error queue.

4. Click **OK**.

### 14.3.3 Configuring the e-mail routing schedule

The e-mail routing schedule restricts the hours of operation during which e-mail messages can be sent and received within the contact center. You can configure the default schedule, as well as exceptions to the default schedule.

#### To configure the e-mail routing schedule:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **E-mail**.
3. On the **General** tab, under **Schedule**, click **Edit Schedule**.
4. In the **E-mail Routing Schedule** dialog box, double-click the day you want to configure, and then edit the active time range for the day.

---

**NOTE:** You can also drag the start or end point of an active range to change the range.

---

5. Optionally, click the **Exceptions** tab to create an exception to the default schedule. An exception overrides the schedule for the entire day.
  - a) On the calendar, click the day for which you want to schedule an exception, for example, a national holiday. The **Default** row shows the default schedule for that day.
  - b) Select the **Override** check box.
  - c) In the **Override** row, double-click a cell, edit the active time range for the override schedule, and then click **OK**.
6. Use the **Summary** tab to view the schedule by status or by day of the week.
  - To see the days and times when the schedule is active or inactive, expand **By Status**, and then click **Active** or **Inactive**, respectively.
  - To see the schedule for that day, expand **By Day**, and then click the day of the week.

- To see the configured exceptions to the default schedule, click the **Exceptions** folder.

7. Click **OK**.

#### 14.3.4 Configuring the e-mail message settings

You can configure the default prolog, signature, labels and so on, for e-mail messages.

Before you begin, you must create the Prolog and Signature templates that you want to use in your e-mail messages (see [Section 14.2.4, "Configuring an e-mail template", on page 250](#)).

##### To configure the e-mail message settings:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **E-mail**.
3. Click the **Settings** tab.
4. Under **E-mail Message Settings**, do the following:
  - In the **Prolog** list, select the Prolog template that you want to use as the default prolog to an e-mail message.
  - In the **Signature** list, select the Signature template that you want to use as the default e-mail signature.
  - In the **Original message label** box, type the text that you want to appear above the original e-mail message when the user replies to an e-mail message, for example, **Original Message:**.
  - In the **Conversation ID label** box, type the text that you want to appear in front of the Conversation ID when the user replies to an e-mail message. The Conversation ID is an identifier inserted by the OpenScape Contact Center E-mail Server to identify the message thread.
  - In the **Reply prefix** box, type the text that you want to appear at the beginning of the Subject line when the user replies to an e-mail message, for example, **Re:**.

## Working with the e-mail feature

### Configuring the e-mail options

5. Under **Deferred E-mail Messages**, do the following:
  - In the **Maximum number** box, type or select the maximum number of e-mail messages that can be deferred by each user. This number can be exceeded when e-mail messages are automatically deferred by the system.
  - In the **Automatic defer time** box, type or select the amount of time in days, hours and minutes, after which an active e-mail message is automatically deferred. When an e-mail message is automatically deferred, the user is placed in Unavailable routing state and the draft response (if one exists) is automatically saved.
  - In the **Maximum defer time** box, type or select the maximum amount of time in days, hours and minutes, for which an e-mail message can be deferred. After this time has expired, the e-mail message is automatically requeued by the OpenScape Contact Center E-mail Server.
6. Under **Consulted E-mail Messages**, in the **Maximum consult time** box, type or select the maximum amount of time in days, hours and minutes, for which an e-mail message can be sent for external consultation. After this time has expired, the e-mail message is automatically requeued by the OpenScape Contact Center E-mail Server.

---

**NOTE:** When a user externally consults on an e-mail message, the reply is reserved for the user who initiated the consultation, and will be routed to that user ahead of all other contacts regardless of their priority in the queue.

---

---

**IMPORTANT:** Since the OpenScape Contact Center E-mail Server does not filter the e-mail messages for viruses, the corporate e-mail server should provide virus protection.

---

7. Click **OK**.

### 14.3.5 Displaying the e-mail confidence levels

You can choose to display confidence levels that are associated with e-mail categories. Confidence levels are used to express a level of certainty. They provide an additional and more precise means of categorizing e-mail messages for subsequent routing to the

appropriate queue. When you turn on confidence levels, you can specify a confidence level for each e-mail category that you use to configure an expression in a Category Decision component.

---

**IMPORTANT:** Displaying e-mail confidence levels is a one-way operation. The system cannot be converted back after it has been changed.

---

The E-mail Server uses a default interface to categorize incoming e-mail messages. When displaying e-mail confidence levels, we recommend the use of a custom categorizer. The confidence levels returned by the default categorizer are simply occurrence ratios – they are not technically confidence levels. An occurrence ratio is calculated as the total number of occurrences in the e-mail message of any keywords defined for the category, divided by the total number of occurrences in the e-mail message of all keywords defined for any category. For example, if the sales category is found two times within an e-mail message, and three other categories are found within the e-mail message, the confidence level will be returned as 2/5 or 40%. For this reason, we recommend that you do not display confidence levels when using the default categorizer.

Custom categorizers are in the form of a .dll file.

---

**NOTE:** For more information in this area, contact your service representative.

---

#### To display confidence levels:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **E-mail**.
3. Click the **Advanced** tab.
4. Under **Confidence Levels**, click **Display Confidence Levels**.
5. In the **Enable Confidence Levels** dialog box, under **Do you want to show confidence levels?**, select **Yes**, and then click **OK**.
6. When the system prompts you to confirm that you want to enable confidence levels, click **Yes**. The system turns on confidence levels.
7. Under **Categorization**, select **Use custom categorizer**, and then specify the path and file name of the .dll file you want to use. You can click **...** to locate the file you want to use.
8. Click **OK**.

## 14.4 Conducting an e-mail history search

You can generate a list of e-mail messages that have been handled by the contact center over a specified time interval. You can search by e-mail message state, as well as by more specific parameters such as the Conversation ID, the handling user, the source or destination e-mail address, or the subject line. The resulting list allows you to open, view, and potentially resend the e-mail messages.

---

**NOTE:** To conduct an e-mail history search, you must have the **Perform e-mail history searches** Manager permission.

---

**To conduct an e-mail history search:**

1. On the **Actions** menu, click **E-mail History Search**.
2. Under **Date and Time**, do the following:
  - In the **Start** area, select the start date and time for the interval the search is to cover.
  - In the **End** area, select the end date and time of the interval.
3. Under **Status**, select the check box for each e-mail message state you want to search for.
4. Optionally, under **Advanced Parameters**, do the following for each parameter you want to use to refine your search:
  5. Click a cell in the **Parameter** column and select one of the options from the list.
  6. In the **Value** column, type or select the value that corresponds to the Parameter you selected. For example, if you select **Subject Line**, type the text that appears in the subject line of the e-mail messages you want to search for.
7. On the **Actions** menu, click **Find Now**.

---

**NOTE:** Email History Search performs the search on the original emails and not on the whole conversation history (for example, Externally forwarded e-mails)

---

# 15 Configuring other global options

An OpenScape Contact Center configuration includes a number of options (such as application settings, intervals, calculations, and scheduled events) that impact routine operation, reporting, and the level of service experienced by customers. Initially, most customers start by using the default settings for many of these options, but you can reconfigure the settings at any time. You configure the settings globally, although you can override some settings in queues and routing strategy workflows.

---

**IMPORTANT:** Contact your service representative before making significant changes to the threshold and interval settings configured in your database.

