
SL1100

Contact Center Supervisor's Manual

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NEC Corporation of America
6535 N. State Highway 161
Irving, TX 75039-2402

Communications Technology Group

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Introduction to NEC Contact Center



SECTION 1 OVERVIEW

The NEC Contact Center is a series of Windows-based software programs designed to enhance the Contact Center features of the NEC SL1100 Telephone System. The software displays both real-time data and historical reports.

Contact Center has many beneficial features:

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

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

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

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

The Contact Center program suite requires a Personal Computer (PC) running Windows 7, Windows 8, Windows 8.1 or Windows Server 2012.

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

SECTION 2 CONTACT CENTER COMPONENTS

Contact Center has three main system components:

- Contact Center Server
- Contact Center Monitor
- Contact Center Reports

2.1 CONTACT CENTER Server

The Contact Center Server program is responsible for setting up communication with the NEC Chassis and recording call activity to an external database. There is a SL1100 Contact Center Service that is running at all times so that call records can be properly stored.

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

Refer to [Installing and Configuring NEC Contact Center on page 2-1](#).

2.2 Contact Center Monitor

The Contact Center Monitor program allows the call center supervisors to view performance characteristics of the call center in real-time. With this utility, the supervisor can track the activities of individual agents, as well as survey the efficiency of the each queue, or the entire call center. Through the simple user interface, each supervisor can define exactly the information that is relevant and layout the data tables on their screen. The tables are automatically updated with current data every few seconds, so that the user has access to the most up-to-date information.

The Contact Center Monitor program can run on the Server PC, or run on a networked PC (client). An ID and Password are required to run the Monitor program. Up to five Monitor programs can be running simultaneously. The number of simultaneous Monitors is dependent on the site licensing.

When the Contact Center Monitor is started for the first time you must enter the Server IP address or Server PC name. If Monitor is located on the Server PC then the Server Name needs to be localhost. The next time Monitor is started it asks for your User Name and Password.

2.3 Contact Center Reports

The Contact Center Reports allow the call center supervisors to generate detailed reports of historical call center data. With this utility, the supervisor can analyze the activities of individual agents, as well as survey the efficiency

of the each queue or the entire call center. Through the simple user interface, each supervisor can view exactly the reports that are relevant to their operation. All reports are displayed in a tabular format, and most of the reports also have an option to display a graphical representation of the data.

The Contact Center Reports can run on the Server PC, or run on a networked PC (client). An ID and Password are required to run the Reports program. Up to five Reports programs can be running simultaneously. The number of simultaneous Reports is dependent on the site licensing.

When the Contact Center Reports is started for the first time you must enter the Server IP address or Server PC name. If Reports is located on the Server PC, the Server Name needs to be **localhost**. The next time Reports is started it asks for your User Name and Password.

 *The reports can be exported to CSV, Excel, HTML, PDF and XML formats.*

2.4 Contact Center Admin

The Contact Center Admin program is used to set up and configure the Contact Center operation to match the KSU telephone set up.

The Contact Center Admin allows you to perform all facets of Contact Center programming via a personal computer (PC) connected to the network, or on the same PC as the Server. The operator can save a configuration to a local file and upload that configuration to the Contact Center at a later time.

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Installing and Configuring NEC Contact Center



SECTION 1 HARDWARE AND SOFTWARE REQUIREMENTS

The following items are required for the NEC Contact Center.

1.1 PC Requirements

Contact Center Server

- Pentium class machine with 1GHz processor
- 1GB RAM
- 250 MB available disk space (38 MB additional if .NET framework is not installed)
- Windows Server 2003, Windows Server 2008, Windows 7 Professional and Ultimate 32-bit/64-bit, Windows 8 Professional and Enterprise 32-bit/64-bit, Windows 8.1 Professional and Enterprise 32-bit/64-bit.
- Network Adapter for connecting to the SL1100 via the LAN
- CD-ROM Drive
- Mouse
- Printer (optional)


Contact Center Admin. Monitor. & Reports

- Pentium class machine with 500MHz processor
- 256MB RAM
- 12 MB available disk space (38 MB additional if .NET framework is not installed)
- Windows 7 Professional and Ultimate 32-bit/64-bit, Windows 8 Professional and Enterprise 32-bit/64-bit,

Windows 8.1 Professional and Enterprise 32-bit/64-bit.

- Network Adapter for connecting to the Contact Center Server via the LAN
- CD-ROM Drive
- Mouse
- Printer (optional)

As with most Windows applications, running the software on a faster PC with increased memory can improve operation. Applications that work in real-time, like Contact Center, are especially sensitive to the need for an efficient hardware system. If your system processes several applications, or is slow in processing real-time data, NEC suggests upgrading the speed and/or RAM capacity of your PC.

 *NEC strongly suggests running the server on a dedicated PC.*

Virtual Machine Support

The following environments are supported for the inContact Center Server on a virtual machine:

- VMWare, Workstation 9
- VMWare, ESXI 5.1
- Hyper-V

SECTION 2 NETWORK SUPPORT

The Contact Center programs can be configured to communicate on a TCP/IP or NETBIOS network.

It is assumed that the network configuration is already functioning. If network support is needed, contact the network administrator.

Remember that the Monitor and Reports programs require the IP address, or machine name, of the Server PC. If the Server PC has a roving address, make sure that a valid name server is present on the network so the machine name can be used in place of the hard-coded IP address.

SECTION 3 INSTALLING CONTACT CENTER SOFTWARE

This section outlines the basic installation procedure for installing Contact Center.

3.1 Removing Previous Software

1. From the Windows Start menu, select **Control Panel**.
2. Double-click **Programs and Features**.
3. From the program list, select **SL1100 Contact Center Server** and click **Uninstall**.
4. Choose **Uninstall SL1100 Contact Center Monitor**, if applicable.
5. Choose **Uninstall SL1100 Contact Center Reports**, if applicable.

3.2 Installation

All Windows programs and applications must be closed prior to installation.

Installing Contact Center Admin

1. Double click the SL1100_Contact_Center_Server.exe file.
2. Click **Yes** to the Software License Agreement. It will begin copying files.

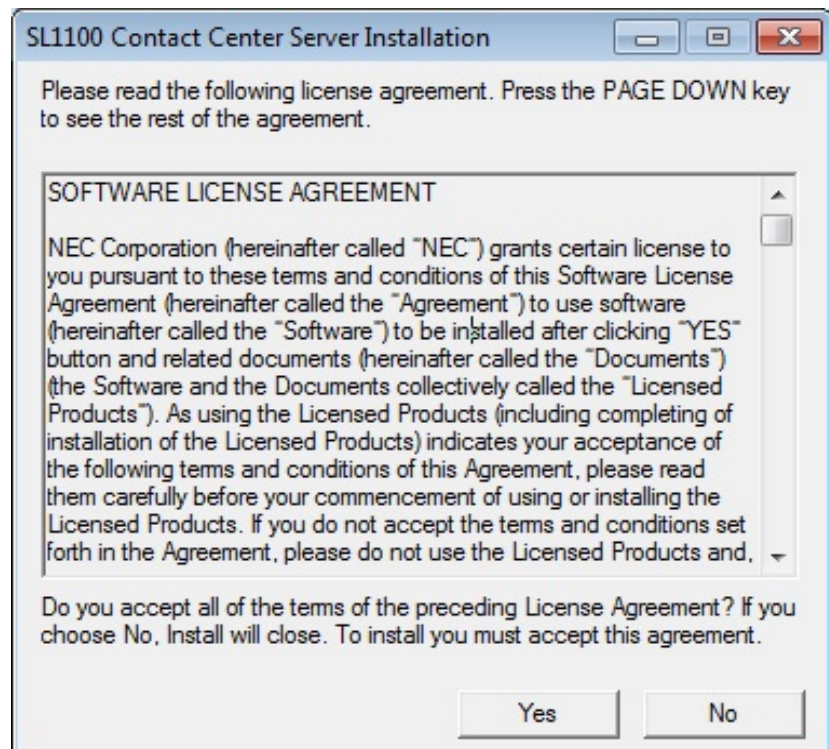


Figure 2-1 Contact Center Server Software License Agreement

3. Click **Next** to the Welcome to the SL1100 Contact Center Server Setup screen.



Figure 2-2 Contact Center Server Setup Wizard

4. Accept the default Installation Folder and click **Next**.

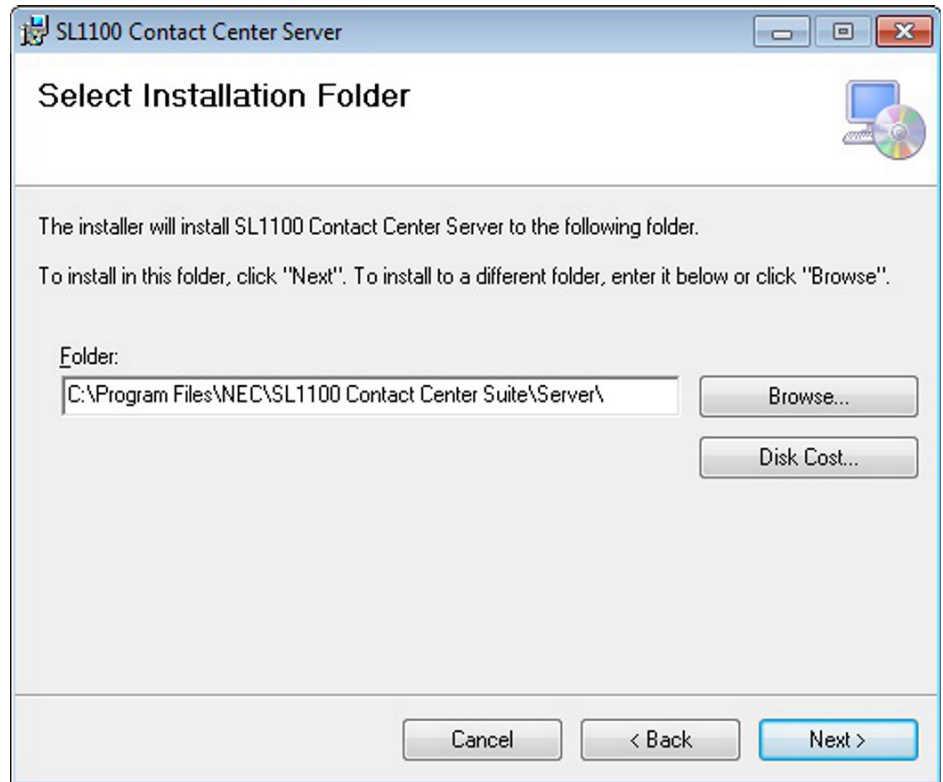


Figure 2-3 Contact Center Server Installation Folder

5. Click **Next** at the Confirm Installation screen.

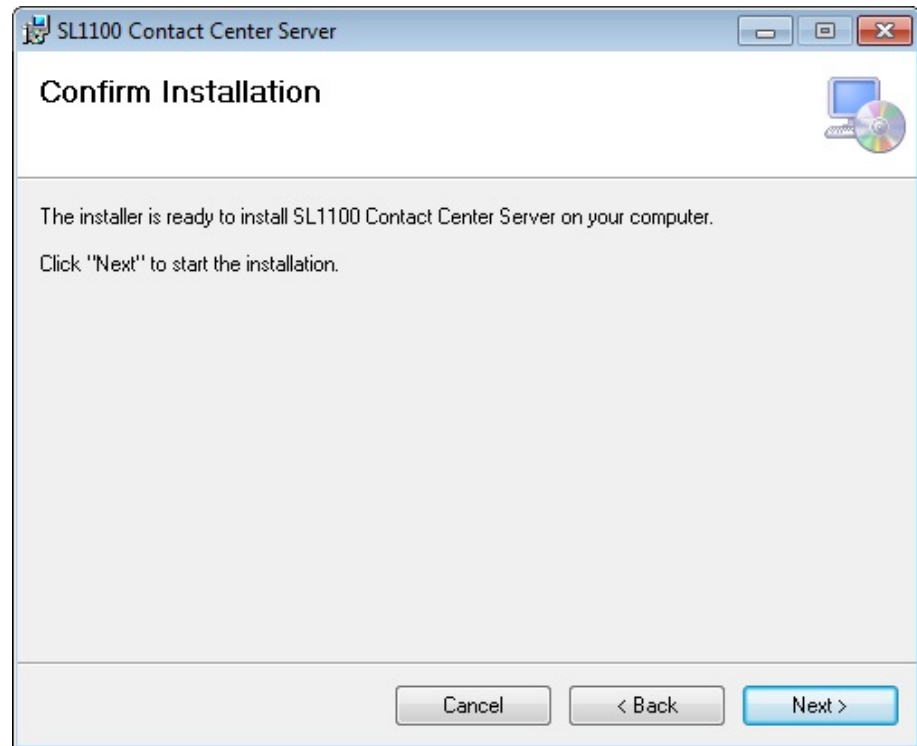


Figure 2-4 Contact Center Server Confirm Installation Screen

6. Click **Close** at the Installation Complete Screen.

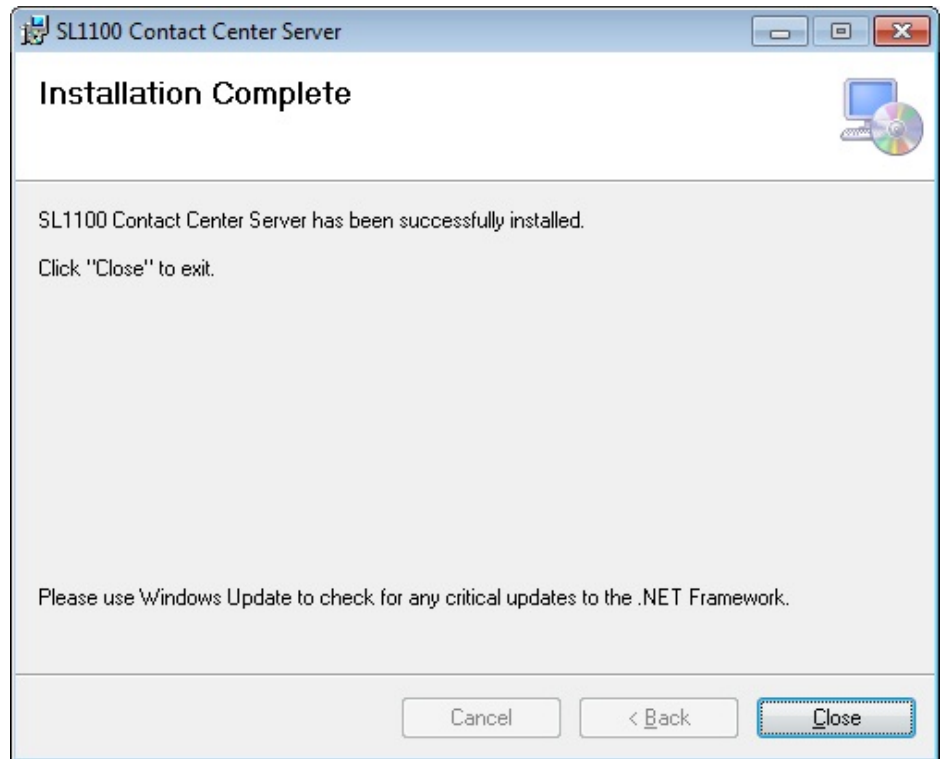


Figure 2-5 Contact Center Server Installation Complete Screen

Installing Contact Center Monitor

1. Double click the SL1100_Contact_Center_Monitor.exe file.
2. Click **Yes** to the Software License Agreement. It will begin copying files.