---

Some of the global options are described in the relevant chapter (for example, routing options are described in [Chapter 8, "Routing"](#)), but the remaining options are described in this chapter.

## 15.1 Configuring the personal options

You can configure several personal options, including:

- The appearance and behavior of the Manager application, such as the display of the Index bar.
- The display of system messages in the Messages window and in the status bar. The status bar is located at the bottom of the main Manager application window.
- The notification method used to indicate when a threshold in a real-time or cumulative report is reached.
- The default user template to be used when creating a new user. For more information on user templates, see [Section 4.2, "About user templates", on page 43](#).

You can also configure the confirmation options (see [Section 15.1.1, "Configuring the confirmation options", on page 263](#)).

## Configuring other global options

### Configuring the personal options

#### To configure the personal options:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Personal**.
3. On the **General** tab, under **Show**, select the check boxes for the items you want to show:
  - **Index bar** – Displays the Index bar, which allows you to select from a subset of items in a list. To display the letters on the Index bar that have entries associated with them in bold text, select the **Display active Index bar letters in bold** check box.
  - **ToolTips** – Displays the function of the toolbar buttons in the Manager application window when you hold your mouse pointer over the button.
  - **Record hints** – Displays a description of the selected record. Record hints are displayed above the right pane in the main Manager application window.
4. Under **Messages**, do the following:
  - To specify the length of time system messages are displayed in the status bar, type or select the number of seconds in the **Hide status bar messages after** box.
  - To have the application display the system messages in a separate window when they occur, select the **Display System Message window when new messages occur** check box. If you do not select this option, the system messages are recorded, but the window does not open.

---

**NOTE:** To view the System Messages window, on the **View** menu, click **System Messages**.

---

5. Under **When a Threshold is Reached**, select the **Flash title bar or taskbar icon if Real-time Viewer is hidden or minimized** check box if you want the Real-time Viewer to flash when a threshold is reached. If the Real-time Viewer is hidden, the title bar will flash, and if the Real-time Viewer is minimized, the taskbar icon will flash.
6. Under **Default User Template**, in the **Select template** list, select the user template that you want to use as the default. The default template is used when you create multiple users and a user template is not specified. For details, see [Section 4.2.5, “Creating multiple users by importing a text file”, on page 50](#).
7. Click **OK**.

### 15.1.1 Configuring the confirmation options

You can configure the application to prompt you for confirmation when you perform various actions such as deleting a record or exiting the application.

**To configure the confirmation options:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Personal**.
3. Click the **Confirmations** tab.
4. Under **Show Confirmations When**, select the check box for each action that you want the Manager application to prompt you for:
  - **Deleting records** – The application will ask if you are sure you want to delete the record (that is, a resource or definition in one of the application centers).
  - **Exiting the Manager application** – The application will ask if you are sure you want to exit the application.
  - **Removing a report from a report view** – The application will ask if you are sure you want to remove the report from the report view.
  - **Historical reports were completed** – When you log on, the application will inform you that historical reports were completed while you were logged off.
  - **Report changes cause thresholds to be deleted** – When you change a report (that is, change the report type, the resource reported by, the resource selected by, or the type of activity reported on), the application will inform you that the currently defined thresholds for the report will be deleted as a result of the change.
  - **Report was successfully submitted** – The application will inform you that the report was successfully submitted to the Scheduler.
  - **Background operations were completed** – The application will inform you when a background operation (such as deleting multiple users) is complete.
5. Click **OK**.

## Configuring other global options

Configuring the advanced options

## 15.2 Configuring the advanced options

You can configure various advanced user-related options for the Manager application.

### 15.2.1 Configuring the diagnostic settings

You can configure the Manager application to log messages to a diagnostic file, which your administrator or service technician can use to track the operations of the applications and resolve problems, such as why an application disconnected from an OpenScape Contact Center server. You can turn diagnostic logging on and off, and also configure the contents of the diagnostic file. You should need to configure the contents only if problems occur within your contact center.

#### To turn diagnostic logging on:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Advanced**.
3. Under **Diagnostics**, select the **Turn diagnostic logging on** check box.
4. Click **OK**.

#### To configure the diagnostic file contents:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Advanced**.
3. Under **Diagnostics**, click **Details**. The **Diagnostics** dialog box is displayed.

---

**NOTE:** The diagnostic files are saved to the folder specified in the **Location** box.

---

4. Under **Levels**, select the check box for each diagnostic level you want to include in the file:

---

**NOTE:** By default, when you start any application, the **Event**, **ActiveX Component**, and **Function Entry/Exit** diagnostic levels are selected.

---

- **Warning** – Saves messages related to errors that do not break down the connectivity.
- **Information** – Saves messages related to normal connectivity operations.
- **Event** – Diagnostic trace of event.
- **ActiveX Component** – Saves messages related to OCX operations.
- **Function Entry/Exit** – Diagnostic trace of the code workflow.

5. Click **OK**.

## 15.2.2 Changing the password

An administrator will provide you with a user name and password for logging on to the Manager application. For security, you should change your password the first time you log on, and then change it periodically to conform to security policies at your site. This guideline also applies to the default Master Administrator password. For more information on the Master Administrator user account, see [Section 3.2.1, "About the Master Administrator", on page 21](#).

### To change the password:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **User Settings**, click **Advanced**.
3. Under **Password**, click **Change**.
4. In the **Change Password** dialog box, do the following:
  - a) In the **Old Password** box, type your current password.
  - b) In the **New Password** box, type your new password.
  - c) In the **Confirm new password** box, retype your new password to verify that you entered it correctly.
  - d) Click **OK**.

## Configuring other global options

Configuring the system options

5. Click **OK**.

### 15.2.3 Restoring the default settings

You can restore certain user settings, such as custom shortcuts, toolbars and colors, to the default settings provided when you first installed the application.

**To restore the default settings:**

1. On the **Tools** menu, click **Options**.
2. Click the **Advanced** tab.
3. Under **Default Settings**, click **Restore**.
4. Under **Features**, do the following:
  - a) Select the check boxes for the features you want to restore to the default settings.
  - b) Clear the check boxes for the features that you do not want to restore to the default settings.
  - c) Click **OK**.
5. Click **OK**.

## 15.3 Configuring the system options

You can configure various system options related to the contact center.

---

**NOTE:** To configure any of the system options, you must have Full or Modify access for the associated Manager permission.

---

### 15.3.1 Configuring the general system settings

You can configure general system settings, such as the information related to the contact center's site and technical support, and the location of the ShareData folder.

The ShareData folder is a repository for storing and transferring various items in the contact center, such as design databases, historical reports, .wav files, and XML data.

---

**IMPORTANT:** We strongly recommend that you do not change the default location of the ShareData folder. Locating the ShareData folder on a machine other than the main server machine can adversely affect system performance. If it is absolutely necessary to change the default location, it should be changed only by your service representative.

---

**To configure the general system settings:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **System**.
3. Under **Profile**, in the **Site** box, type the name of your contact center. This name appears on reports about the contact center, and when you monitor servers.
4. Under **Contact**, do the following:
  - In the **Name** box, type the name of the person responsible for the operation of the contact center. This person is usually the administrator who configures the OpenScape Contact Center database and provides technical support.
  - In the **Telephone number** box, type the telephone number for the person responsible for the operation of the contact center.
5. Under **ShareData**, in the **Location** box, type the path and name of the ShareData folder. This folder is usually located on the main server machine.
6. Under **360° Customer View**, check the **Enable** checkbox to activate the feature.
7. Click **OK**.

## Configuring other global options

Configuring the system options

### 15.3.2 Configuring the e-mail server settings

Incoming e-mail messages are routed through the corporate e-mail server to the OpenScape Contact Center E-mail Server. The corporate e-mail server and the OpenScape Contact Center E-mail Server communicate using the IMAP4 protocol. Message attachments are retrieved using separate IMAP4 and MIME functions.

Outgoing e-mail messages are distributed using an SMTP interface. This includes completed historical reports that are distributed as attachments to e-mail messages. For more information, see [Section 7.13.5, "Configuring the e-mail reports option", on page 143](#).

---

**IMPORTANT:** When you are connected to the production database, if you change the e-mail server settings, you will be required to restart the OpenScape Contact Center E-mail Server on the main server machine.

---

#### To configure the e-mail server settings:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **System**.
3. Click the **E-mail Settings** tab.
4. Under **Corporate IMAP Server**, do the following:
  - In the **Host name** box, type the host name (or FQDN) of the machine where the IMAP server resides.
  - In the **Port number** box, type the port number of the IMAP server.
  - To secure the connection, select the **Use TLS** check box.
  - In the **User name** box, type the user name needed to log on to the IMAP server, for example, OSCCEmail.
  - In the **Password** box, type the password needed to log on to the IMAP server.
  - In the **Confirm password** box, retype the password to confirm that you entered it correctly.

- In the **Maximum IMAP sessions** box, type the maximum number of allowed IMAP sessions. The value **0** means not limited.

---

**NOTE:** Set the parameter **Maximum IMAP sessions** to 20 if the e-mail server is Office365.

---

5. Under **Corporate SMTP Server**, do the following:

- In the **Host name** box, type the host name (or FQDN) of the machine where the SMTP server resides.
- In the **Port number** box, type the port number of the SMTP server.
- To secure the connection, select the **Use TLS** check box.
- In the **Authentication** list, select one of the following:
  - **None** – Do not use any authentication.
  - **Use IMAP settings** – Use the same user name and password specified for the IMAP server.
  - **Use settings below** – Use the user name and password specified in the following boxes. The following three options are available only if you select this option.
- In the **User name** box, type the name of the user needed to log on to the SMTP server.
- In the **Password** box, type the password needed to log on to the SMTP server.
- In the **Confirm password** box, retype the password to confirm that you entered it correctly.
- In the **Heartbeat e-mail address** box, type a valid e-mail address that the SMTP server must be capable of using as the From address when creating a new e-mail message (for example, the outgoing e-mail address specified in the general e-mail options).

## Configuring other global options

Configuring the system options

- In the **Message rate limit** box, type the maximum number of outgoing messages that can be processed per minute. You can enter a value between 0 and 1000. The default value is 0 and indicates that there is no limit.

---

**IMPORTANT:** We strongly recommend that you do not change the message rate limit from the default value of 0 unless you are using Microsoft Office 365 as the corporate e-mail server.

---

6. Click **OK**.

### 15.3.3 Configuring the Web server settings

The Web Interaction Server communicates with the corporate Web server to provide a direct interface for Web callbacks.

This section describes how to configure an unsecured port and a secured (TLS-enabled) port that the Web Interaction Server can use to connect to the corporate Web server. You have the option to configure one port or both ports.

---

**IMPORTANT:** When you are connected to the production database, if you change either of the port numbers, you will be required to restart the Web Interaction Server on the main server machine.

---

---

**NOTE:** Ensure that the port numbers you configure in the Manager application match the port numbers configured on the corporate Web server. For details, see the *System Management Guide*.

---

If you want to secure the connection between the Web Interaction Server and the corporate Web server, the system can be configured to use TLS certificate-based authentication.

To complete the TLS configuration, you must also do the following:

- Install a TLS certificate on the main server machine. For details, see the *Installation Guide*.
- Enable TLS security on the corporate Web server. For details, see the *System Management Guide*.
- Select a TLS-enabled port for the Web connection. For details, see [Section 13.3.3, "Configuring the Web callback settings", on page 240](#).

---

**NOTE:** We recommend that you do not select an TLS-enabled port until all other Web Interaction Server configurations are complete.

---

**To configure the Web server settings:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **System**.
3. Click the **Web Settings** tab.
4. Under **Port Settings**, do the following:
  - In the **Port number** box, type the number of the unsecured port that the Web Interaction Server uses to communicate with the corporate Web server.
  - In the **Port number (TLS)** box, type the number of the TLS-enabled port that the Web Interaction Server uses to securely communicate with the corporate Web server.
5. Click **OK**.

#### **15.3.4 Configuring the enhanced security option**

The enhanced security feature allows you to restrict access to the following resources to authorized personnel only:

- Users
- User templates
- Groups
- Departments
- Locations

## Configuring other global options

Configuring the system options

- Profiles
- Call Director components (when Call Director is licensed)
- .wav files

When the option is enabled, the dialog boxes related to the applicable resources contain an additional Security tab where you can configure the security settings for the resource.

When you first enable the enhanced security option, only the Master Administrator user is able to access the applicable resources. For details on the Master Administrator user, see [Section 3.2.1, "About the Master Administrator", on page 21](#).

### To configure the enhanced security option:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **System**.
3. Click the **Advanced** tab.
4. Under **Enhanced Security**, select or clear the **Enable** check box, as required.
5. Click **OK**.

## 15.3.5 Configuring the network communication settings

You can configure the network communication settings for the OpenScape Contact Center components to use the Transport Layer Security (TLS) 1.2 protocol for encryption.

### To configure the network communication settings:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **System**.
3. Click the **Advanced** tab.
4. Under **Network Communications**, do the following:
  - a) In the **Encryption setting** box, select one of the following:
    - **Disabled** – Rejects any attempt to use TLS 1.2 encryption. The network communication will be unencrypted.
    - **Allowed** – Accepts any attempt to use TLS 1.2 encryption. The network communication will be encrypted if requested.

- **Required** – Only accepts requests to use TLS 1.2 encryption for network communication.

---

**NOTE:** The **Required** encryption setting is not supported when using the OpenScape Contact Center IVR API integration.

---

b) In the **Cipher suite** box, select one of the following:

- TLS\_RSA\_WITH\_AES\_128\_GCM\_SHA256
- TLS\_RSA\_WITH\_AES\_256\_GCM\_SHA256
- TLS\_ECDHE\_RSA\_WITH\_AES\_128\_GCM\_SHA256
- TLS\_ECDHE\_RSA\_WITH\_AES\_1256\_GCM\_SHA256

---

**NOTE:** The default encryption setting is **Disabled** and the default cipher suite is **TLS\_RSA\_WITH\_AES\_128\_GCM\_SHA256**.

---

5. Click **OK**.

## 15.4 Configuring the application options

The application options affect the operation of the Manager application. When you configure these options, the settings are implemented for all users in the contact center.

You can configure:

- The interval at which OpenScape Contact Center automatically refreshes information in the Manager application.
- The time-out interval for the Master Administrator account in the Manager application.
- The Broadcaster settings. For details, see [Section 15.5, “The Contacts Waiting Indicator shows reserved contacts if the reserved contact is for the user.Configuring the contact lookup options”, on page 276](#).

---

**NOTE:** To configure any of the application options, you must Full or Modify access for the associated Manager permission.