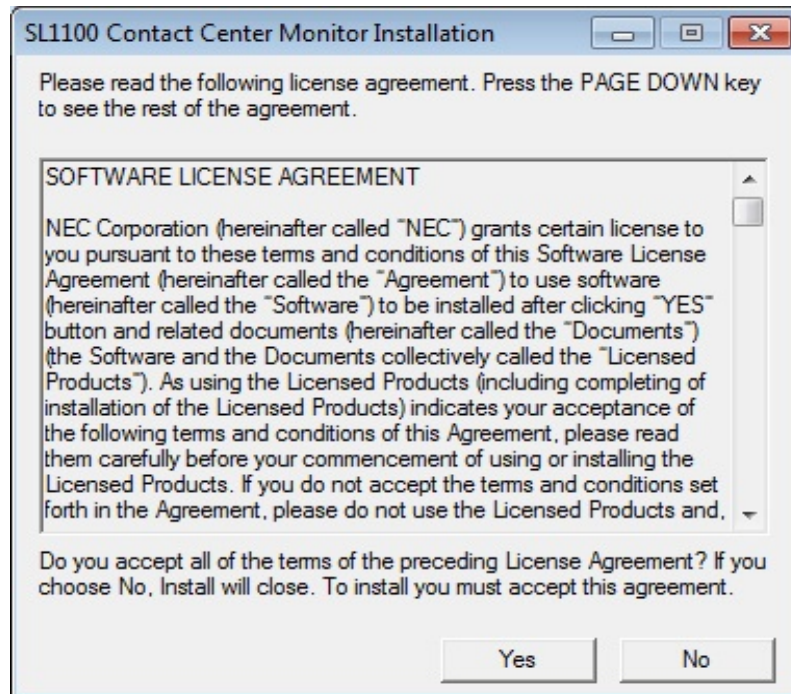


Figure 2-6 Contact Center Monitor Software License Agreement

3. Click **Next** to the Welcome to the SL1100 Contact Center Monitor Setup screen.

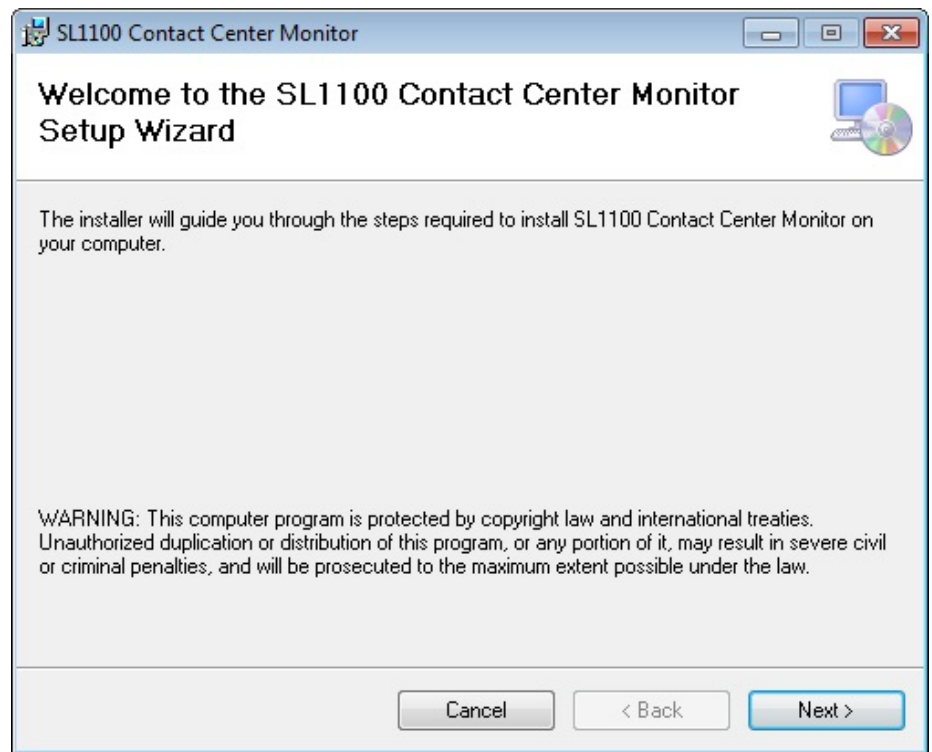


Figure 2-7 Contact Center Monitor Setup Wizard

4. Accept the default Installation Folder and click Next.

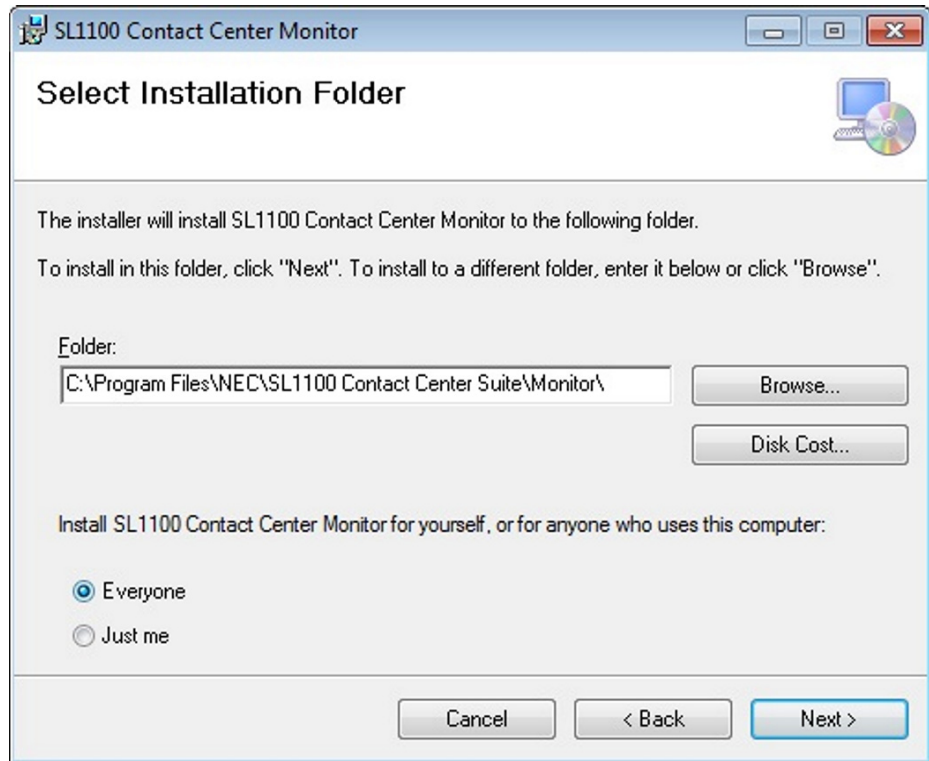


Figure 2-8 Contact Center Monitor Installation Folder

5. Click **Next** at the Confirm Installation screen.

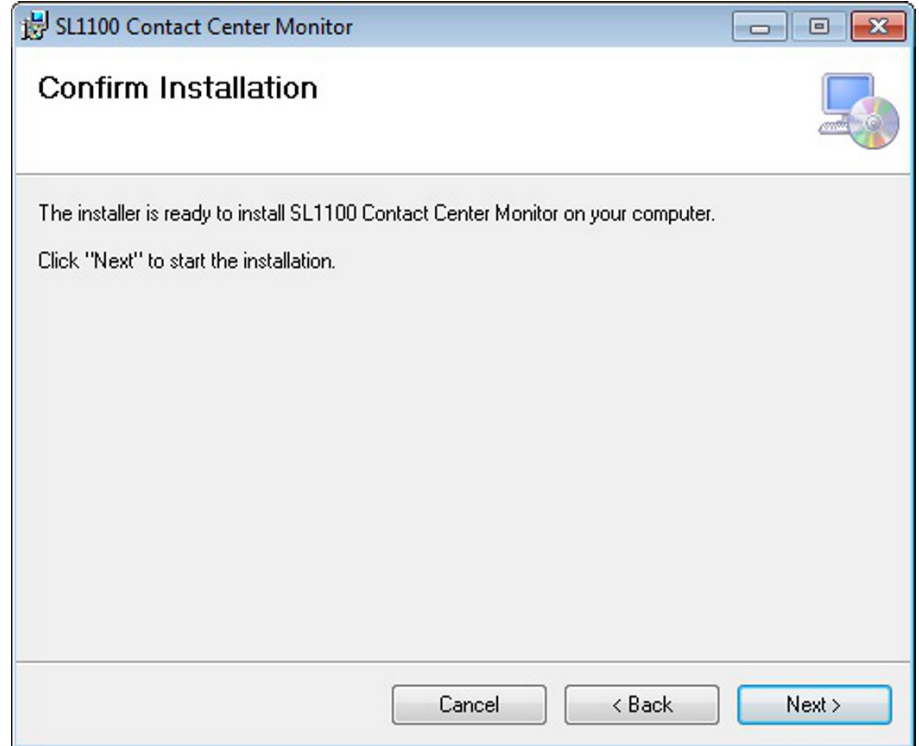


Figure 2-9 Contact Center Monitor Confirm Installation Screen

6. Click **Close** at the Installation Complete Screen.

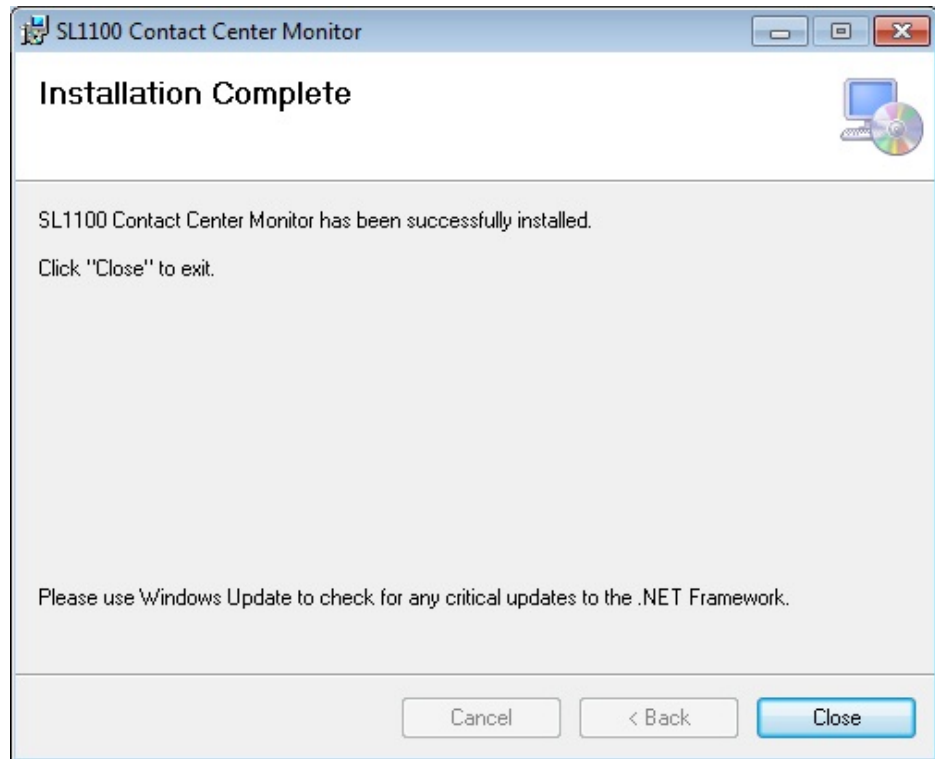


Figure 2-10 Contact Center Monitor Installation Complete Screen

Installing Contact Center Reports

1. Double click the SL1100_Contact_Center_Reports.exe file.
2. Click **Yes** to the Software License Agreement. It will begin copying files.

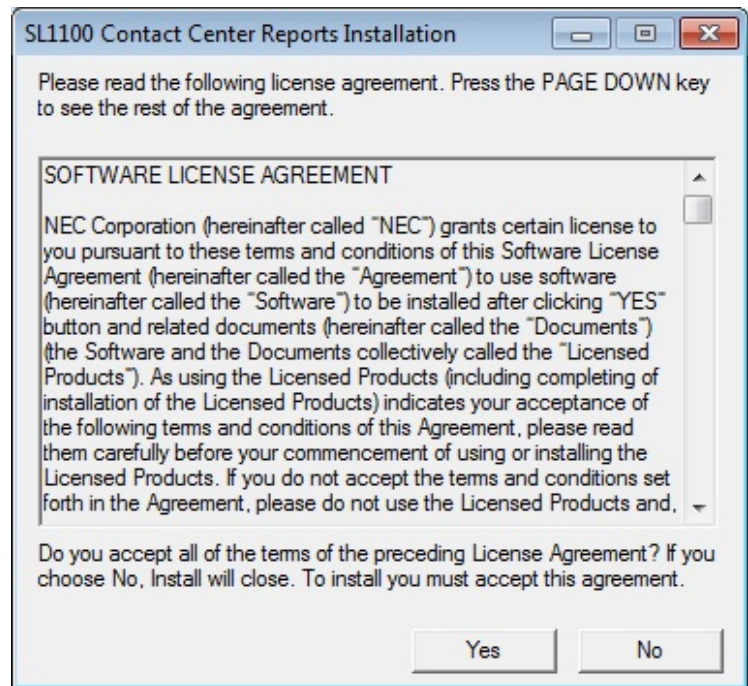


Figure 2-11 Contact Center Reports Software License Agreement

3. Click **Next** to the Welcome to the SL1100 Contact Center Reports Setup screen.



Figure 2-12 Contact Center Reports Setup Wizard

4. Accept the default Installation Folder and click **Next**.

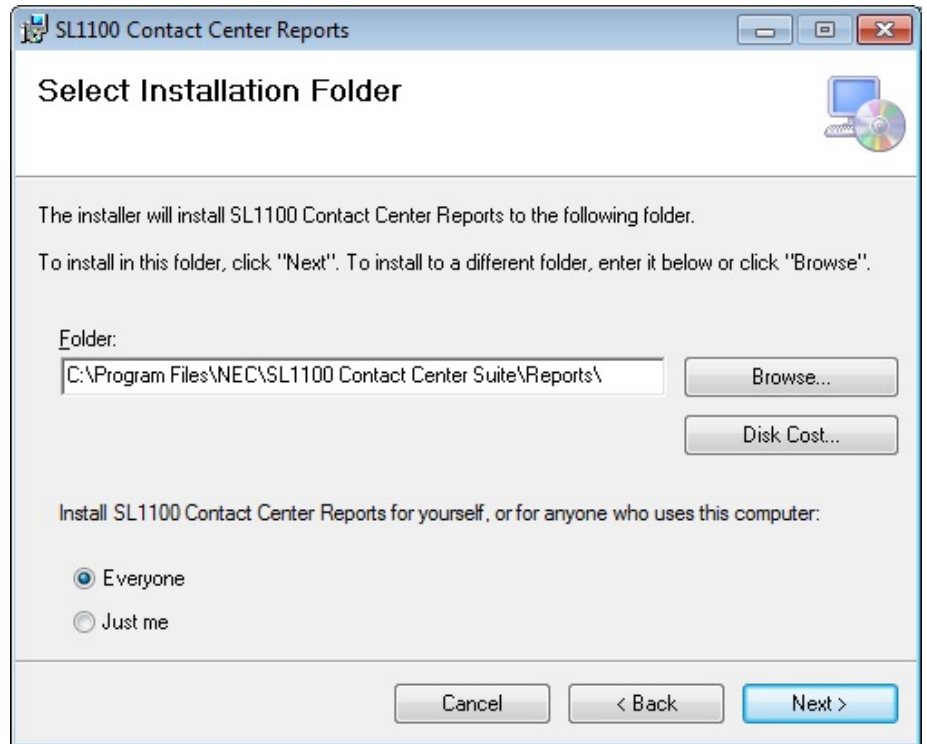


Figure 2-13 Contact Center Reports Installation Folder

5. Click **Next** at the Confirm Installation screen.

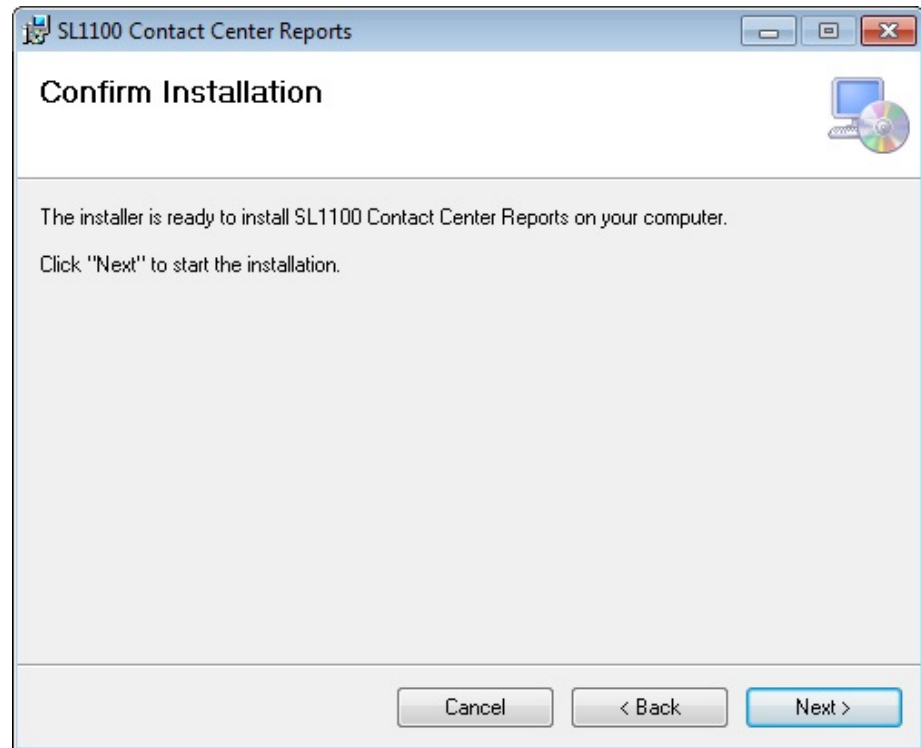


Figure 2-14 Contact Center Reports Confirm Installation Screen

6. Click **Close** at the Installation Complete Screen.

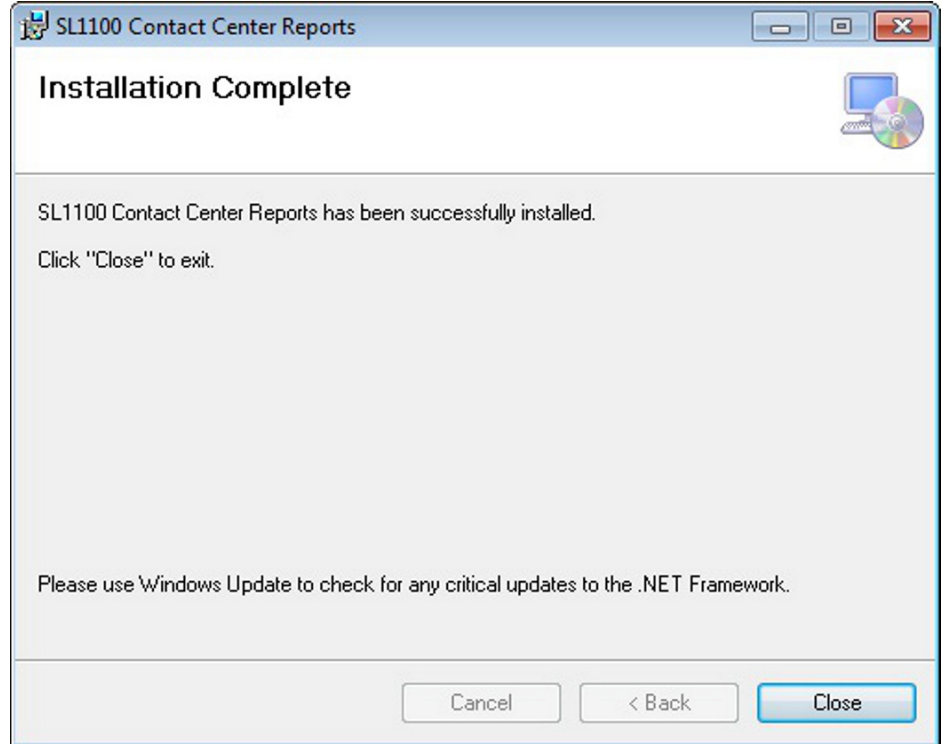


Figure 2-15 Contact Center Reports Installation Complete Screen

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Logging Into Contact Center Server

SECTION 1 STARTING CONTACT CENTER SERVER FOR THE FIRST TIME

To start the Contact Center Server for the first time:

1. From the Windows Start menu, choose **Programs**.
2. Select **NEC, SL1100 Contact Center, Contact Center Server** from the Contact Center menu. The following Welcome display appears:

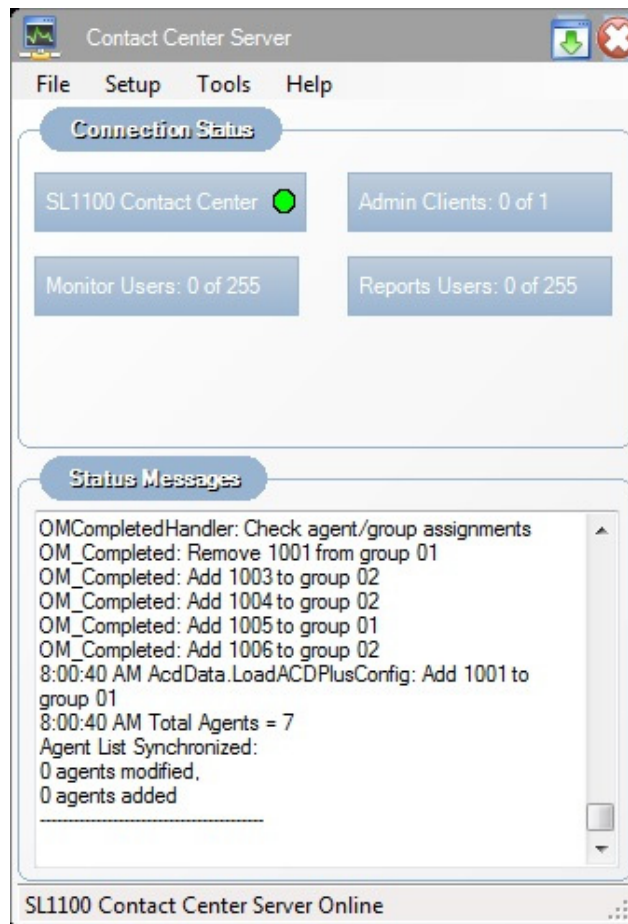


Figure 3-1 Contact Center Server Main Menu

1.1 Describing the Contact Center Server Main Screen

The Main window contains the following information:

Connection Status Box

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

Label	Description
Contact Center	The indicator is green when the Contact Center Server is connected to the SL1100. The indicator turns yellow if the Contact Center Server fails to receive any data from the CPU for 20 minutes. If the Contact Center Server loses communication with the SL1100, the indicator is red.
Monitor Users	The number of active monitor sessions is shown, along with the number of licensed monitor users allowed. The format is Active: Licensed. Maximum of two users supported.
Reports Users	The number of active report sessions is shown, along with the number of licensed report users allowed. The format is Active: Licensed. Maximum of two users supported.

Status Message Box

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

Configuring Contact Center Server



SECTION 1 TOURING THE MAIN CONTACT CENTER SERVER WINDOW

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

The Contact Center Server program is responsible for setting up communication with the SL1100 and recording call activity to an external database. Statistics are stored in the database for historical reference. The NEC Contact Center Service should be left running at all times so that call records can be properly stored. The server can run in a foreground or background window.

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

SECTION 2 FILE MENU

The File Menu selections are listed in [Figure 4-1 Contact Center Server File Menu](#).

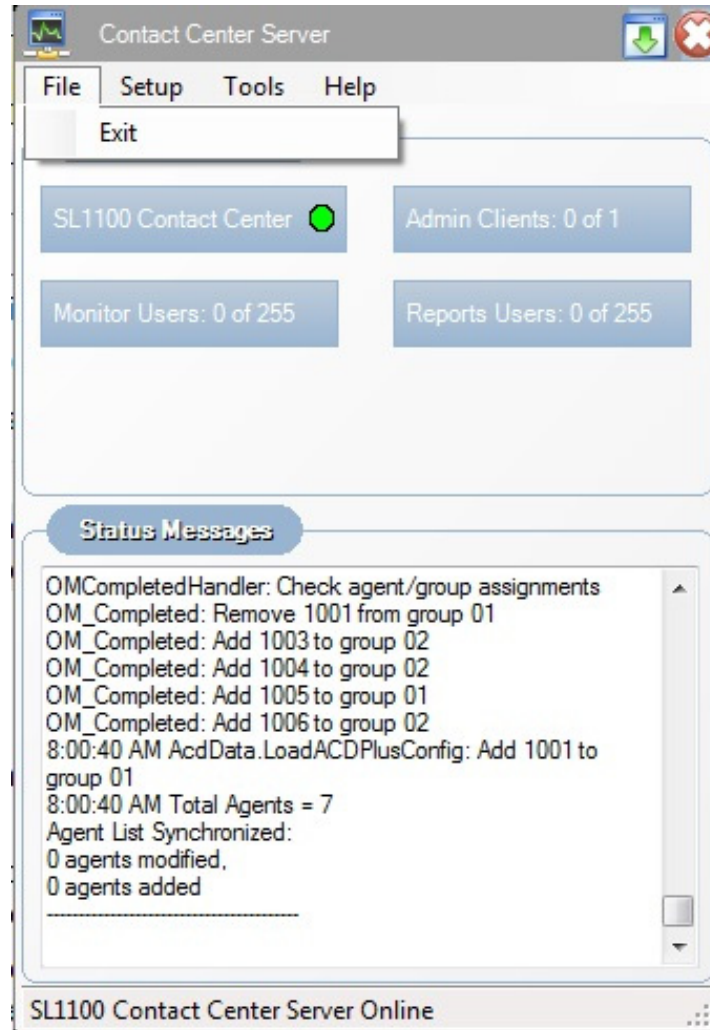


Figure 4-1 Contact Center Server File Menu

2.1 Exit

This function closes the Server application.

SECTION 3 SETUP MENU

The Setup Menu includes three options: Server Settings, Queue Names and License (Retrieve/Cancel request).

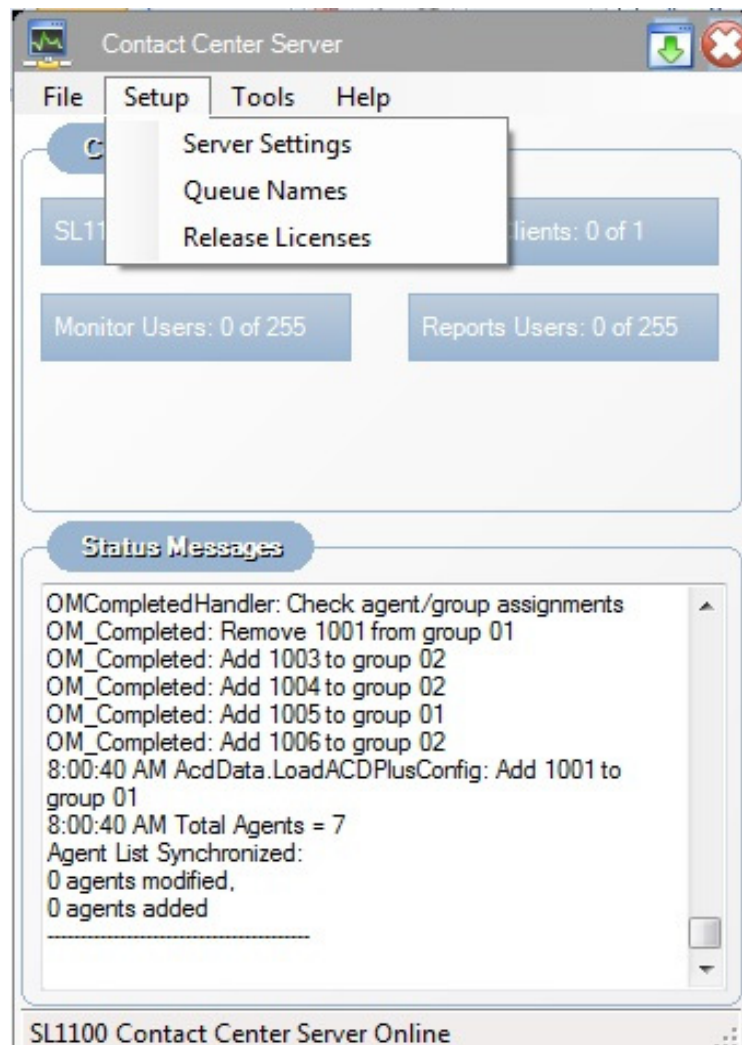


Figure 4-2 Contact Center Server Setup Menu

3.1 Server Settings

The Server Settings option is used to enter the following:

- TCP/IP port for the PBX License Server
- IP Address and TCP/IP port to communicate with the SL1100
- TCP/IP Port for Contact Server Port

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

The screenshot displays a configuration menu for the Contact Center Server. It is organized into several sections:

- SL1100**: Contains an IP Address field set to 10 . 0 . 9 . 20 and a Prg 10-20-02 field set to 4000.
- XML Web Access**: Contains a Prg 90-54-01 field set to 80, a Get Names button, and a status bar indicating the last retrieval was on 12/10/2014 at 8:00 AM.
- PBX License Port**: Contains a Prg 10-47-01 field set to 6080.
- Contact Center Server**: Contains a TCP/IP Port field set to 9090.

At the bottom of the menu are two buttons: an orange **OK** button and a light blue **Cancel** button.

Figure 4-3 Contact Center Server Setup

3.2 Queue Names

The Contact Center Service function allows the administrator to name the Contact Center queues. The name assigned to each queue is displayed within the Monitor views and Reports to easily identify the queue.

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

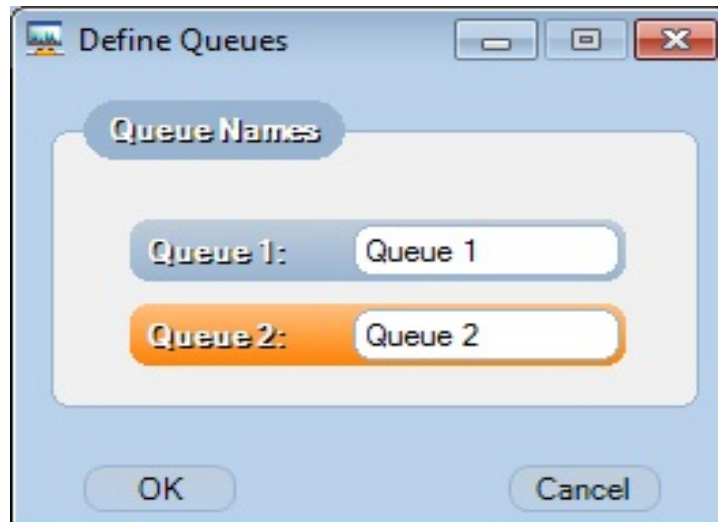


Figure 4-4 Contact Center Queue Names

3.3 License

The license could manually be released and retrieved from the SL1100. The Contact Center Service automatically gets the licenses during start up and releases the licenses with closing.

SECTION 4 TOOLS MENU

The Tools Menu includes three options; Purge Database, System Backup and System Restore.

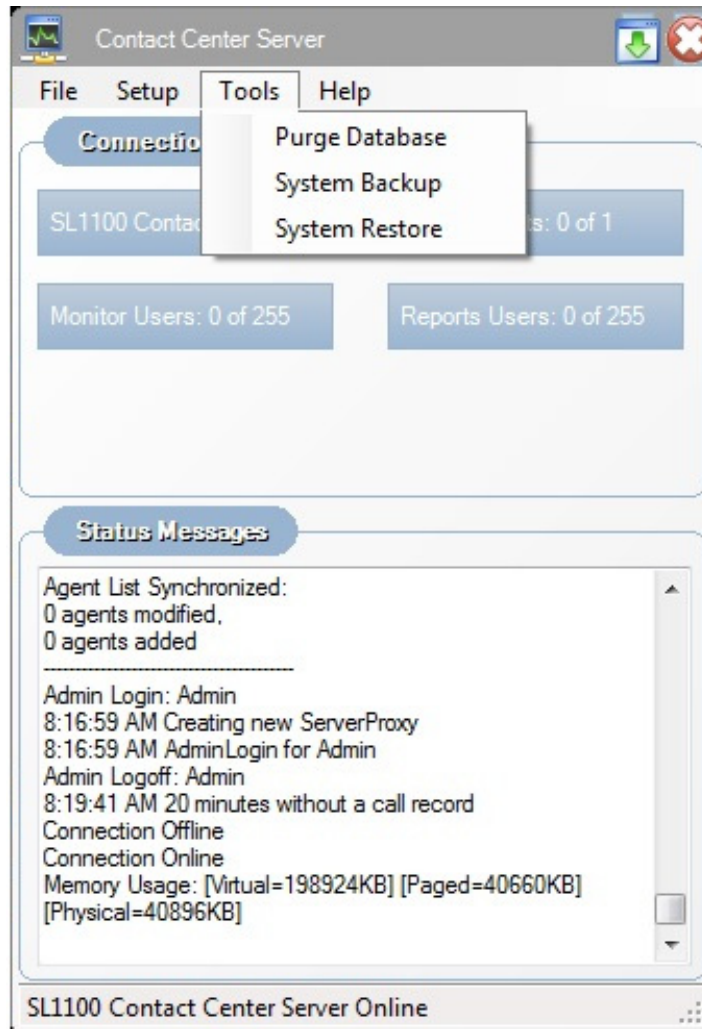


Figure 4-5 Contact Center Tools Menu

4.1 Purge Database

The Purge Database function clears all of the entries within the contact center database that occurred before a specified date. This operation can be used to free up additional storage space on the Contact Center Server.

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

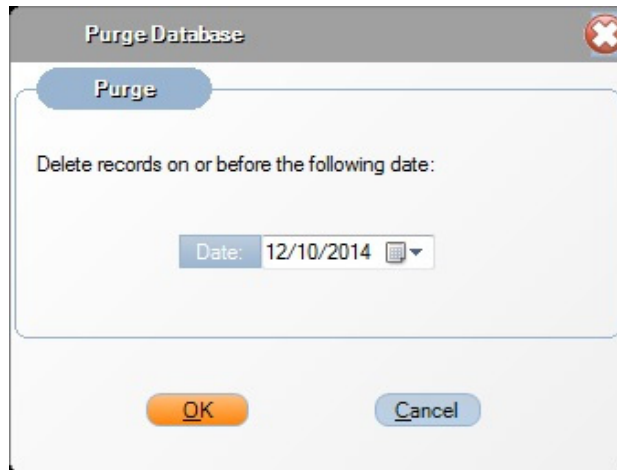


Figure 4-6 Contact Center Tools Menu - Purge Database

4.2 System Backup

The System Backup and System Restore functions allow the user to save the current server configuration. This function can be used if the Contact Center Server is being moved to a new PC.

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

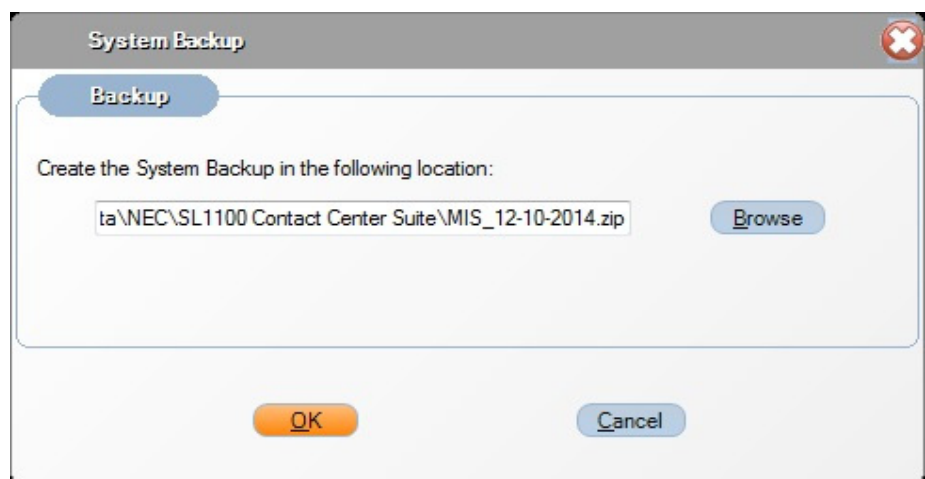


Figure 4-7 Contact Center Tools Menu - System Backup

4.3 System Restore

The System Restore functions allow the user to restore the settings from a System Backup. This function can be used if the Contact Center Server is being moved to a new PC.

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

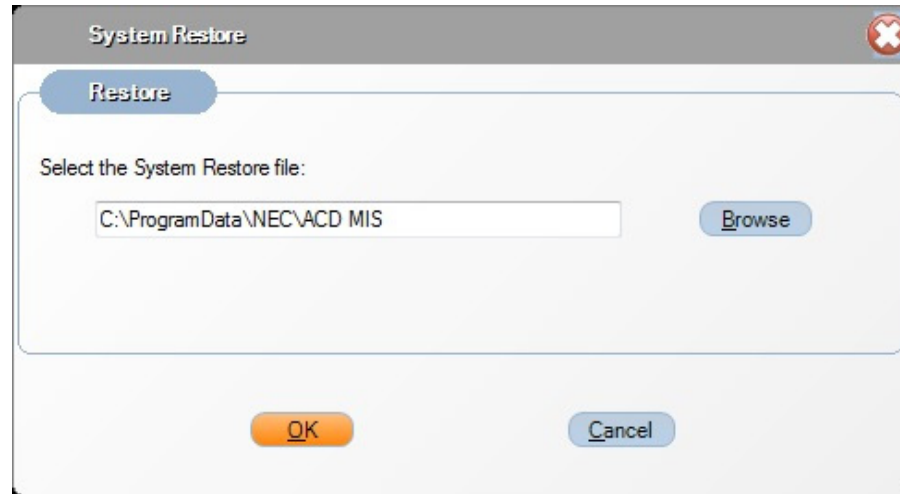


Figure 4-8 Contact Center Tools Menu - System Restore

SECTION 5 HELP MENU

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

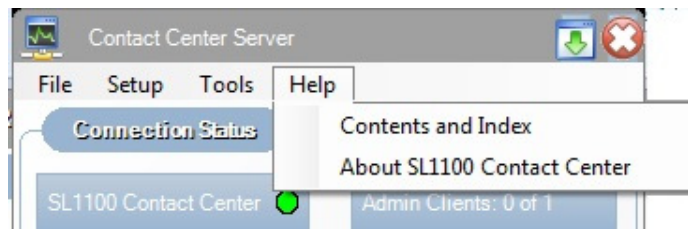


Figure 4-9 Contact Center Server Help

5.1 Contents and Index

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

5.2 About

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

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Learning About Contact Center Monitor



SECTION 1 STARTING CONTACT CENTER MONITOR FOR THE FIRST TIME

To start Contact Center Monitor for the first time:

1. From the Windows Start menu, choose **Programs**.
2. Select Monitor from the NEC SL1100 Contact Center folder.
3. When the Contact Center Monitor is started for the first time, the application prompts the user to enter the name/IP address of the Contact Center Server PC (if on the same PC as the Server, enter name as **localhost**).

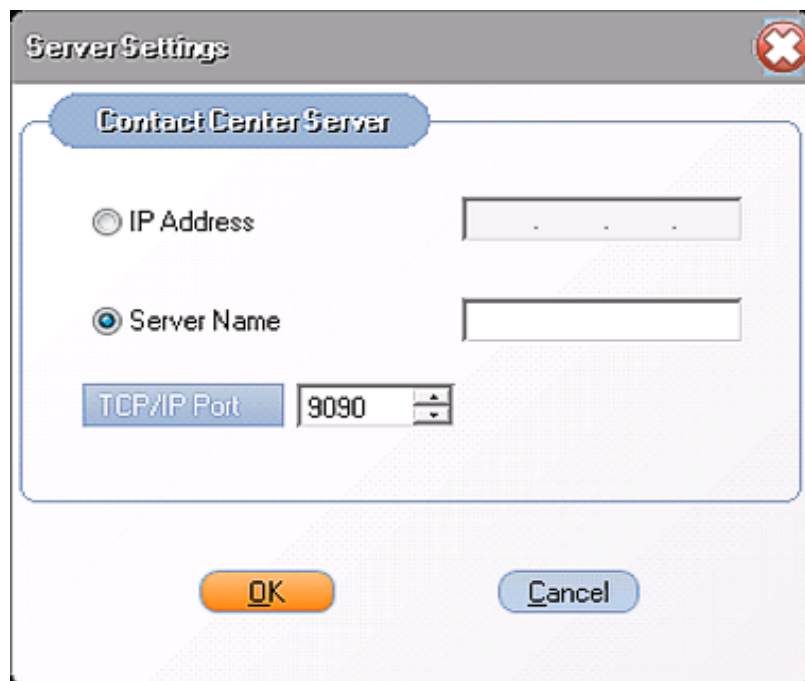


Figure 5-1 Contact Center Server Setup

4. Click the Agent you want to login as, then click **Login**.



Figure 5-2 Contact Center Monitor Login

SECTION 2 EXITING CONTACT CENTER MONITOR

To exit Contact Center Monitor:

From the Contact Center Monitor File menu, select Exit.