---

## Configuring other global options

Configuring the application options

### To configure the application options:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Application**.
3. Under **Contacts Waiting Indicator**, do the following for each media type:
  - In the **On** box, type the minimum number of contacts required to turn the indicator on.
  - In the **Slow flash** box, type the minimum number of contacts required to make the indicator flash slowly.
  - In the **Fast flash** box, type the minimum number of contacts required to make the Indicator flash quickly.
4. To use a key position on the telephone for the Contacts Waiting Indicator, select the **Use key position on telephone keypad** check box, and then in the **Position** box, type the integer that represents the key position you want to use. The default value is 25. or To select a different key position, refer to the communication platform documentation. Ensure that you do not select a key position that is already assigned to a communication platform feature.
5. Under **Manager Settings**, in the **Real-time refresh interval** box, type or select the number of seconds between data updates in the Manager application. Various statistics used in real-time and cumulative reports and visible properties in the application are refreshed at the specified interval. The default value is 30 seconds.

---

**NOTE:** When setting the Manager real-time refresh interval, you should consider the system hardware and the volume of contacts in the contact center. For example, you should not use a low refresh rate such as 5 seconds if your hardware meets only minimum requirements and you have high contact volume. A refresh rate of 10 seconds or even 15 seconds will improve system performance.

---

6. Under **Manager Settings**, in the **Time-out** box, type or select the number of minutes of inactivity that can elapse before the Master Administrator account is automatically logged off. The default value is 60 minutes.
7. Click **OK**.

### 15.4.1 About the Contacts Waiting Indicator

The Contacts Waiting Indicator enables the user to gauge the number of contacts waiting for the user. It has three states: on, slow flash, and fast flash. As the number of contacts waiting for the user increases, the indicator moves through the three states.

You can configure the Contacts Waiting Indicator for each media type. For example, if you configure the three states as 1, 5, and 10 contacts:

- The indicator will be bright constantly when the number of contacts waiting is between 1 and 4.
- The indicator will flash slowly when the number of contacts waiting is between 5 and 9.
- The indicator will flash quickly when the number of contacts waiting is higher than 10.

---

**NOTE:** The Contacts Waiting Indicator shows reserved contacts if the reserved contact is for the user.

---

## 15.5 Configuring the contact lookup options

You can configure the Manager application in order for the Agent Portal Web applications to search in a specified directory when a contact is received and try to match an element from the contact data to a selected directory field. The contacts in the directory that contain a matching field will be displayed on the Directory tab in the Contact Details window. This limits the contact data the user sees when a contact is received. Setting the search criteria appropriately can reduce the number of records that are searched. The response time will improve if the directory search is simple.

Before you begin, you must configure the directory that you want to search (see [Section 5.5, "Configuring a directory", on page 66](#)).

---

**NOTE:** To configure the contact lookup options, you must have Full or Modify access for the **Directories** Manager permission.

---

#### To configure the contact lookup options:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Contact Lookup**.

## Configuring other global options

Configuring the data management options

3. Under **Directory**, in the **Directory** list, select the directory to be searched for contact data. Only the directories that have been configured in the Manager application are displayed in the list.
4. Under **Search**, do the following:
  - a) In the **Media** box, select the media type for which you want to configure the search, for example, **Voice**.
  - b) Select the **Enable** check box.
  - c) In the **Directory field name to search** box, type the name of the directory field on which you want to search.
  - d) Select the contact data you want to compare to the specified database field name. You can choose one of:
    - **Source** of the contact.
    - **Destination** of the contact.
    - **Contact data key**, that is, a key in the contact data. If you choose **Contact data key**, type the name of the key from the contact data that contains the value that will be used in the search.

For example, if you want to search for all entries in the database where the field “Calling From” matches the source of the current contact, you would type the database field name that corresponds to the display name “Calling From” in the **Directory field name to search** box, and then select the **Source** option.

5. Click **OK**.

## 15.6 Configuring the data management options

You can configure the options related to the management of data in the contact center, including the data retention periods.

---

**NOTE:** To configure any of the data management options, you must have Full or Modify access for the associated Manager permission.

---

## 15.6.1 Configuring the data maintenance time

The data maintenance time is a specified time during the day when the application performs automatic data maintenance procedures. During this time, the system performs various tasks, such as calculating daily, weekly, and monthly statistics, and deleting information that has been kept longer than the specified data retention periods. You cannot create reports while the data maintenance procedures are being performed.

By default, the application is configured to export the existing administration data to a Microsoft Access database at data maintenance time. A new database, named according to the time the database was created, is exported at each data maintenance time and is saved in the AdministrationData folder in the ShareData folder. The last 30 databases are saved. These databases can be used by your service representative to troubleshoot problems with the system. The structure of these databases is identical to a design database.

To minimize the impact on contact center operations, you should configure data maintenance to occur when the contact center is closed or during its least busy period. Be sure to consider the time zones of remote locations. For details, see [Section 15.6.1.1, "Effect of different time zones on data maintenance", on page 279](#).

OpenScape Contact Center **To configure the data maintenance time:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Data Management**.
3. Under **Data Maintenance**, in the **Maintenance time** box, type or select the hour of the day when the system begins to perform data maintenance procedures. The minutes cannot be changed.
4. Ensure that the **Export administration data** option is selected.

---

**IMPORTANT:** The **Export administration data** option is enabled by default and should be disabled only under the direction of your service representative.

---

5. Click **OK**.

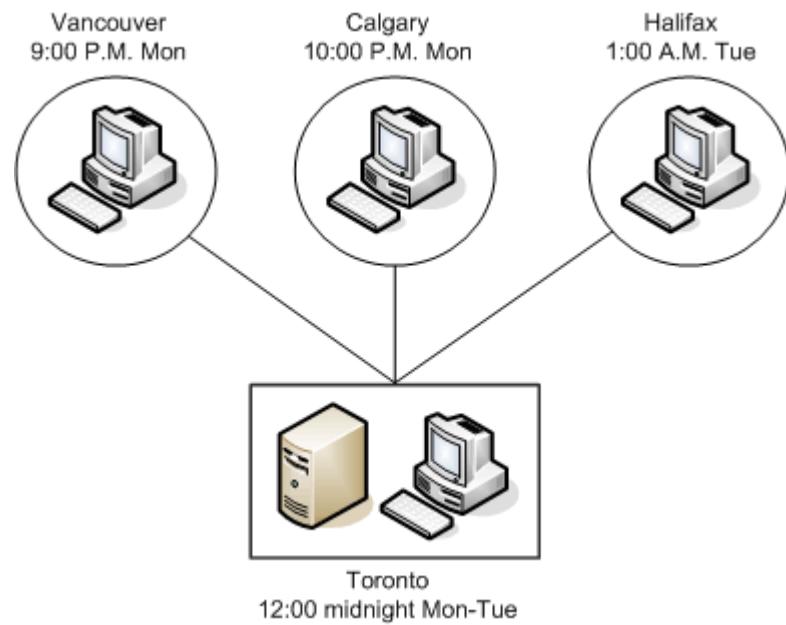
## Configuring other global options

Configuring the data management options

### 15.6.1.1 Effect of different time zones on data maintenance

The OpenScape Contact Center system allows you to run reports against different time zones. Because of this, we recommend that you ensure that the full day is complete at all locations that are in different time zones before data maintenance occurs. If the full day (or full week or full month) is not complete at all locations when the reporting statistics are calculated, reports that are based on the time zone of the user's location will not show any data for that day (or week or month). However, the data will be available the next day.

For example, in the following diagram, the main server machine is located in Toronto. If you schedule data maintenance to occur at 12:00 midnight (Monday- Tuesday) in Toronto, the day is not complete in Vancouver where it is only 9:00 P.M. Monday. In this case, the data for Monday will not be available in reports that are based on the time zone of a user whose location is Vancouver (specifically user, routing state reason, Wrap-up reason, and Post-processing reason historical reports). We recommend that you schedule data maintenance to occur after 3:00 A.M. Tuesday to ensure that the full day is complete in Vancouver.



## 15.6.2 Adding a data location

To ensure that the system has enough data storage capacity, you should check the total data usage, and use the values provided to help you determine if you need to add a new data location.

---

**NOTE:** The Data Locations and Total Database Usage group boxes appear only when you are connected to a production database.

---

In the Data Management options, on the General tab under Total Database Usage, the following values are displayed as a guideline:

- **Maximum allowed space** – This is the maximum disk space allowed for data storage. This value cannot be changed.
- **Allocated space** – This is the total amount of disk space currently allocated by the system for data storage.
- **Estimated required space** – This is the amount of disk space currently estimated to be required for data storage, based on the current system usage and the total of the configured retention periods.

The new data location must be an internal hard disk drive that is intended exclusively for OpenScape Contact Center data storage. Before you begin, you must ensure that the disk drive you want to add is already installed.

---

**NOTE:** The System Monitor application displays a message when there is not enough disk space available to store the data that will be generated over the next two weeks or less. The estimation is based on the configured retention periods and the current system usage. You can also configure a notification to this effect. For details, see [Section 5.3.5, "Configuring a notification"](#).

---

### To add a data location:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Data Management**.
3. On the **General** tab, under **Data Locations**, click **Add**.
4. In the **Add Data Location** dialog box, select the disk drive you want to use for additional data storage.
5. Click **OK**.

## Configuring other global options

Configuring the data management options

### 15.6.3 Deleting a data location

Before you can delete a specified OpenScape Contact Center data location, you must remove all data from the disk drive.

---

**NOTE:** The Data Locations and Total Database Usage group boxes appear only when you are connected to a production database.

---

**To delete a data location:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Data Management**.
3. On the **General** tab, under **Data Locations**, select the disk drive in the table that you want to delete.
4. Click **Delete**.

### 15.6.4 Configuring the retention periods for reporting data

You can configure how long to store various OpenScape Contact Center reporting statistics and the error log.

The reporting statistics are described as follows:

- **Detailed statistics** – Detailed statistics include detailed contact and user statistics, and contact data. The following reports use the detailed statistics: user and source activity reports, contact and source historical reports, queue by user historical reports, and user by queue historical reports.
- **15-minute statistics** – Historical reports with no interval, 15-minute intervals, and hourly intervals, are generated using the 15-minute statistics.
- **Daily statistics** – Historical reports with daily intervals are generated using the daily statistics.
- **Weekly statistics** – Historical reports with weekly intervals are generated using the weekly statistics.
- **Monthly statistics** – Historical reports with monthly intervals are generated using the monthly statistics.

Under Database Usage for Reporting, the following values are displayed as a guideline:

- **Maximum allowed space** – This is the maximum disk space allowed for reporting data storage. This value cannot be changed.
- **Allocated space** – This is the total amount of disk space currently allocated by the system for reporting data storage.
- **Estimated required space** – This is the amount of disk space currently estimated to be required for reporting data storage, based on the current system usage and the specified retention period.

---

**NOTE:** The Database Usage for Reporting group box appears only when you are connected to a production database.

---

**To configure the retention periods for reporting data:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Data Management**.
3. Click the **Reporting** tab.
4. Under **Retention Periods**, for each row in the table, click in the **Value** column and type a new value in the cell. You can also click  to specify the retention period using the Retention Period Converter dialog box.
5. Under **Database Usage for Reporting**, the application updates the value of the **Estimated required space** based on your changes.
6. Click **OK**.

## Configuring other global options

Configuring the data management options

### 15.6.5 Configuring the retention period for e-mail data

You can configure how long to store e-mail messages and contact information.

Under Database Usage for E-mail, the following values are displayed as a guideline:

- **Maximum allowed space** – This is the maximum disk space allowed for the storage of e-mail data. This value cannot be changed.
- **Allocated space** – This is the total amount of disk space currently allocated by the system for the storage of e-mail data.
- **Estimated required space** – This is the amount of disk space currently estimated to be required for the storage of e-mail data, based on the specified retention period.

---

**NOTE:** The Database Usage for E-mail group box appears only when you are connected to a production database.

---

#### To configure the retention period for e-mail data:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Data Management**.
3. Click the **E-mail** tab.
4. Under **Retention Period**, click in the **Value** column in the table, and type a new value in the cell. You can also click  to specify the retention period using the Retention Period Converter dialog box.
5. Under **Database Usage for E-mail**, the application updates the value of the **Estimated required space** based on your changes.
6. Click **OK**.

## 15.7 Configuring the statistics options

The options you specify for the statistics affect the user performance calculations in the Manager application.

---

**NOTE:** To configure any of the statistics options, you must have Full or Modify access for the associated Manager permission.

---

### 15.7.1 Configuring the service level interval

The service level interval is a target set for the contact center to help monitor performance. The service level interval is the target amount of time within which a contact should be answered. This means that a contact should not wait in queue longer than the time specified to be considered answered successfully. You set the service level interval globally for each media type in the contact center; however, you can override this setting for a specific queue.

The application uses the service level interval to calculate the service level for all queues that route OpenScape Contact Center contacts. The service level is defined as the number of successfully answered contacts divided by the total number of contacts. The application calculates the service level based on the chosen service level calculation formula.

**To specify the service level intervals:**

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Statistics**.
3. Under **Service Level Calculation**, for each **Media** type in the table, double-click the time and then type the time interval in which a user should be able to answer a contact. Note that the time interval for calls is in hours, whereas the time interval for callbacks and e-mail messages is in days.
4. Click **OK**.

## Configuring other global options

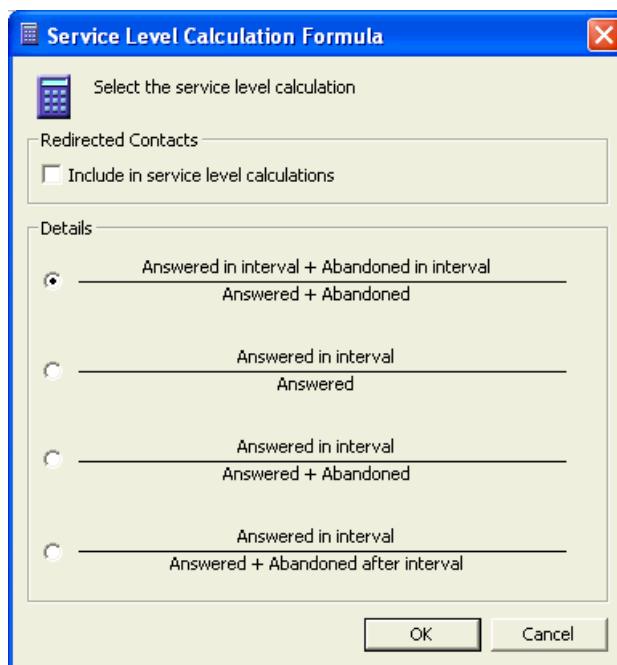
### Configuring the statistics options

#### 15.7.1.1 Choosing the service level calculation formula

The application uses the service level interval to calculate the service level for all queues that route OpenScape Contact Center contacts. The application calculates the service level using one of four formulas, each of which defines “successfully answered contacts” and “total number of contacts” differently.