- OR -

Click the **Close** button in upper right-hand corner of the Contact Center Monitor window.

SECTION 3 DESCRIBING THE MAIN SCREEN

The Monitor main window provides the user with easy access to the functions required to manage the Monitor views. An example of the main window for the Monitoring application is shown below.

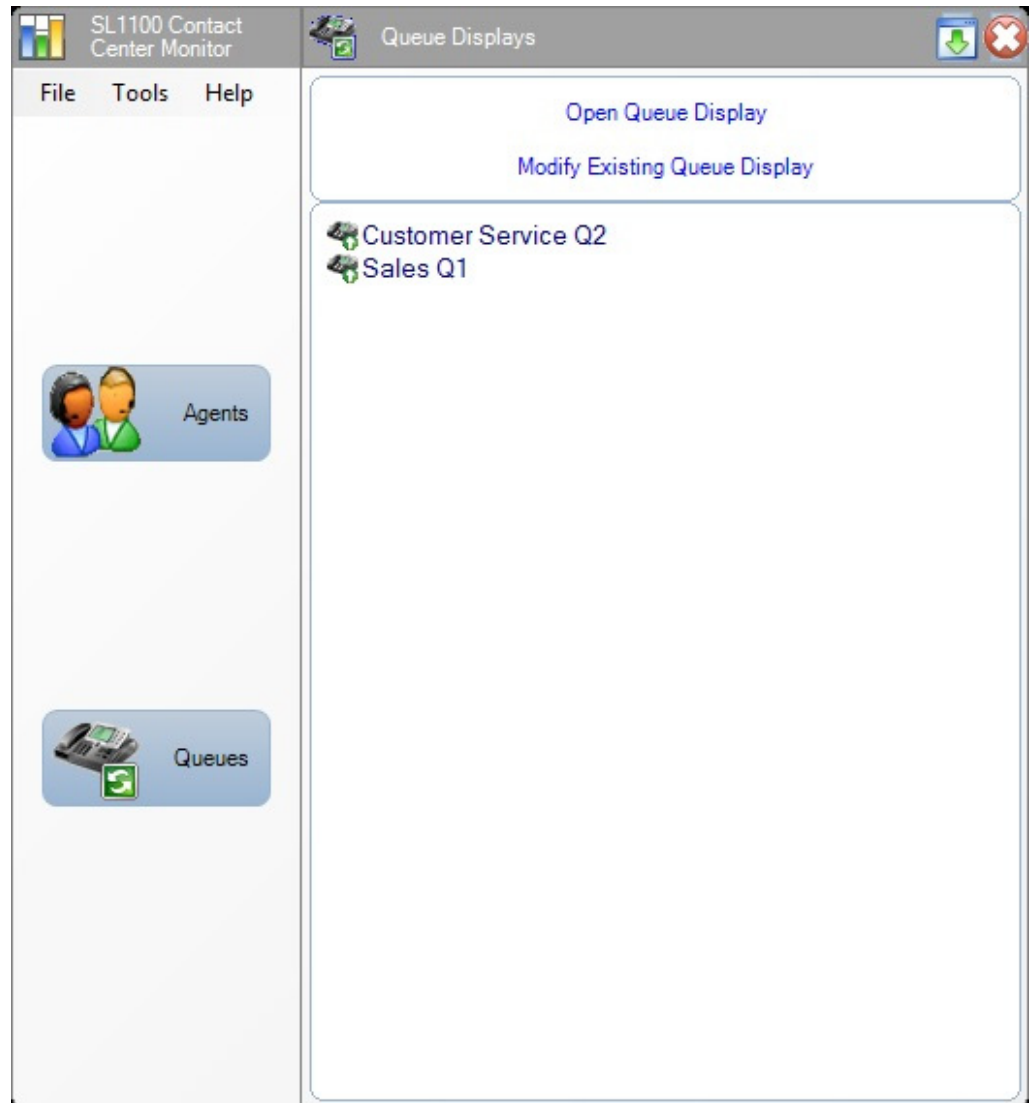


Figure 5-3 Contact Center Monitor Main Menu

The Monitor main window lists the statistics categories on the left side of the form. These categories represent the following types of statistics:

Agents	Includes displays of agent states
Queues	Includes views that display real-time data related to individual queues

Selecting one of these categories updates the right side of the form to show the operations that can be performed within this category. The user can initiate one of these commands by clicking on the desired action.

The lower half of the form shows the displays that are currently defined, if any, in the selected category. Each display represents a separate window that can be opened on the supervisor's screen to show specific data items within the category.

The main window layouts for the other data categories are presented in subsequent sections.

3.1 Agent Displays

When the **Agents** option is selected on the Monitor main window, the following operations are accessible:

- Open Agent Display
- Modify Existing Agent Display

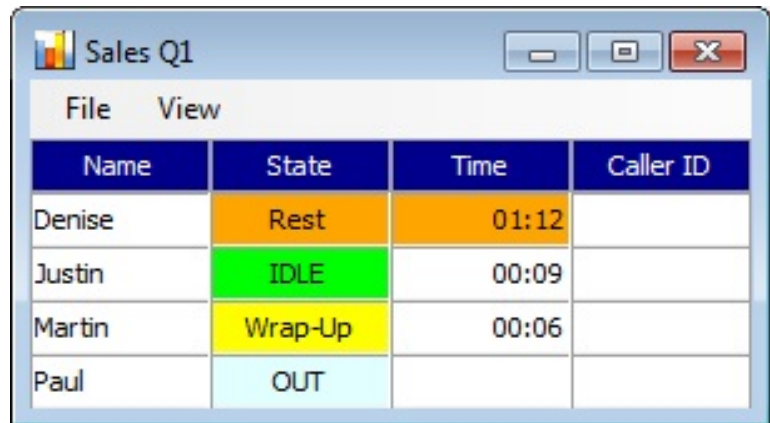
The Contact Center Monitor has two different default agent displays:

- Queue 1 Agent State
- Queue 2 Agent State

The display is defined in the following paragraphs.

3.1.1 Agent State Display

The Agent State Display is used to monitor the current activity for a selected group of agents. The following window shows an example of an Agent State Display.



The screenshot shows a window titled 'Sales Q1' with a menu bar containing 'File' and 'View'. Below the menu bar is a table with four columns: 'Name', 'State', 'Time', and 'Caller ID'. The table contains the following data:

Name	State	Time	Caller ID
Denise	Rest	01:12	
Justin	IDLE	00:09	
Martin	Wrap-Up	00:06	
Paul	OUT		

Figure 5-4 Agent State Display

This display shows their current state and the time that they have been in this state.

3.1.2 Agent State Display Definition

To modify an agent state display, the user selects the **Modify Existing Agent Display** option from the main Monitor window. When this operation is selected, a series of data entry forms are presented which guide the user through the definition process.

The first form to be displayed prompts the user to enter a name for the display.

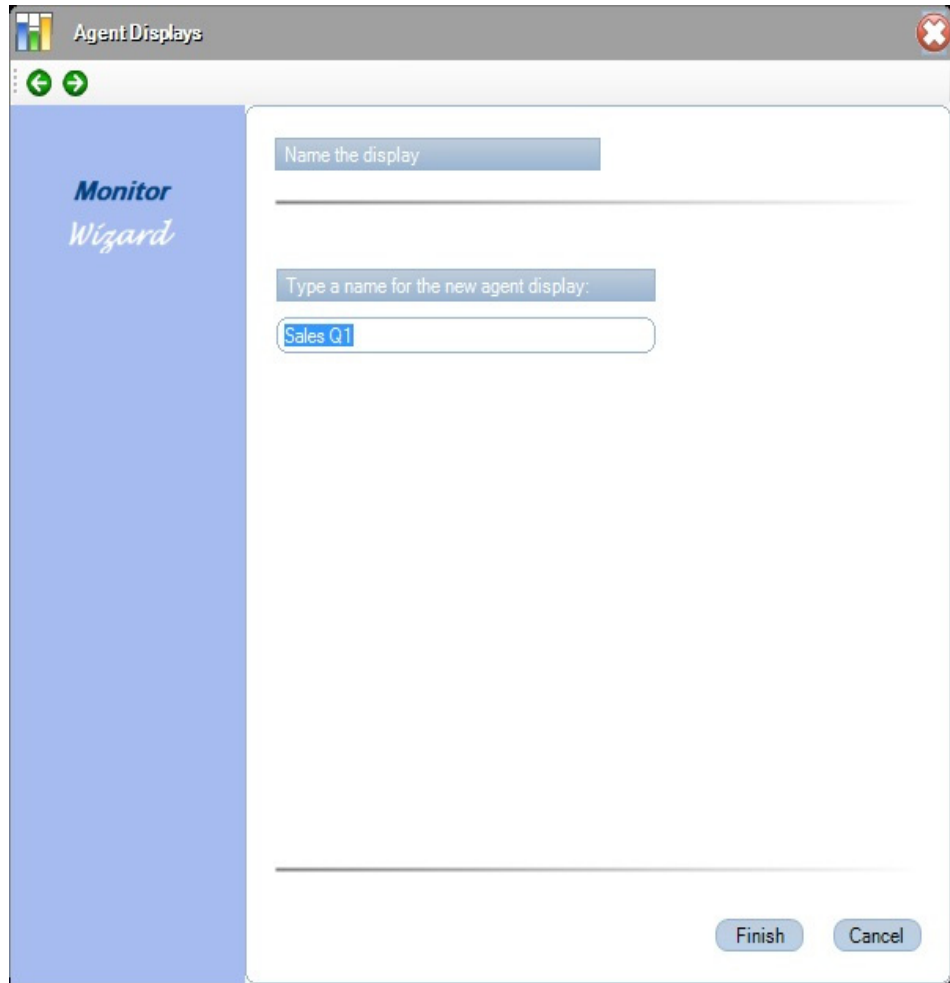


Figure 5-5 Contact Center Monitor Agent Display-Name Display

After the user completes this form and presses the green right arrow in the upper left of the window, the following form is displayed.

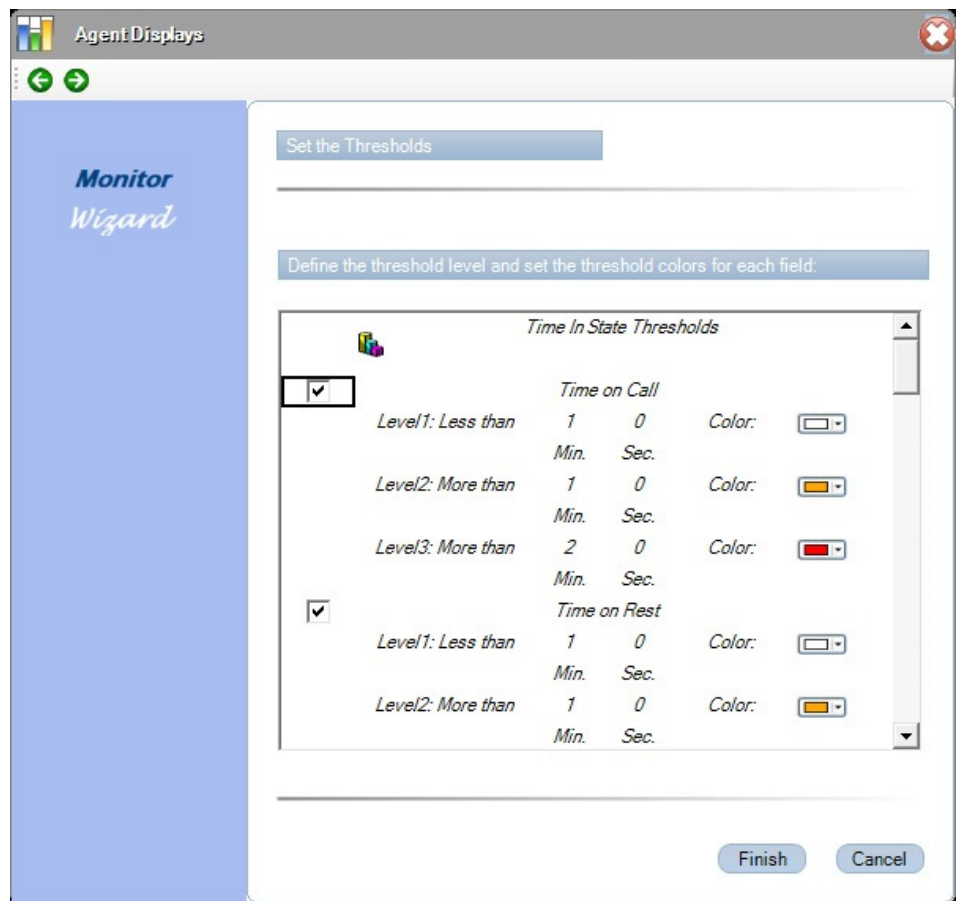


Figure 5-6 Contact Center Monitor Agent Display-Set Thresholds

The threshold menu allows the user to set threshold levels for the specific values in the display. In the case of the Agent State table, the thresholds are associated with the Time In State field, when the agent is in one of three states (Call, Rest, or Wrap). The menu allows the user to define three threshold levels and select the background color to be used in the table cell when the threshold levels are reached.

After the threshold levels are defined, the following menu is displayed.

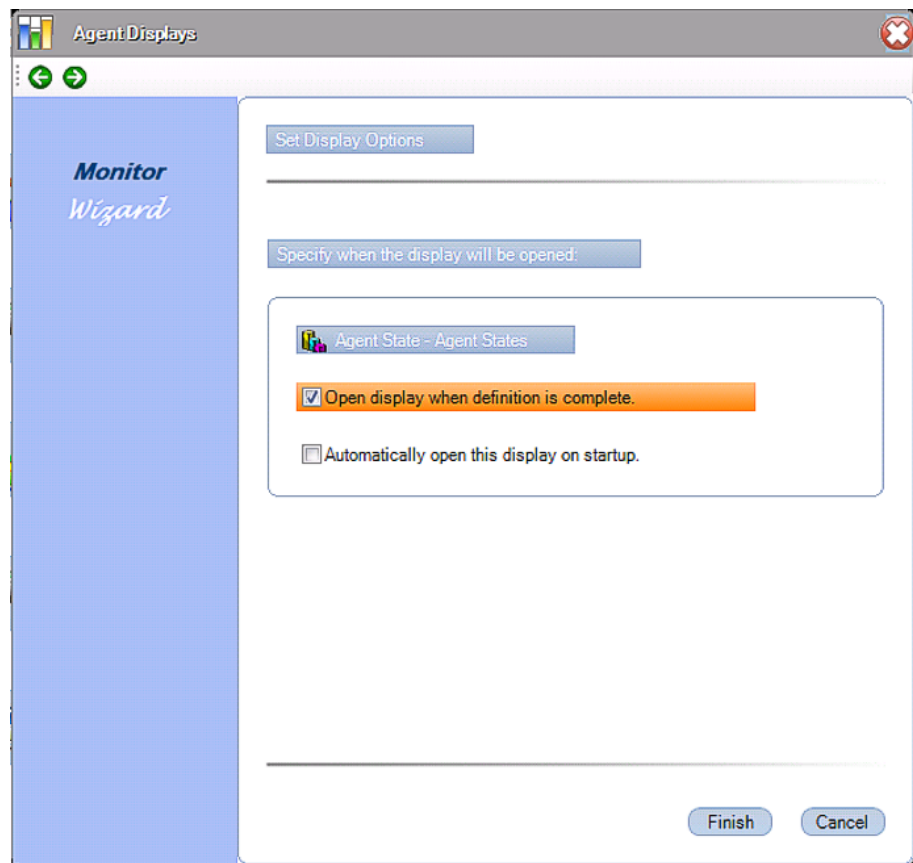


Figure 5-7 Contact Center Monitor Agent Display-Set Display Options

The final step in this definition is to specify when this Agent State table is displayed. If the **Open agent display when definition is complete** option is selected, the table is opened as soon as the user clicks on the **Finish** button.

Additionally, the user can select the **Automatically open this display on startup** option, which opens this Agent State table every time the monitoring utility is started. This allows the supervisor to define a class of default views that are shown automatically when the monitoring application is started.

If the user does not select either of the display options, the Agent State display is created and listed on the defined list of Agent Displays. The user can then open this display by selecting the **Open Agent Display** option from the main menu.

3.2 Queue Displays

When the Queue option is selected on the Monitor main window, the following operations are accessible:

- Open Queue Display
- Modify Existing Queue Display

Two Queue Displays are available:

- Queue 1 Monitor Display
- Queue 2 Monitor Display

The definition and appearance of the display is further described in the following subsections.

3.2.1 Queue Monitor Display

The Queue Monitor Display shows real-time counters that indicate the current state of the queue. The data is presented in a table format with each monitored queue displayed in a different row.



Name	Logged In	Idle	Busy	Calls In Queue	Longest
Q1	3	0	1	1	0:10

Figure 5-8 Contact Center Queue Monitor

Modifying a Queue Monitor Display is accomplished using the following sequence of menus.