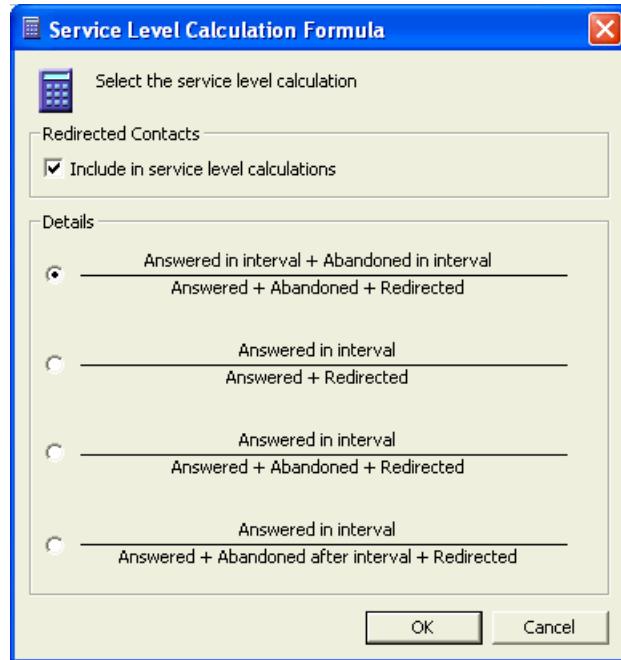
##### To choose the service level calculation formula:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Statistics**.
3. Click **Formula**.



4. In the **Service Level Calculation Formula** dialog box, under **Redirected Contacts**, select the **Include in service level calculations** check box if you want to include redirected contacts

in the formulas. Redirected contacts include calls redirected to an unmonitored device before being answered by a user, abandoned by the caller, or timed out.



5. Under **Details**, select the service level calculation formula you want to use to calculate the service level. For a description of the formulas, see [Section 15.7.1.2, "Service level calculation formulas", on page 290](#).
6. Click **OK**.

### 15.7.1.2 Service level calculation formulas

In the service level calculation formula, the *numerator* defines which contacts are considered successfully answered within the service level interval. The numerator can include:

- The number of contacts answered within the service level interval.
- The number of contacts abandoned within the service level interval. (You can consider these contacts successfully answered because it is difficult to answer a contact that is abandoned quickly.)

## Configuring other global options

### Configuring the statistics options

The *denominator* defines which contacts comprise the total number of contacts. This number is determined by the type of report the service level is displayed in. In a real-time report, the total number of contacts is the number of contacts received since the last shift start, up to a maximum of 24 contacts. In a cumulative or historical report, the total number of contacts depends on the time range specified in the report. The denominator can include:

- The number of contacts answered during the defined time.
- The number of contacts abandoned during the defined time.
- The number of contacts abandoned after the service level interval. (You can use this number instead of the total number of abandoned contacts, if contacts that are abandoned quickly are not included.)
- The number of redirected contacts, if the **Include in service level calculations** check box is selected under **Redirected Contacts**.

---

**NOTE:** The meaning of the terms Abandoned, Answered, and Redirected differ by media. For details, see the *Reporting Reference Guide*.

---

### Example

If the global service level interval for voice is set to 30 seconds, it means that calls in your contact center should be completed within 30 seconds. Assume that 15 calls come into the contact center: 9 calls are answered within 30 seconds; 2 calls are abandoned by the caller before 30 seconds; and 4 calls are answered after 30 seconds. This means:

- Answered in service level interval = 9
- Abandoned in service level interval = 2
- Answered = 13
- Abandoned = 2

Based on these numbers, in the Service Level Calculation Formula dialog box:

- The first formula calculates the service level as  $11/15 = 0.73333333$
- The second formula calculates the service level as  $9/13 = 0.692307$
- The third formula calculates the service level as  $9/15 = 0.6$
- The fourth formula calculates the service level as  $9/13 = 0.692307$

## 15.7.2 Configuring the wait time

By default, wait time starts when a contact is placed in a queue. You can specify whether to include the time before a call is enqueued (such as when the contact is in an IVR) or the time when a callback or e-mail message is suspended by the system. This is reflected in the wait time statistics used in reporting.

The wait time includes the time a contact spends reserved for a specific user while enqueued. Reserved contacts that remain unanswered before proceeding to the queue steps could adversely affect the service level calculation. For more information, see [Section 8.4.1, "Configuring the manual reserve time", on page 150](#), and [Section 15.7.1, "Configuring the service level interval", on page 288](#).

### To configure the wait time:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Statistics**.
3. Under **Wait Time**, do the following:
  - To have the wait time start when the call arrives at the first monitored resource, such as an IVR extension, select the **Include time before enqueue** check box. When this option is cleared, the wait time starts when the call is enqueued. This option only applies to calls.
  - To include the time when the contact is suspended by the system, select the **Include system suspended contacts** check box. The system suspends the routing of e-mail messages and callbacks when the current time is outside the configured routing schedule for the media type. This option only applies to e-mail messages and callbacks.
4. Click **OK**.

## Configuring other global options

Configuring the statistics options

### 15.7.3 Configuring the user calculation

Statistics are monitored for every OpenScape Contact Center user who handles contacts. These statistics include the time spent in each state and utilization.

Utilization is the percentage of logged on time that a user spends handling routed contacts or otherwise working (for example, attending meetings):

$$\text{Utilization} = (\text{Routed Handling time} + \text{Busy time}) \div \text{Logged on time} * 100$$

You can choose to include the time a user spends in Idle state in the Utilization calculation. For more information on the definition of user statistics, see the *Reporting Reference Guide*.

You can also specify the amount of time that must pass after a user contacts another person at the site, for the contact to be considered a consultation.

#### To configure the user calculation:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Statistics**.
3. Under **User Calculations**, do the following:
  - In the **Consider consultation after** box, type or select the number of seconds that must be exceeded after a user contacts another person at the site, for the contact to be considered a consultation.
  - To include the time that a user spends in Idle state in the Utilization calculation, select the **Include idle time in utilization** check box.
4. Click **OK**.

## 15.7.4 Configuring how contacts that are finished in Call Director or an IVR are considered

If the OpenScape Contact Center system has Call Director or an IVR as a front end, or if a contact is transferred to Call Director or an IVR from within a routing strategy workflow, the contact can be finished in Call Director or the IVR before it is enqueued. This can happen in two ways: by Call Director or the IVR disconnecting, or by the caller abandoning.

You can specify whether contacts that are finished in this way are considered as Answered or Abandoned. For example, if a customer gets all the information the customer needs from the IVR and then hangs up, you would want this to be considered Answered rather than Abandoned. Contacts that are redirected out of scope are also considered Answered when this option is enabled.

Contacts that finish in Call Director or an IVR while they are enqueued are considered Abandoned, regardless of this setting value.

### To configure how contacts that are finished in Call Director or an IVR are considered:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Statistics**.
3. To consider the contacts that are finished in Call Director or an IVR as Answered, under **Call Director or IVR**, select the **Consider finished in Call Director or IVR as Answered** check box. If you do not select this option, these contacts will be considered as Abandoned.
4. Click **OK**.

## 15.7.5 Configuring the shifts

The real-time statistics are calculated for contacts based on time periods in the contact center normally defined as shifts. At the start of a shift, the real-time statistics for your contact center are set to 0 to start calculating new real-time statistics.