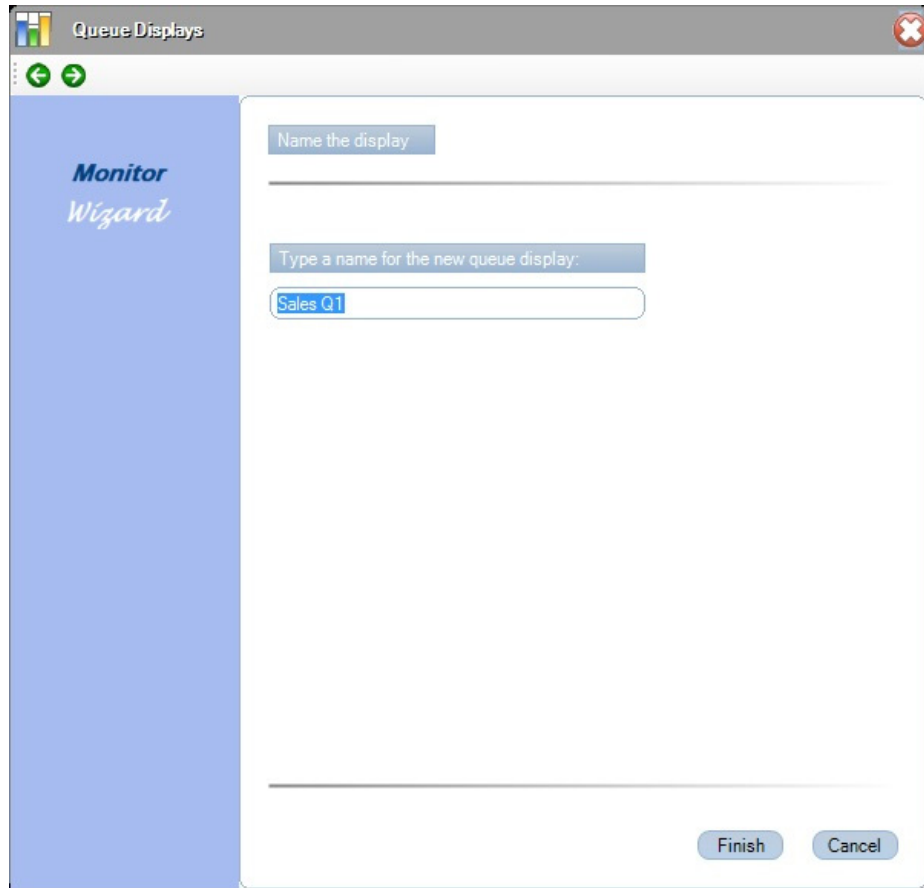


Figure 5-9 Contact Center Monitor-Name New Queue Display

This menu requests the user to enter a name for the queue display. After the user completes this form and presses the green right arrow in the upper left of the screen, the following form is displayed.

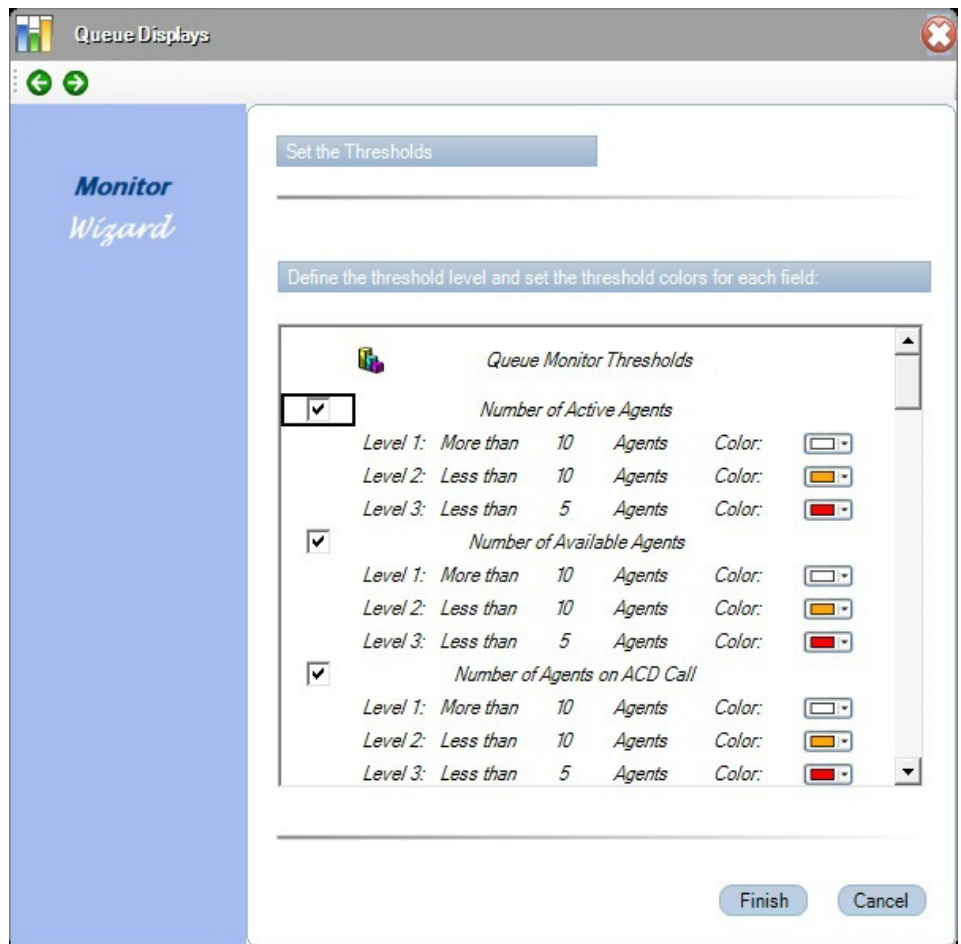


Figure 5-10 Contact Center Monitor Queue Displays-Set Thresholds

The threshold menu allows the user to set three threshold levels for each numeric field and associate a color change with each level.

After the threshold information is defined, the following screen appears. Press the green right arrow in the upper left of the screen.

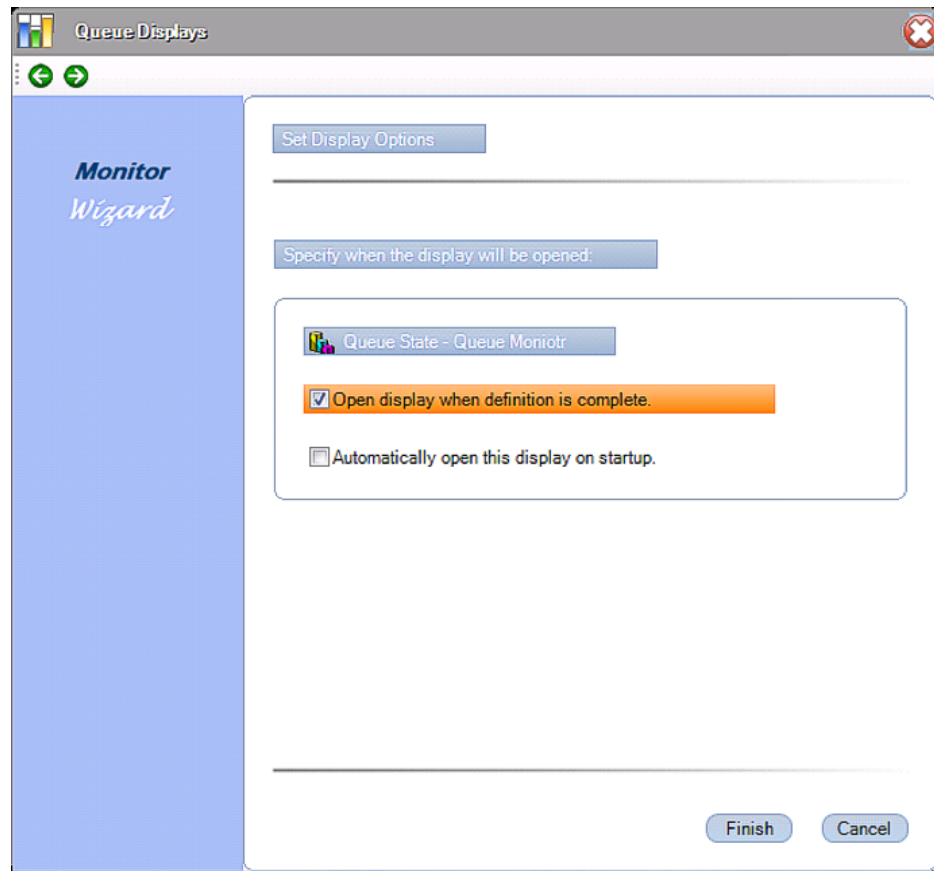


Figure 5-11 Contact Center Monitor Queue Displays-Set Options

The Display Options form allows the user to indicate that an instance of the display should be created when the definition is complete. Also, the user can specify that this display be automatically opened each time that the Contact Center Monitoring application is started. Select the **Finish** button to complete the definition of this Queue Display.

3.3 Display Window Characteristics

As shown in the previous examples, each table or graph that is instantiated in Contact Center Monitor creates a separate window. This approach allows the user to layout the screen exactly as they desire. Individual windows can be resized and positioned within their Windows desktop to achieve the most efficient use of their display.

In addition to being able to reposition the individual windows, the user can modify the following characteristics:

- The width of individual columns within a table can be resized by dragging the edge of the column header.
- The width and height of individual table windows can be changed to increase/decrease the visible portion of the table. If the window size is reduced to a size that is smaller than the defined table, the window includes horizontal and/or vertical scroll bars to allow repositioning of the table in the window.
- The size and position of individual windows are maintained between activations of the Contact Center Monitor application.

3.4 Pull-Down Menus

The Function Menu on the Monitor main screen provides access to commonly used functions for the application. Each function category has an associated drop down menu that lists all available functions in that category. The available categories and functions are as follows:

File

- Exit
- Print Setup: provides printer configuration setup

Tools

- Font Size
- Start-Up Displays
- Contact Center Server Settings

Help

- Contents and Index
- About Contact Center Monitor

These functions are further defined in the following sections:

File Menu

Exit

This closes the Monitor application, including all open display windows. When this function is selected, a confirmation dialog is opened that informs the user that all display windows are closed. This window also has a checkbox control that disables the display of this message in the future.

Tools Menu

Font Size

This function allows the user to change the font size used in all active Monitor displays. When this function is selected, a menu is displayed that provides three selections for font size (Small, Medium, and Large).

Start Up Displays

This function allows the user to alter the collection of displays that are automatically initiated on Startup. When this function is selected a menu is displayed that has two lists. The first list includes all display definitions that are currently initiated at Start Up. The other list shows all other defined display names.

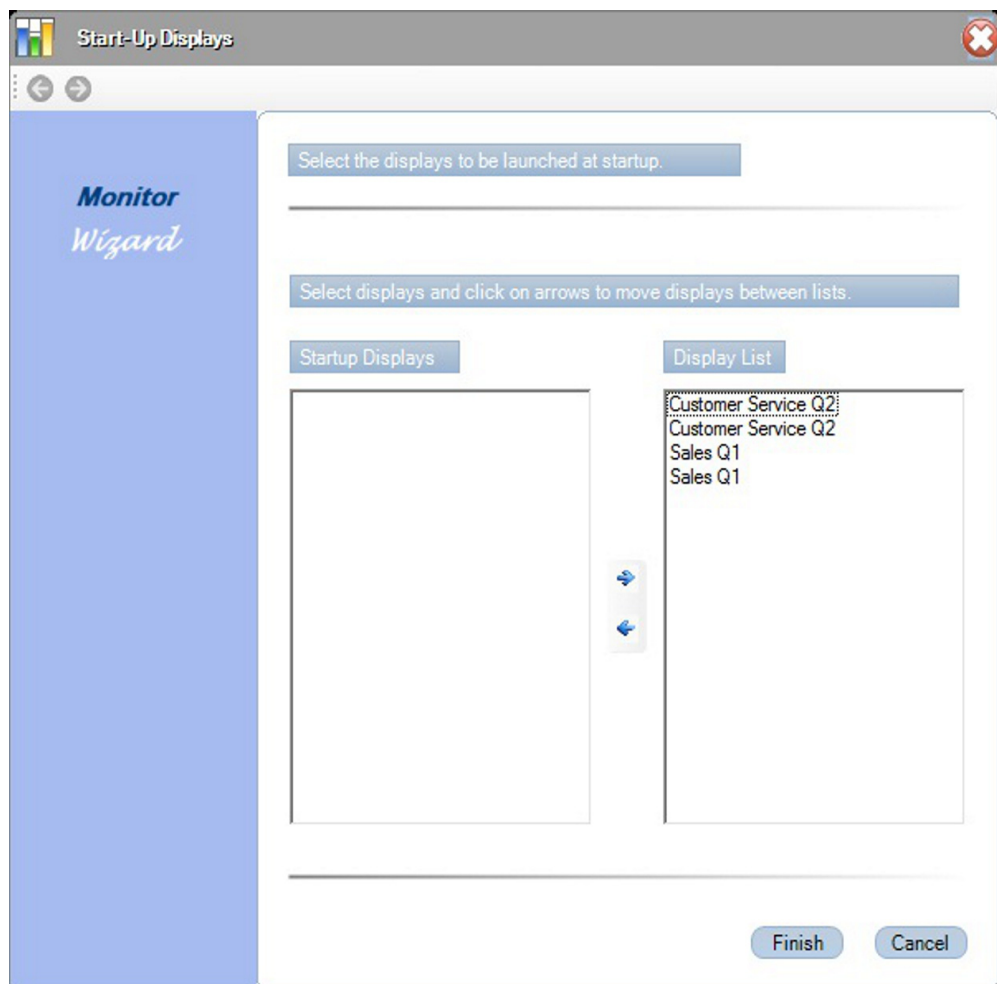


Figure 5-12 Start Up Displays Screen

The Add and Remove buttons is used to transfer elements between the two lists.

Contact Center Server Settings

This function is used to change the settings for the Contact Center Server.

Help Menu

Contents and Index

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

About Contact Center Monitor

The About function displays a form that shows the product name, current version number, and copyright notice.

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Contact Center Reports

SECTION 1 STARTING CONTACT CENTER REPORTS FOR THE FIRST TIME

To start the reports:

1. From the Windows Start menu, choose **Programs**.
2. Select **Reports** from the NEC/Contact Center folder.
3. When Contact Center Reports is started for the first time, the application prompts the user to enter the name/IP address of the Contact Center Server PC (if on same PC as Server enter name as localhost).

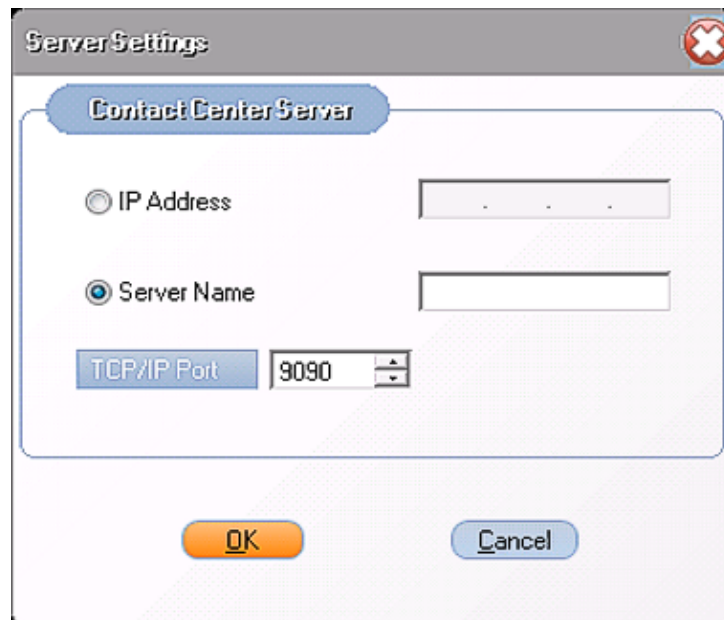


Figure 6-1 Contact Center Server Configuration Screen

- Click the Agent you want to login as, then click **Login**.



Figure 6-2 Contact Center Reports

SECTION 2 DESCRIBING CONTACT CENTER REPORTS MAIN SCREEN

The Contact Center Reports main window provides the user with easy access to the functions required to access the standard reports.

An example of the main window for the Contact Center Reporting application is shown below.

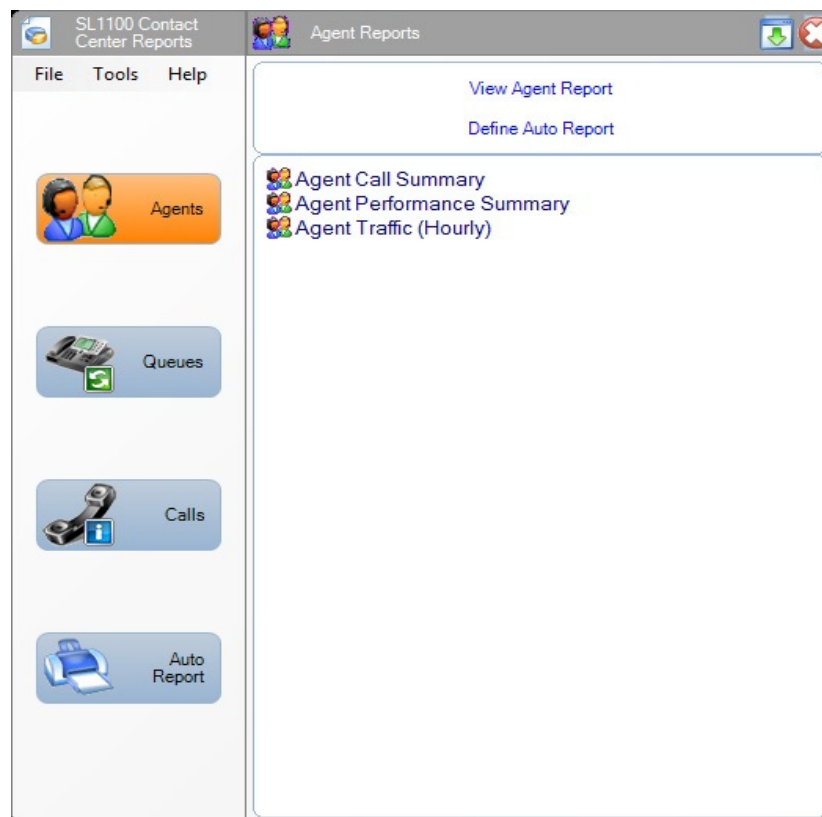


Figure 6-3 Contact Center Reports Main Menu

You can select the type of report to view on the left side of the Contact Center Reports main menu.

Agents	Includes statistics for individual agents
Queues	Includes Statistics accumulated by queue
Calls	Includes detailed call records and abandoned call reports
Auto Report	Lists reports the user has scheduled to be automatically printed

Selecting one of these categories updates the right side of the form to show the operations that can be performed in this category. The user can initiate one of these commands by clicking on the desired action.

The lower half of the form shows the reports that are available in the selected category. The above example lists the report templates that are defined in the Agents category. The main window layouts for the other report categories are presented in subsequent paragraphs.

2.1 Contact Center Reports Display Window

When a report is generated, the requested information is displayed in a new window, as shown below.

Call Summary By Queue						
12/10/2014 - 12/10/2014						
12:00 AM - Midnight						
Group	Calls Offered	Calls Answered	Calls Abandoned	Avg Call Length	Avg Wait Time	Longest Wait
Q1	4	3	1	0:42	0:09	0:13
Que 2	1	1	0	0:41	0:14	0:14

Figure 6-4 Queue Reports - Call Summary By Queue

If the report is too large to fit in the window, horizontal and/or vertical scroll bars are available to reposition the report. Under the **File** option on the menu bar, the user can select **Print**, **Print Preview** or **Exit**. The Print command opens the standard Windows Print dialog, which is used to send the report to a printer. The Exit command closes this Contact Center Reports viewer window. Each report is shown in a separate report viewer window.

2.2 Agent Reports

When the **Agents** option is selected, the Contact Center Reports main menu appears as shown in Section, Contact Center Reports Main Screen. In this menu, the following operations are accessible:

- View Agent Report
- Define Auto Print Report

The Contact Center Reports utility allows the user to generate three different agent reports:

- Agent Performance Summary
- Agent Traffic (Hourly)
- Agent Call Summary

2.2.1 Agent Performance Summary

This report helps a supervisor analyze how efficiently agents are handling calls.

Name/ID	ACD Calls	Avg ACD Call	Wrap Count	Avg Wrap	Rest Count	Avg Rest	Non-ACD Call Count	Avg Non-ACD
Denise - 1015	2	0:35	2	0:16	0	0:00	1	0:13
Justin - 1002	1	0:57	1	0:15	1	0:21	0	0:00
Martin - 1001	1	0:41	0	0:00	1	0:02	0	0:00

Figure 6-5 Agent Reports - Agent Performance Summary

The user may also have the information presented in a graph format.

2.2.2 Agent Performance Summary Report Generation

To create a new Agent Performance summary report, the user selects the **View Agent Report** option from the main Contact Center Reports window, or double-clicks on the Agent Performance Summary selection in the lower half of the main screen. When this operation is selected, the following series of data entry forms is presented which guide the user through the report generation process.

These reports are defined in the following paragraphs.

The first form to be displayed prompts the user to select the agents that are included in the report.

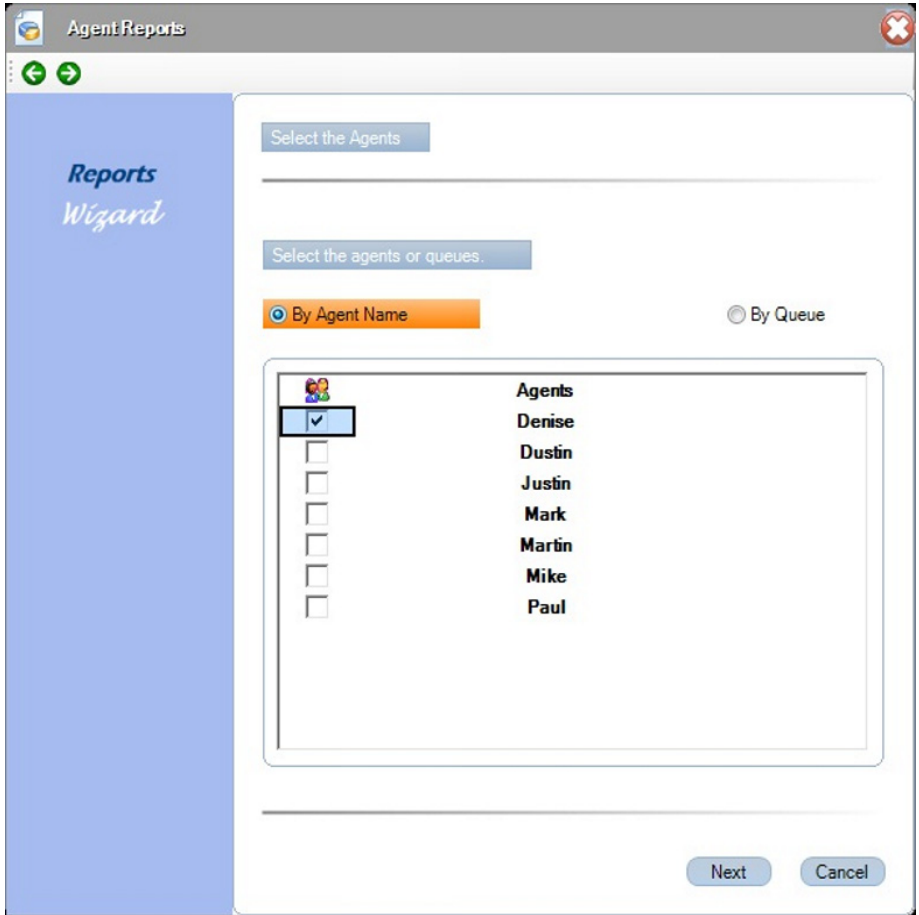


Figure 6-6 Agent Reports - Select Agents

The user specifies the agent list by either selecting a queue or individual agents. If a queue or all queues is selected, each agent that was active in the selected queue(s) during the reporting period is included in the report.

After the agent list is completed, the following screen is displayed.

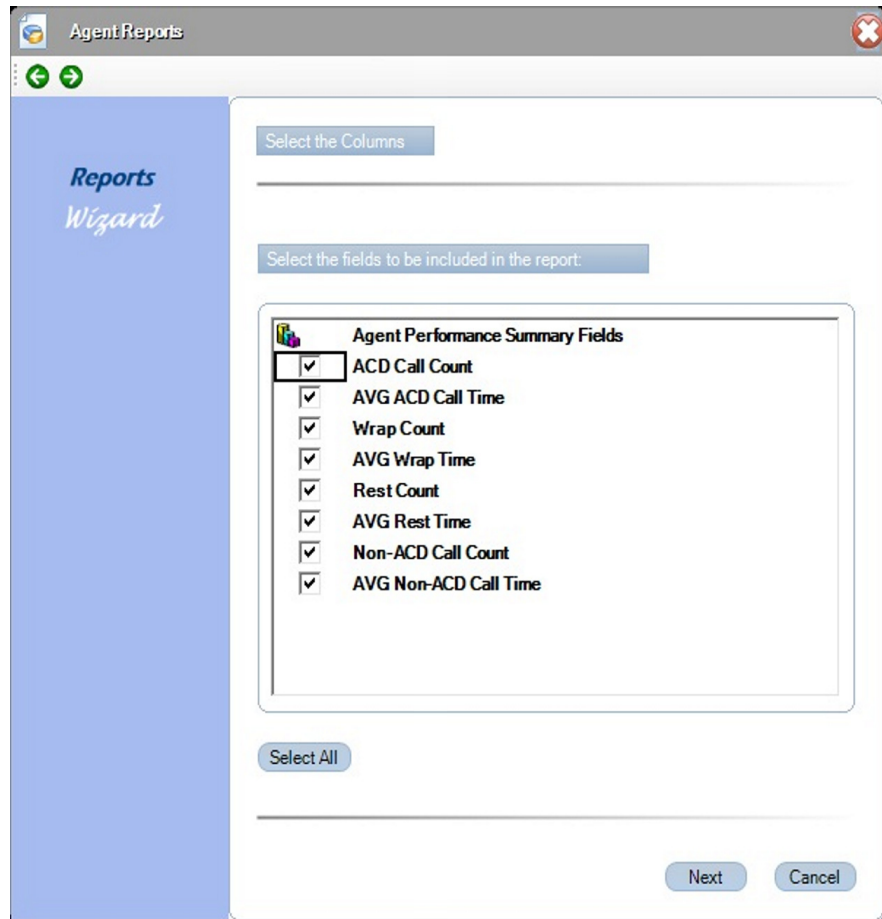


Figure 6-7 Agent Reports - Select Columns

The user specifies the fields or columns to be included in the report.

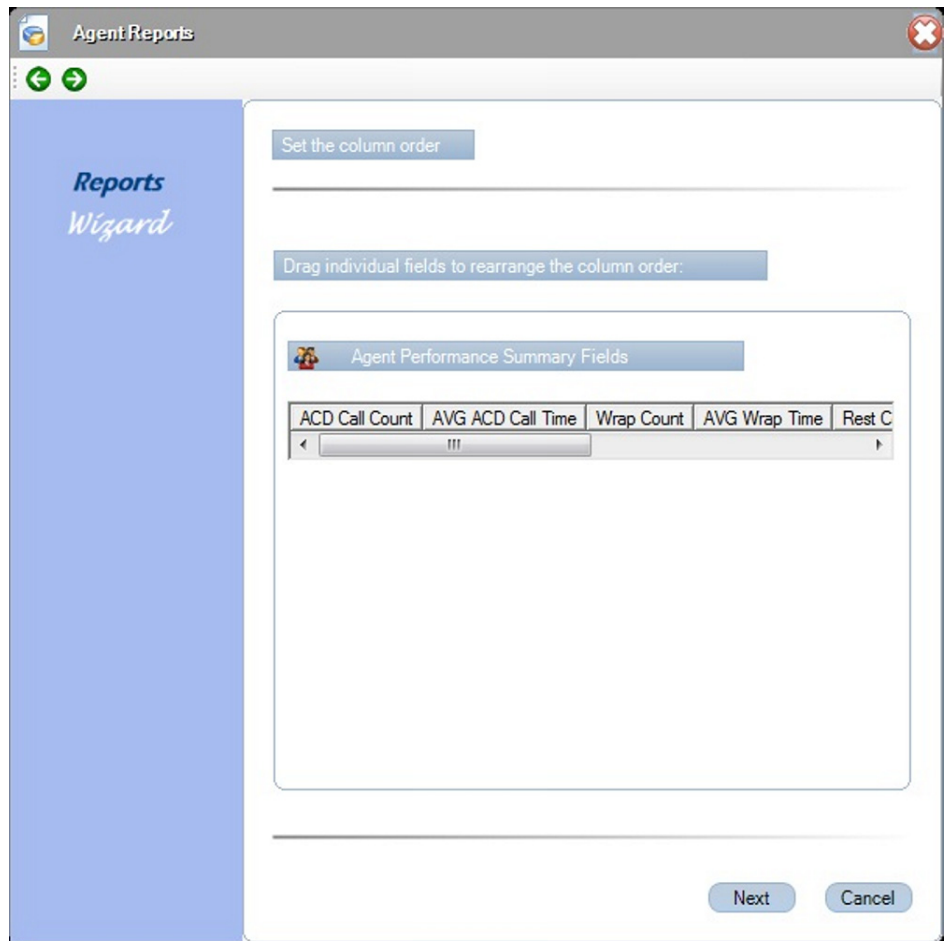
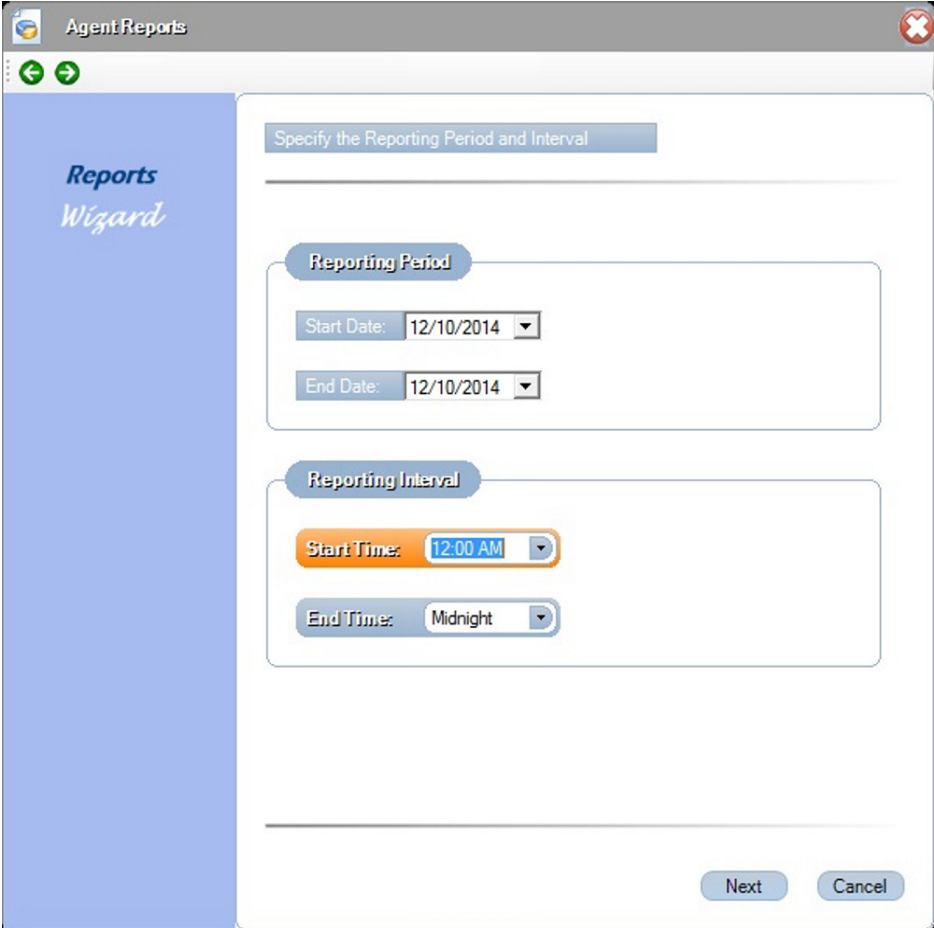


Figure 6-8 Agent Reports - Set Column Order

Drag the individual fields to rearrange the column order.



The screenshot shows a software window titled "Agent Reports" with a "Reports Wizard" sidebar on the left. The main area is titled "Specify the Reporting Period and Interval". It contains two sections: "Reporting Period" and "Reporting Interval".

Reporting Period:

- Start Date: 12/10/2014
- End Date: 12/10/2014

Reporting Interval:

- Start Time: 12:00 AM
- End Time: Midnight

At the bottom right, there are "Next" and "Cancel" buttons.

Figure 6-9 Agent Reports - Specify Reporting Period

This menu allows the user to specify the date range to be included in this report. The user can enter a specific start and end date or click the date entry field to use an interactive calendar control to select the dates.

The report generator uses all data available in the specified dates (inclusive).

The time interval menu allows the user to specify the working hours to be included in the report. For the Start Time and End Time fields, the user can use the up/down control to vary each element of the time field (hours, minutes, AM/PM).

After the user selects the reporting period, the following menu is displayed.

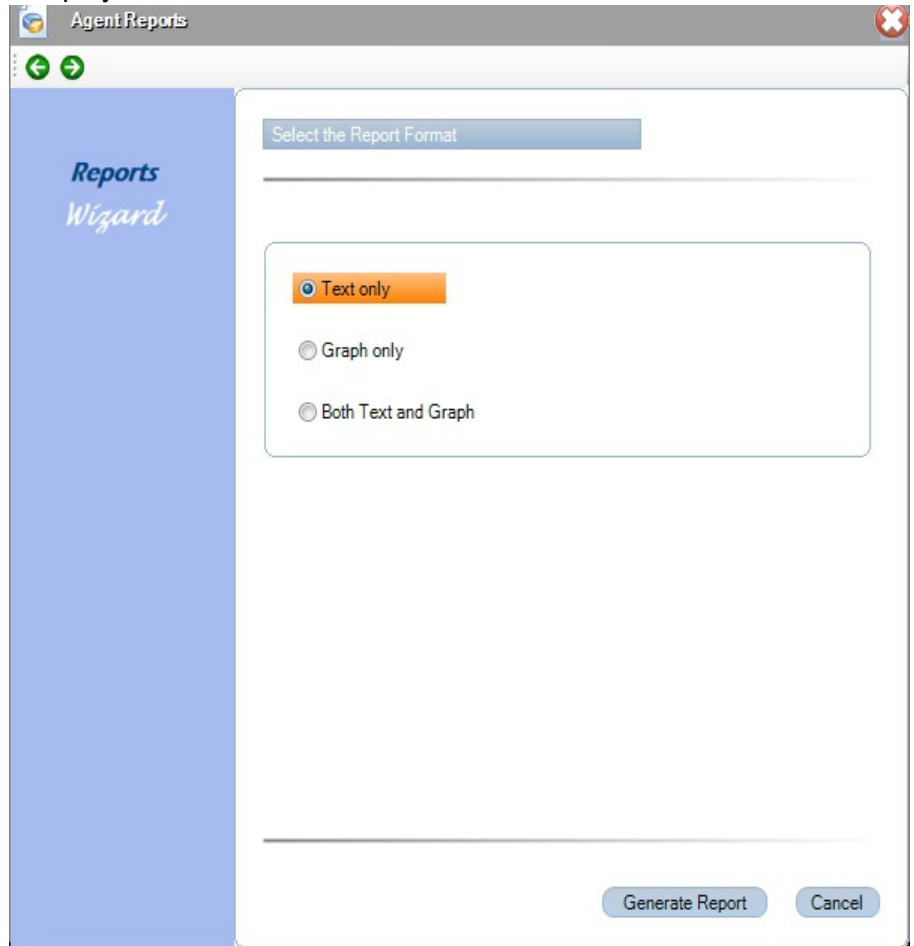


Figure 6-10 Agent Reports - Specify Report Format

This menu allows the user to specify whether the report presents the data in Text format, Graph format or Both Text and Graph format.

2.2.3 Agent Traffic (Hourly)

This report helps a supervisor analyze the peak traffic patterns during the workday.

Agent Traffic (Hourly)									
12/10/2014 - 12/10/2014									
8:00 AM - 5:00 PM									
Name/ID	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM
Denise - 1015	0	2	0	0	0	0	0	0	0
Justin - 1002	0	1	0	0	0	0	0	0	0
Martin - 1001	0	1	0	0	0	0	0	0	0

Figure 6-11 Agent Reports - Agent Traffic (Hourly)

The user may also have the information presented in a graph format.

2.2.4 Agent Traffic (Hourly) Report Generation

To create a new Agent Traffic (Hourly) report, the user selects the **View Agent Report** option from the main Contact Center Reports window, or double-clicks on the Agent Traffic (Hourly) selection in the lower half of the main screen. When this operation is selected, the following series of data entry forms is presented which guide the user through the report generation process.

Select the agents – Same menu described in Agent Performance Summary example.

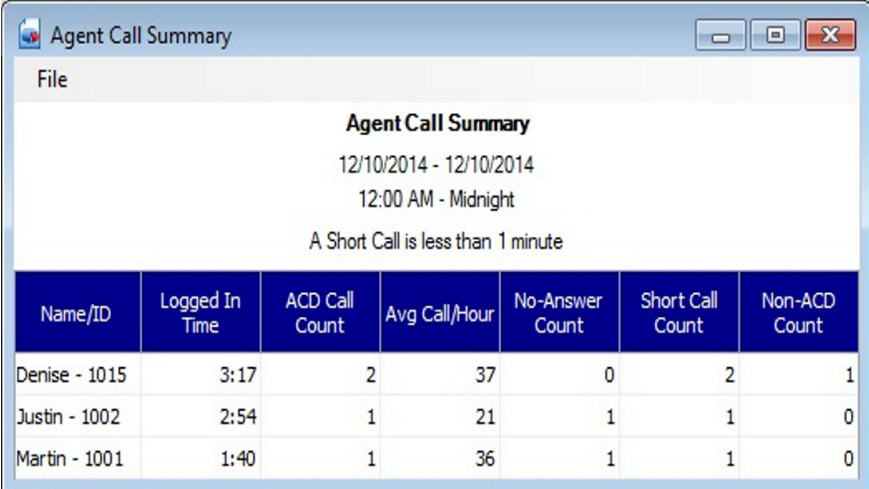
Specify the reporting period – Same menu described in Agent Performance Summary example.

Set the Time Interval – Same menu described in Agent Performance Summary example.

Select the report format – Same menu described in Agent Performance Summary example.