You can have a maximum of three shifts in a 24-hour period. You must specify the Shift 1 start time; the other two start times are optional. By default, the start time for Shift 1 is 00:01 (one minute past midnight). With only one shift configured, your site will have one 24-hour data set per day. The times are entered using the 24-hour clock.

## Configuring other global options

### Configuring the statistics options

The reports and views in the Manager application show the real-time statistics for the current shift only.

#### To configure the shift start times:

1. On the **Tools** menu, click **Options**.
2. In the left pane, under **System Settings**, click **Statistics**.
3. Click the **Shifts** tab.
4. Under **Shifts**, type or select the start time for **Shift 1**. By default, the **Shift 1** check box is selected and cannot be cleared.
5. To configure additional start times, select the check box next to the **Shift** label, and then type or select the required start time.
6. Click **OK**.

---

**NOTE:** To delete a shift start time, clear the check box next to the shift you want to delete.

---

- 7.

# 16 Microsoft CRM integration

The OpenScape Contact Center system can integrate with Microsoft CRM 1.2 or Microsoft Dynamics CRM 3.0. The integration allows to open a Microsoft CRM screen based on user permissions and the presence of specific contact data key/value pairs associated with a call.

## 16.1 Microsoft CRM user requirements

Each user for which the Microsoft CRM integration is to be enabled:

- Must have an account with access to the Microsoft CRM server machine.
- Must have the Microsoft CRM Integration software installed.

With these prerequisites satisfied, the user definition set up in the Manager application must be modified.

### To enable a user for Microsoft CRM integration:

- When configuring the user definition, on the **Permissions** tab, set the **Enable Microsoft CRM integration** User permission to **Yes**. For details, see [Section 4.1.2, "Configuring the user permissions", on page 30](#).

---

**NOTE:** We strongly recommend that identical user names be used in OpenScape Contact Center and Microsoft CRM configuration.

---

## 16.2 Microsoft CRM routing strategy workflow considerations

Whether a Microsoft CRM screen pop will be displayed in the Client Desktop application when a contact arrives depends on the presence of specific key/value pairs in the contact data associated with the incoming contact. Components that write to the contact data, such as a Contact Data Update component, can be configured to include this information in a routing strategy workflow.

To pop a Microsoft CRM form, the contact data for a call must include a MS\_CRM\_MATCH key/value pair, a MS\_CRM\_NOMATCH key/value pair, or both. In addition, if you use the Account or Case options with these keys, you can use the MS\_CRM\_ACC\_NUM and

## Microsoft CRM integration

Microsoft CRM routing strategy workflow considerations

MS\_CRM\_CASE\_NUM key/value pairs to include a Case number or Account number for matching purposes. The following table provides details on these key/value pairs.

**NOTE:** If a search matches multiple entries in the Microsoft CRM database, an Advanced Find window opens. The user can then enter search parameters manually to try to qualify the correct caller record.

Key	Purpose and legal values
MS_CRM_MATCH	<p>Specifies the form type displayed when information collected for the current contact matches a Microsoft CRM database record, as follows:</p> <ul style="list-style-type: none"><li>• <b>Contact</b> – Pops a Contact form if the ANI associated with the contact matches the Business Phone, Home Phone, Mobile Phone, Fax, Pager, or Phone fields of a record in the Microsoft CRM database.</li><li>• <b>Lead</b> – Pops a Lead form if the ANI associated with the contact matches the Business Phone, Home Phone, Mobile Phone, Fax, Pager, or Phone fields of a record in the Microsoft CRM database.</li><li>• <b>Account</b> – Pops an Account form if the account number provided with the MS_CRM_ACC_NUM key matches an Account Number field of a record in the Microsoft CRM database. If no MS_CRM_ACC_NUM key is present, pops an Account form if the ANI associated with the contact matches the Business Phone, Home Phone, Mobile Phone, Fax, Pager, or Phone fields of a record in the Microsoft CRM database.</li><li>• <b>Case</b> – Pops a Case form if the MS_CRM_CASE_NUM value provided matches an existing case number in a record in the Microsoft CRM database.</li></ul>
MS_CRM_NOMATCH	Specifies the type of form to be popped to the user if no match is found for the provided "MS_CRM_MATCH" specification or if no MS_CRM_MATCH is provided. The values you can provide are identical to those for the MS_CRM_MATCH key.
MS_CRM_ACC_NUM	Stores an account number used in conjunction with a MS_CRM_MATCH or MS_CRM_NOMATCH that specifies the <b>Case</b> option.
MS_CRM_CASE_NUM	Stores a case number used in conjunction with a MS_CRM_MATCH or MS_CRM_NOMATCH that specifies the <b>Account</b> option.

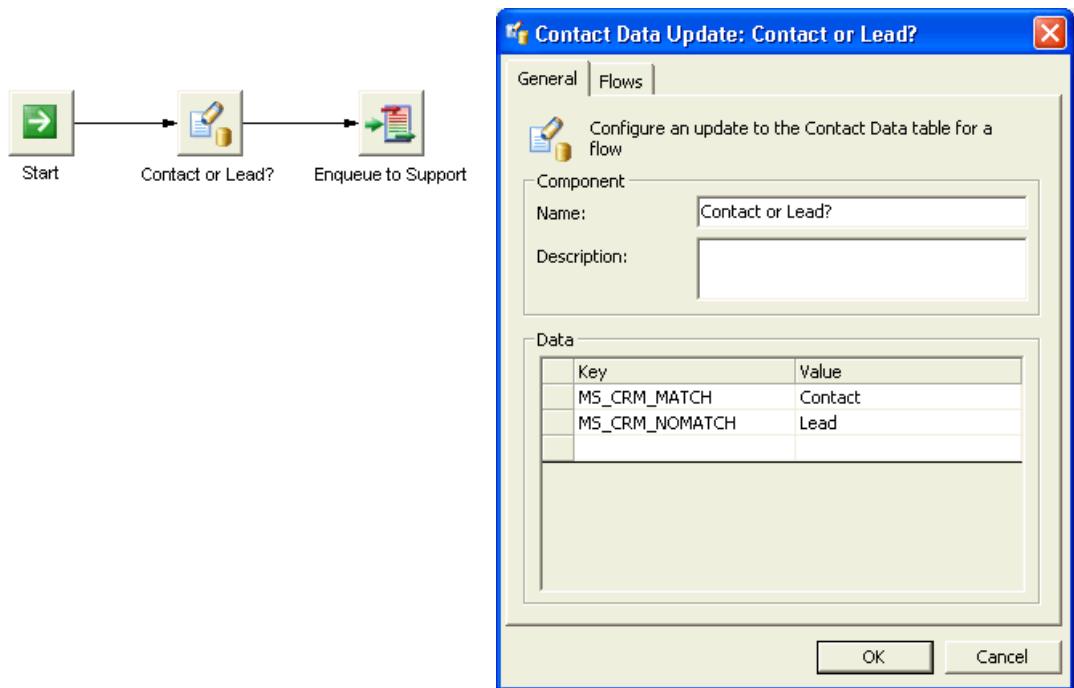
Table 13

Contact data key/value pairs

In a simple scenario, you may want to show one of two Microsoft forms:

- Display a populated Microsoft CRM Contact form if the ANI of an incoming contact matches a contact in your Microsoft CRM database.
- Display a new Lead form if no match is found.

The following diagram shows the routing strategy workflow and the configuration of the Contact Data Update component that sets the Microsoft CRM contact data key/value pairs for this scenario.



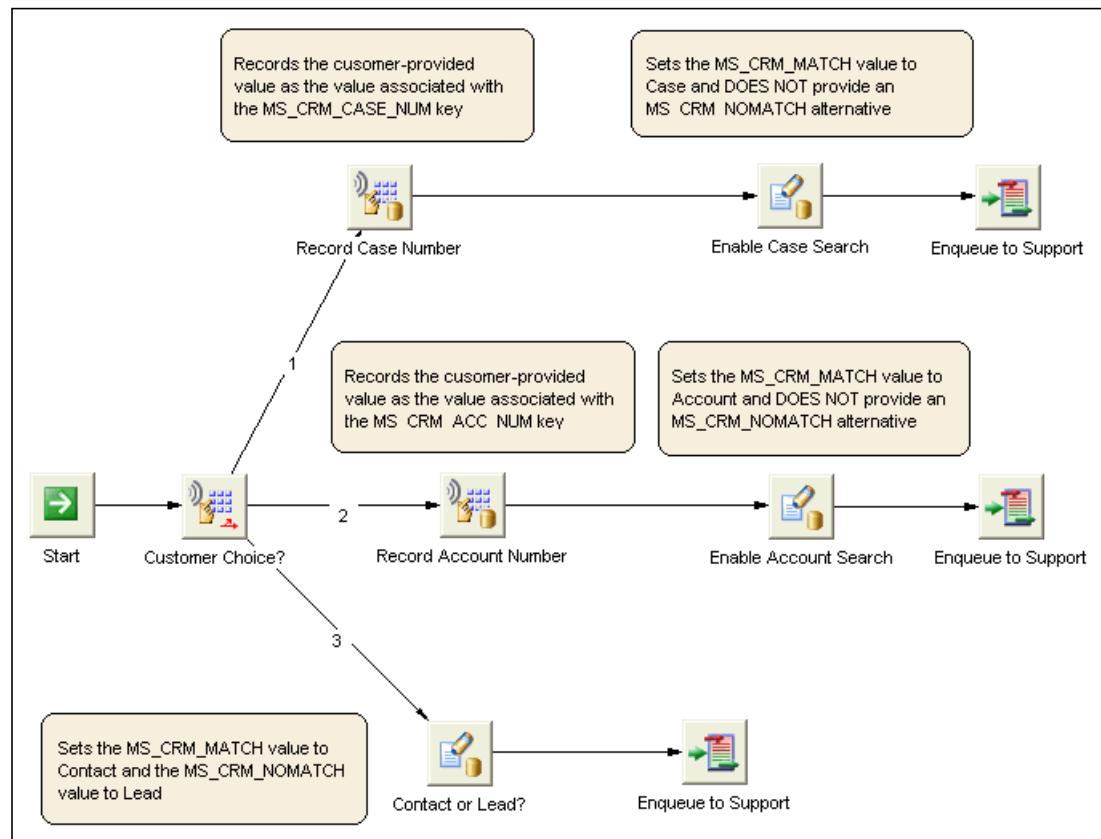
In a more complex scenario, you could initially use Call Director menu prompts to offer a calling customer three choices:

- Offer the choice to enter a Case number. This would be useful when customers are provided a trouble ticket and subsequently call back to follow up on the issue. If the Case number matches a Case number in the Microsoft CRM database, a populated Case form is popped. If there is no match, the customer typed the number incorrectly for example, no form should be popped, forcing the user to locate the customer record manually.
- Offer the choice to enter an Account number. This would be the quickest way to have the user prepared to proceed where no Case number is involved. If the Account number matches an Account number in the Microsoft CRM database, a populated Account form is popped. If there is no match, no form should be popped, forcing the user to locate the customer record manually.

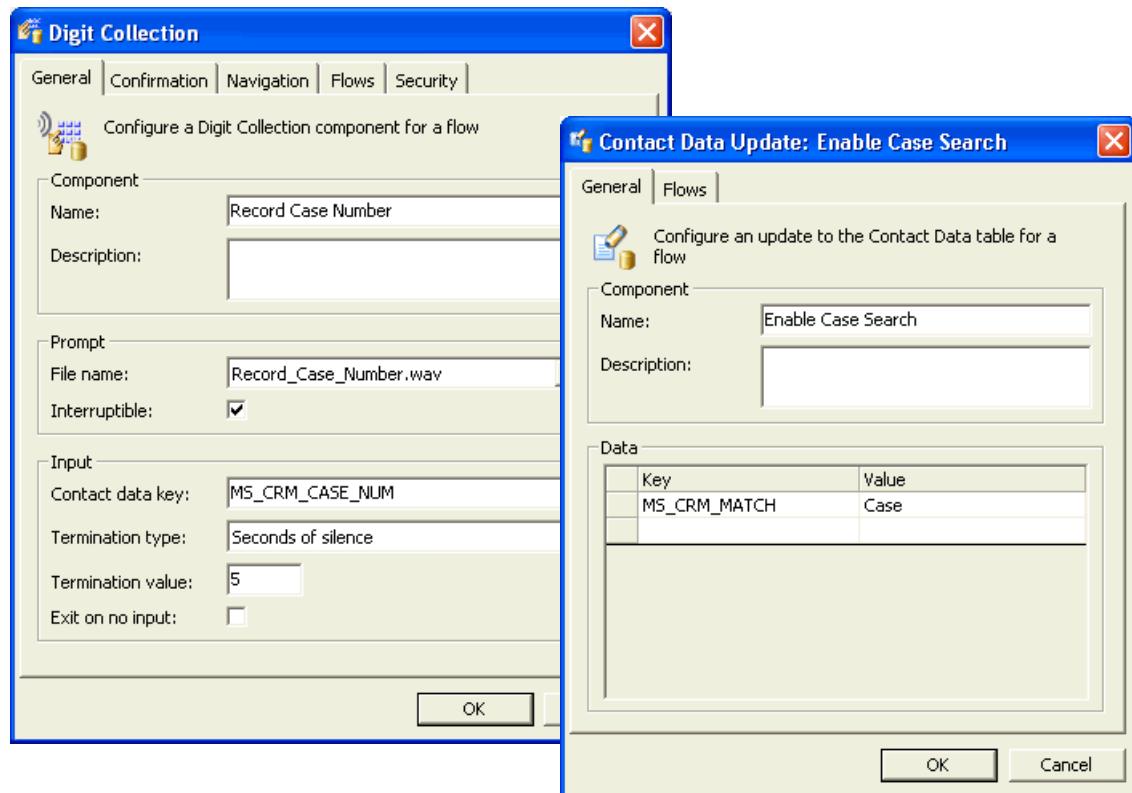
## Microsoft CRM integration

### Microsoft CRM routing strategy workflow considerations

- Offer the choice to proceed without providing a Case number or Account number. If the ANI of the incoming call matches an ANI in the Microsoft CRM database, a populated Account form is popped. If there is no match, a Lead form should be popped, allowing the user to create a new record.



For the last option, component configuration is identical to that in the previous scenario. For the Account and Case number options however, since the Digit Collection components allow you to set only one contact data key/value pair, setting the relevant contact data key/value pairs must be performed in two steps. For example, the following diagram shows the key/value pair configuration for the **Record Case Number** and **Enable Case Search** components.



Note also that since a screen pop is not to be displayed if there is no matching Case number in the Microsoft database, the Enable Case Search component does not specify a MS\_CRM\_NOMATCH key/value pair.

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