2.2.5 Agent Call Summary

This report helps a supervisor identify any potential agent issue that might require additional training.



Name/ID	Logged In Time	ACD Call Count	Avg Call/Hour	No-Answer Count	Short Call Count	Non-ACD Count
Denise - 1015	3:17	2	37	0	2	1
Justin - 1002	2:54	1	21	1	1	0
Martin - 1001	1:40	1	36	1	1	0

Figure 6-12 Agent Reports - Agent Call Summary

No graphing option is available for this report.

To create a new Agent Call Summary report, the user selects the **View Agent Report** option from the main Contact Center Reports window or double-clicks on the Agent Call Summary selection in the lower half of the main screen. When this operation is selected, the following series of data entry forms is presented which guide the user through the report generation process.

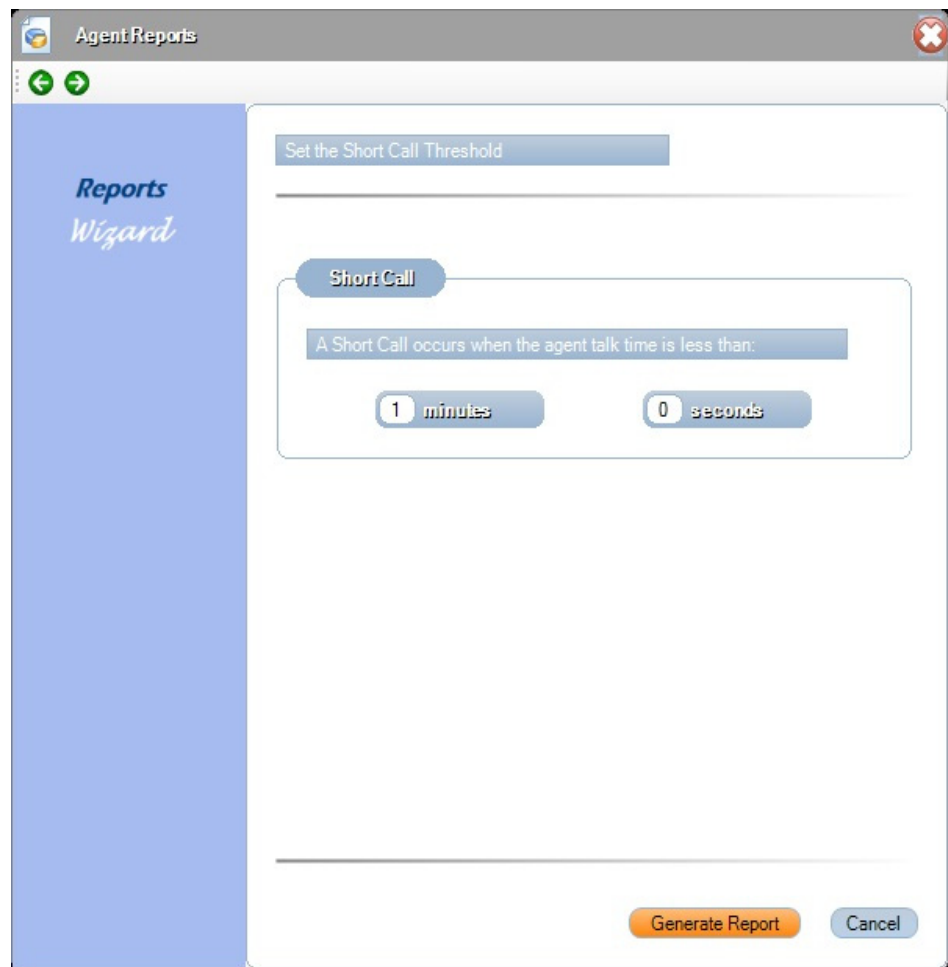
Select the agents – Same menu described in Agent Performance Summary example.

Specify the reporting period – Same menu described in Agent Performance Summary example.

Set the Time Interval – Same menu described in Agent Performance Summary example.

Select the Short Calls Threshold – The report generator can count the number of short calls that are handled by each agent. A short call is identified as an Contact Center call that has a talk time less than a defined threshold.

The user specifies the short call threshold as part of the report definition process in the following form.



The screenshot shows a software window titled "Agent Reports" with a "Reports Wizard" sidebar on the left. The main content area is titled "Set the Short Call Threshold". Below this title is a horizontal line. A "Short Call" tab is selected, and a text box contains the instruction: "A Short Call occurs when the agent talk time is less than:". Below this text box are two input fields: "1 minutes" and "0 seconds". At the bottom right of the window are two buttons: "Generate Report" (orange) and "Cancel" (blue).

Figure 6-13 Agent Reports - Set Short Call Threshold

The user enters a numeric value in the field to indicate the threshold for short calls. Any call whose talk time is less than the specified value is counted as a short call.

2.3 Queue Reports

When the **Queue** option is selected, the Contact Center Reports main window appears as follows:

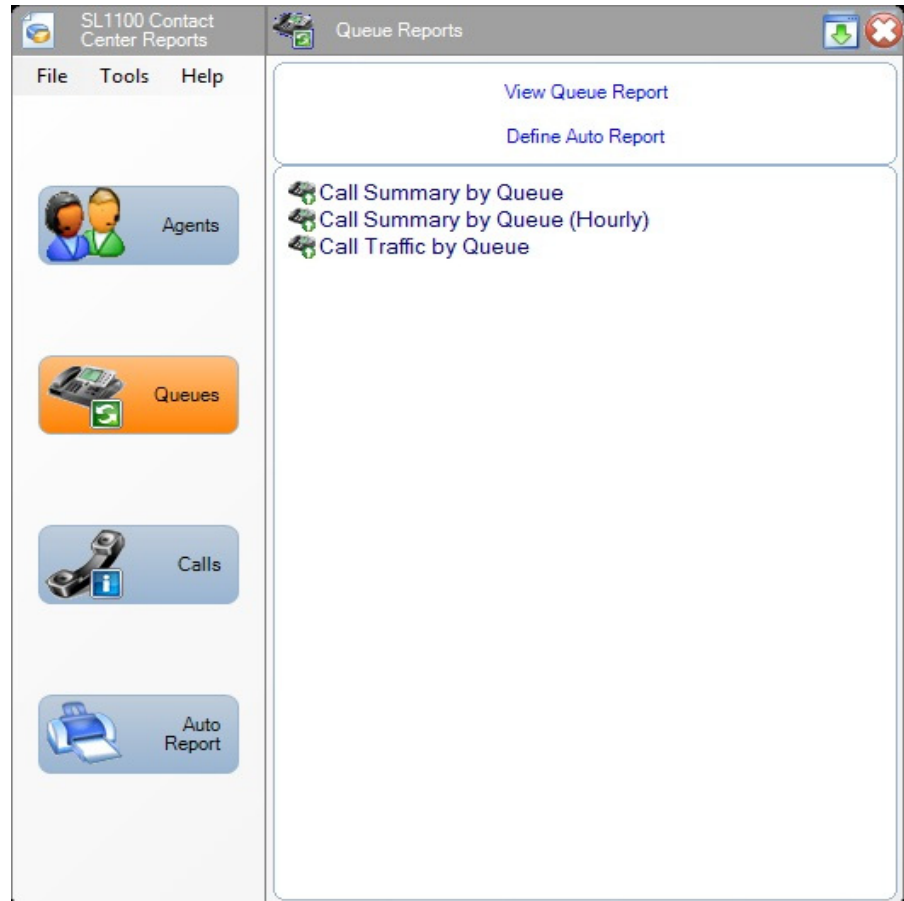


Figure 6-14 Queue Reports Main Menu

From this menu, the following operations are available:

- View Queue Report
- Define Auto Print Report

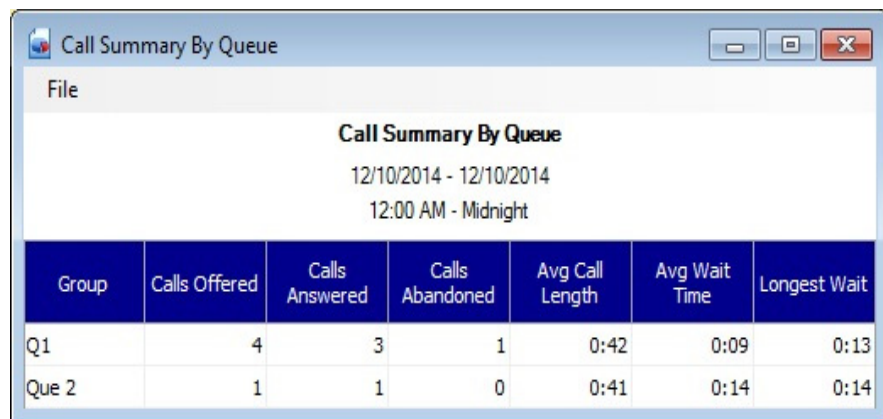
Three Queue Reports are available:

- Call Summary by Queue
- Call Summary by Queue (Hourly)
- Call Traffic by Queue

The definition and appearance of each display are further described in the following subsections.

2.3.1 Call Summary by Queue

This report indicates the call distribution and overall performance in the call center.



Group	Calls Offered	Calls Answered	Calls Abandoned	Avg Call Length	Avg Wait Time	Longest Wait
Q1	4	3	1	0:42	0:09	0:13
Que 2	1	1	0	0:41	0:14	0:14

Figure 6-15 Queue Reports - Call Summary by Queue

This report does not have a graphing option.

2.3.2 Call Summary by Queue Definition

Defining a Call Summary by Queue report is accomplished using the following sequence of menus.

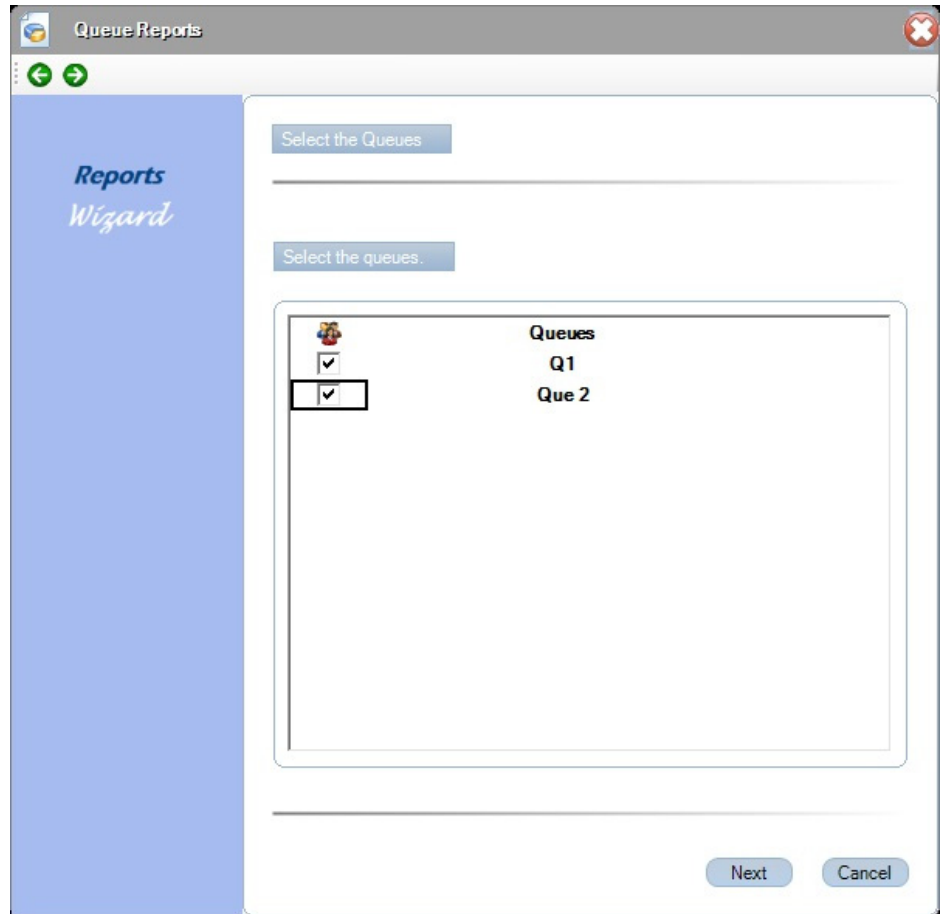


Figure 6-16 Queue Reports - Select Queues

This menu allows the user to select the queue(s) that are included in this report. Each queue is shown on a single row in the resulting table.

After the queue list is completed, the following screen is displayed.

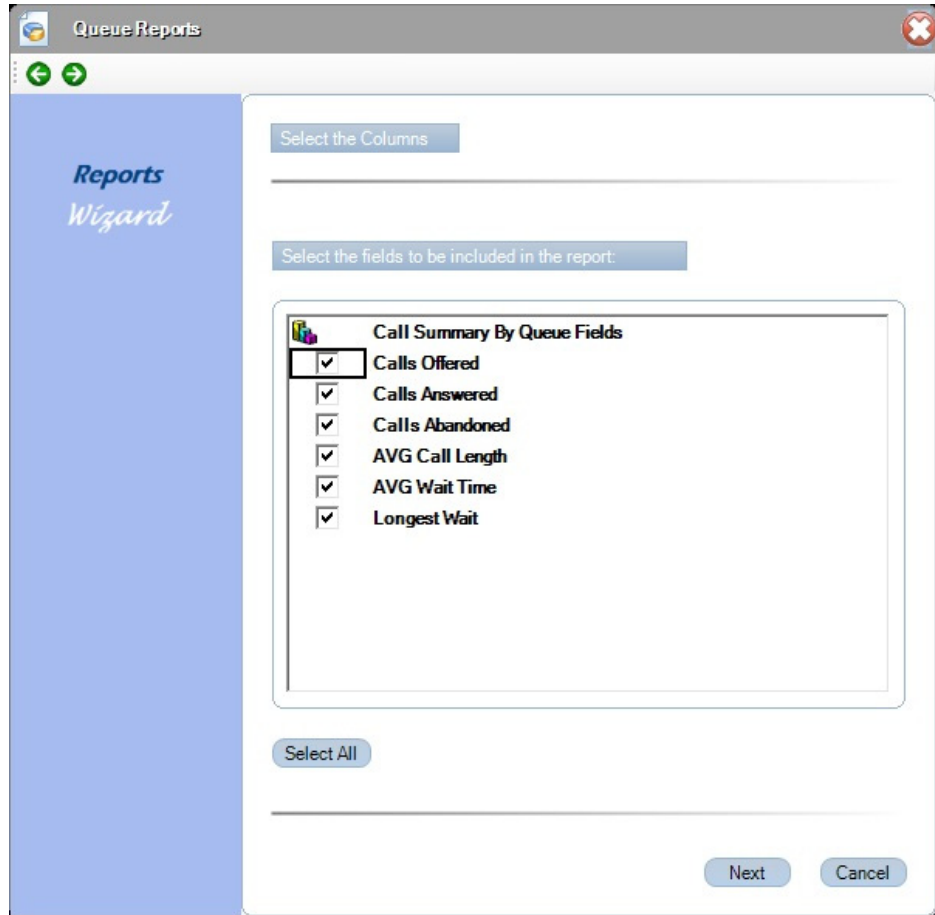


Figure 6-17 Queue Reports - Select Columns

The user specifies the fields or columns to be included in the report.

After column selection is completed, the following screen is displayed.

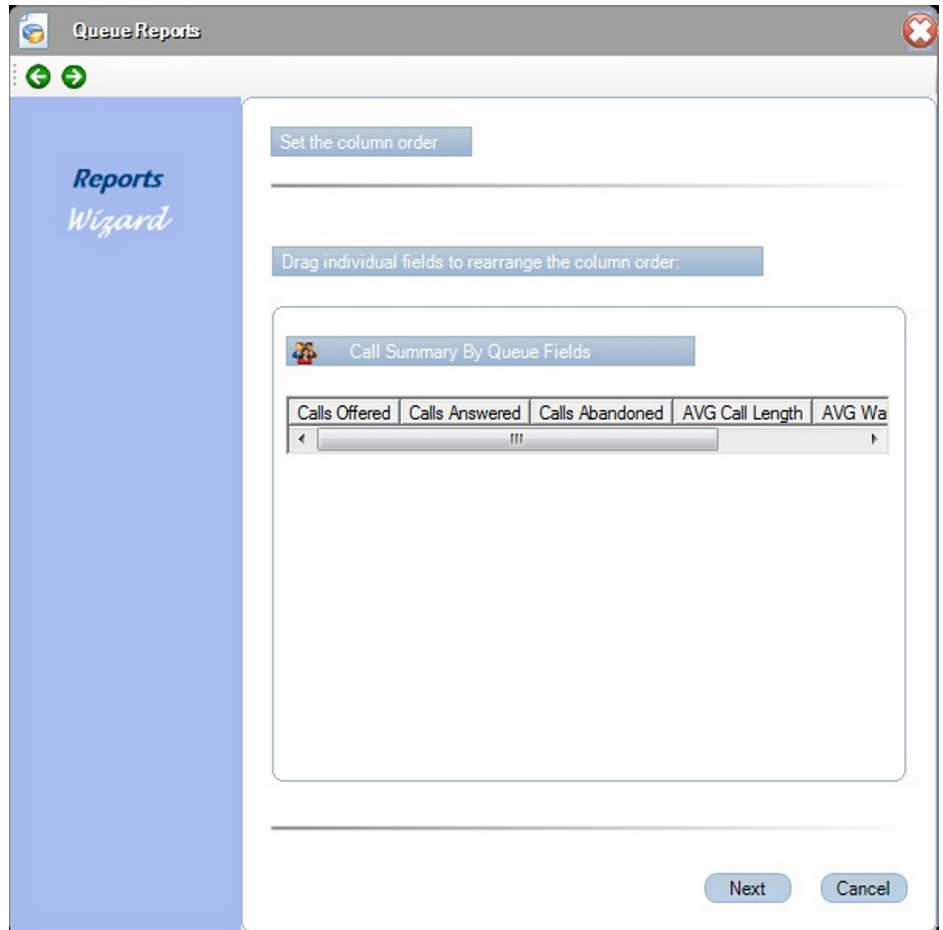


Figure 6-18 Queue Reports - Set Column Order

Drag individual fields to rearrange column order.

After the queues are selected, the following screen is displayed.

The screenshot shows a software window titled "Queue Reports". On the left side, there is a blue sidebar with the text "Reports Wizard" and two green arrows (back and forward). The main content area is titled "Specify the Reporting Period and Interval". It contains two sections: "Reporting Period" and "Reporting Interval". The "Reporting Period" section has two dropdown menus: "Start Date" and "End Date", both set to "12/10/2014". The "Reporting Interval" section has two dropdown menus: "Start Time" set to "12:00 AM" and "End Time" set to "Midnight". At the bottom right of the window, there are two buttons: "Generate Report" and "Cancel".

Figure 6-19 Queue Reports - Specify Reporting Period

This menu allows the user to specify the date range that is included in this report. The user can enter a specific start and end date, or click on the date entry field to use an interactive calendar control to select the dates. The report generator uses all data available during the specified dates (inclusive).

The time interval menu allows the user to specify the working hours that are included in the report. For the Start Time field and End Time field, the user can up/down control to vary each element of the time field (hour, minutes, AM/PM).

Clicking on Generate Report builds the requested report and displays the results in the report viewer window.

2.3.3 Call Summary By Queue (Hourly)

This report provides an hourly call summary by queue.

	8 AM 01	9 AM 01	10 AM 01	11 AM 01	12 PM 01	1 PM 01	2 PM 01	3 PM 01	4 PM 01	5 PM 01
Calls Offered	0	4	0	0	0	0	0	0	0	0
Calls Answered	0	3	0	0	0	0	0	0	0	0
Calls Abandoned	0	1	0	0	0	0	0	0	0	0
Avg Call Length	0:00	0:42	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Avg Wait Time	0:00	0:09	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Longest Wait	0:00	0:13	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00

Figure 6-20 Call Summary by Queue (Hourly)

The graphing option for this report allows the user to select between graphing the call counts and graphing the averages. In both cases the horizontal axis of the graph shows the selected hours.

Defining the Call Summary by Queue (Hourly) Report is accomplished using the following sequence of menus.

Select the Queues – Same menu described in Call Summary by Queue example.

Specify the Columns/Fields – Same menu described in Call Summary by Queue example.

Specify the Column Order – Same menu described in Call Summary by Queue example.

Specify the reporting period – Same menu described in Call Summary by Queue example.

Set the Time Interval – Same menu described in Call Summary by Queue example, except the Generate Report button is replaced by the Next button.

Select the report format – The following menu allows the user to select the format for the report.

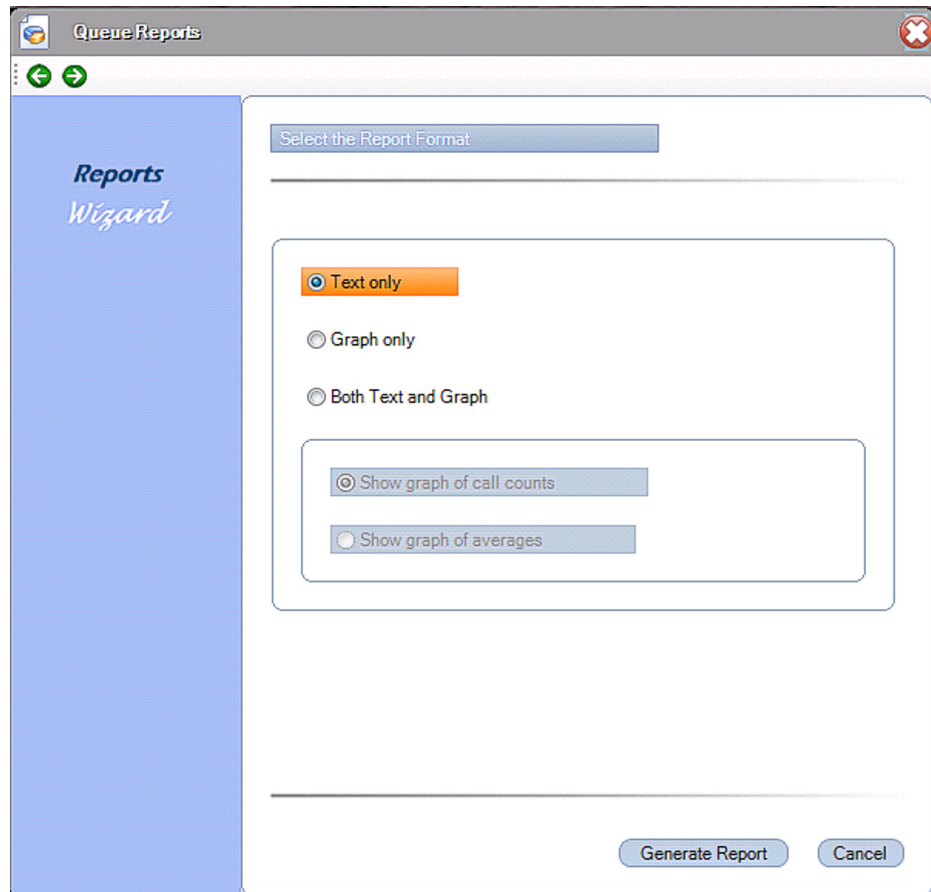


Figure 6-21 Queue Reports - Select Report Format

This menu allows the user to specify whether the report presents the data in Text Format, Graph Format or Both Text and Graph Format. If the graphing option is used, the user can specify whether the call count fields or the averages are graphed.

2.3.4 Call Traffic by Queue Format

This report evaluates the call volume that is handled by the call center.

The screenshot shows a window titled "Call Traffic By Queue" with a menu bar containing "File". The main content area displays the report title "Call Traffic By Queue", the date range "12/10/2014 - 12/10/2014", and the time interval "12:00 AM - Midnight". Below this is a table with the following data:

Name	Calls Offered	Calls Answered	Calls Abandoned	Overflowed Out	Overflowed In
Q1	4	3	1	0	0
Que 2	1	1	0	0	0

Figure 6-22 Queue Reports - Call Traffic by Queue

Defining the Call Traffic by Queue report is accomplished using the following sequence of menus.

Select the Queues – Same menu described in Call Summary by Queue example.

Specify the Columns/Fields – Same menu described in Call Summary by Queue example.

Specify the Column Order – Same menu described in Call Summary by Queue example.

Specify the reporting period – Same menu described in Call Summary by Queue example.

Set the Time Interval – Same menu described in Call Summary by Queue example, except the Generate Report button is replaced by the Next button.

Select the report format – The following menu allows the user to select the format for the report.

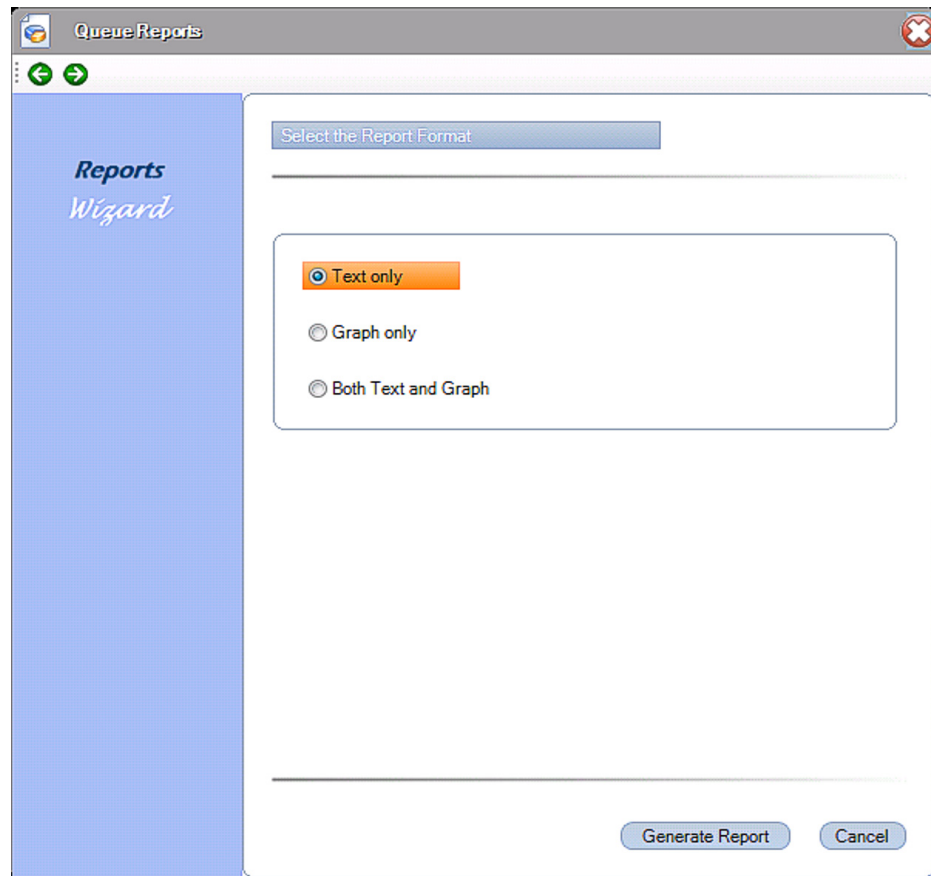


Figure 6-23 Queue Reports - Select Report Format

This menu allows the user to specify if the report presents the data in Text Format, Graph Format or Both Text and Graph Format.

2.4 Call Reports

When the **Calls** option is selected, the Contact Center Reports main window appears as follows:

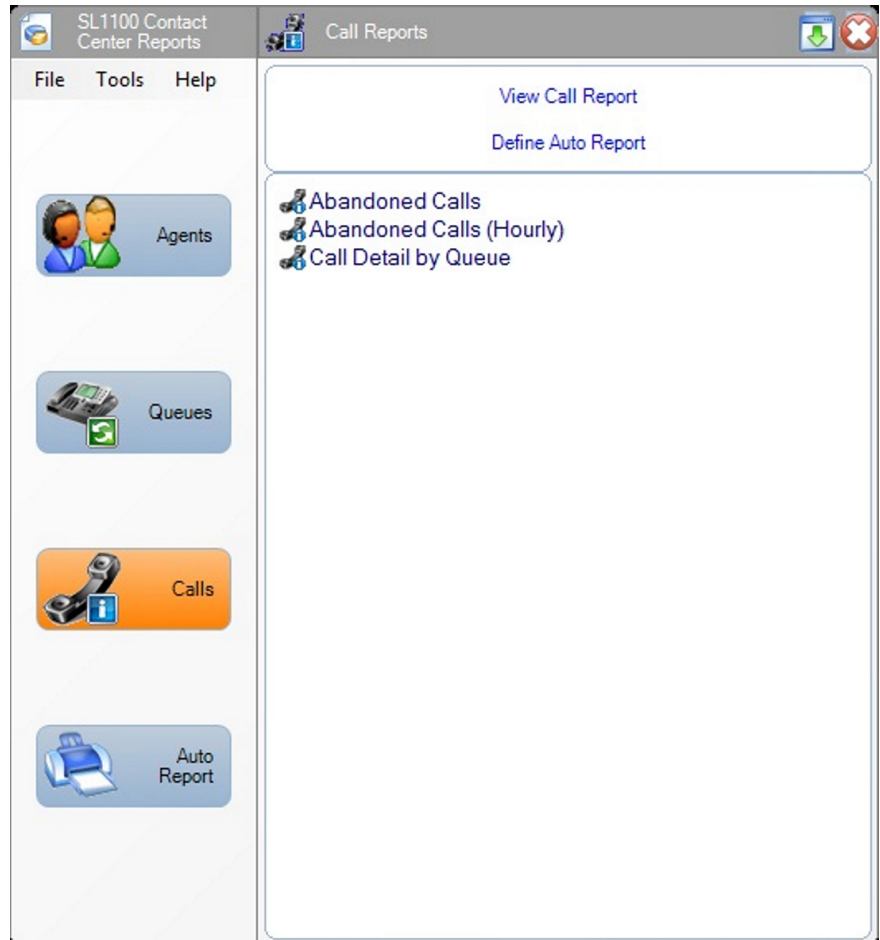


Figure 6-24 Contact Center Call Reports Main Menu

From this menu, the following operations are available:

- View Call Report
- Define Auto Print Report

Three Queue Reports are available:

- Call Detail by Queue
- Abandoned Calls
- Abandoned Calls (Hourly)

The definition and appearance of each display are further described in the following subsections.

2.4.1 Call Detail by Queue Report

This report tracks down a particular call, given the approximate time of the call.

The following table shows an example of a Call Detail by Queue report.

The screenshot shows a window titled "Call Detail By Queue" with a menu bar containing "File". Below the menu bar, the window title "Call Detail By Queue" is repeated, followed by the date range "12/10/2014 - 12/10/2014" and the time range "12:00 AM - Midnight". A table with 8 columns is displayed below:

Date	Record Locator	Caller ID	Arrival Time	Answer Time	Agent	Group	End Time
12/10/2014	201412-46	2142622001	9:15:13 AM			Q1	9:15:22 AM
12/10/2014	201412-48	2142622000	9:16:09 AM	9:16:22 AM	Denise - 1015	Q1	9:16:41 AM
12/10/2014	201412-49	2142622001	9:16:46 AM	9:16:55 AM	Justin - 1002	Q1	9:17:52 AM
12/10/2014	201412-50	2142622000	9:16:53 AM	9:16:59 AM	Denise - 1015	Q1	9:17:50 AM

Figure 6-25 Call Detail by Queue

Clicking on an individual call record opens up a new window that shows the details for that individual call.

The screenshot shows a window titled "Individual Call Detail" with a menu bar containing "File". Below the menu bar, the window title "Individual Call Detail" is repeated. A table with 6 columns is displayed below:

Date	Record Locator	Caller ID	Event	Time	Destination
12/10/2014	201412-48	2142622000	Arrival	9:16:09 AM	Q1
			Ringing	9:16:09 AM	Justin - 1002
			In Queue	9:16:19 AM	Q1
			Ringing	9:16:19 AM	Denise - 1015
			Answer	9:16:22 AM	Denise - 1015
			End Call	9:16:41 AM	

Figure 6-26 Individual Call Detail

This report does not have a graphing option.

Defining a Call Detail by Queue report is accomplished using the following sequence of menus.

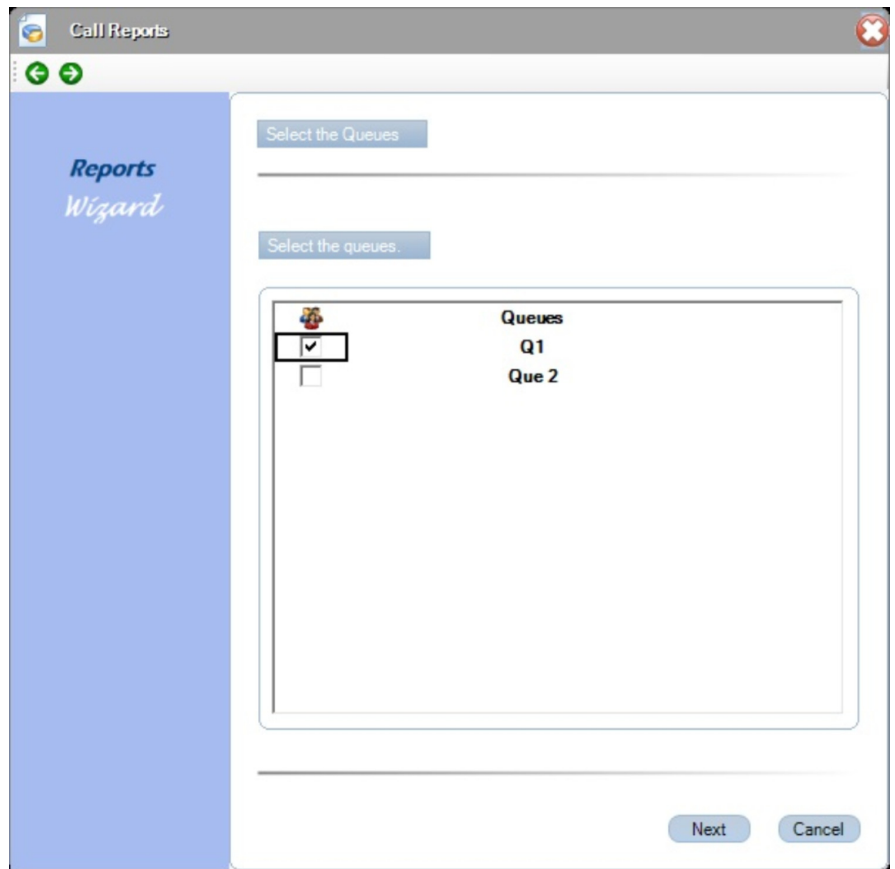


Figure 6-27 Call Reports - Select the Queues

This menu allows the user to select the queues that are included in this report. All calls that arrive at a selected queue within the reporting period are included.

After the queue list is completed, the following screen is displayed.

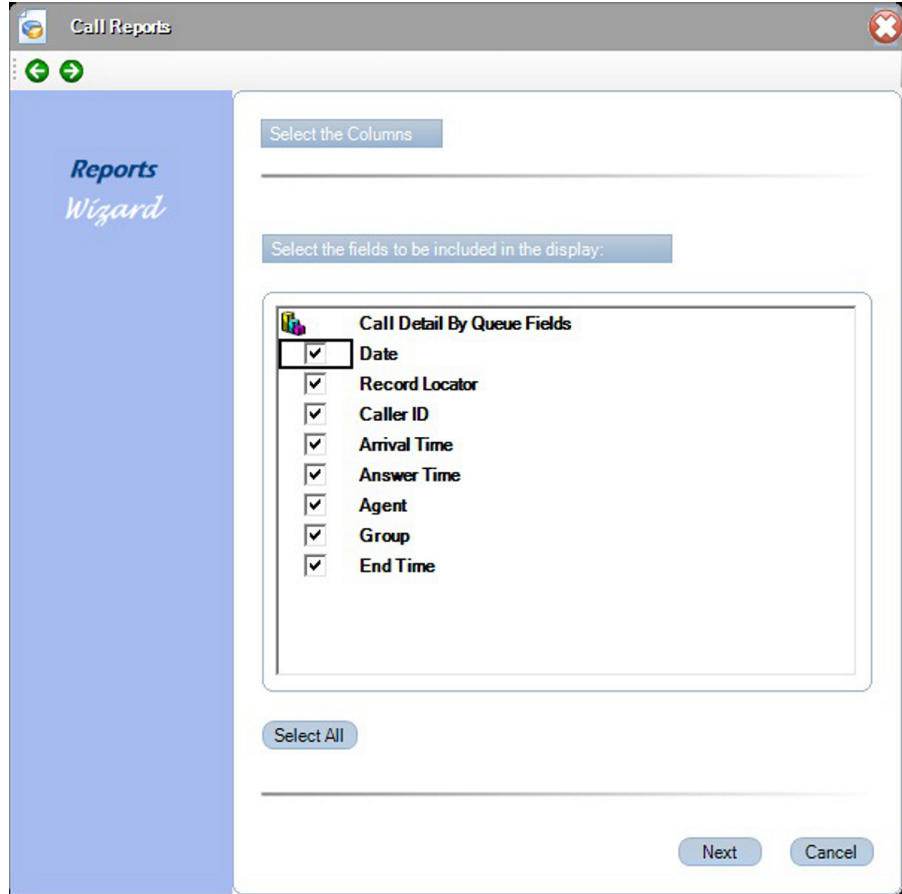


Figure 6-28 Call Reports - Select Columns

The user specifies the fields or columns to be included in the report.

After column selection is completed, the following screen is displayed.

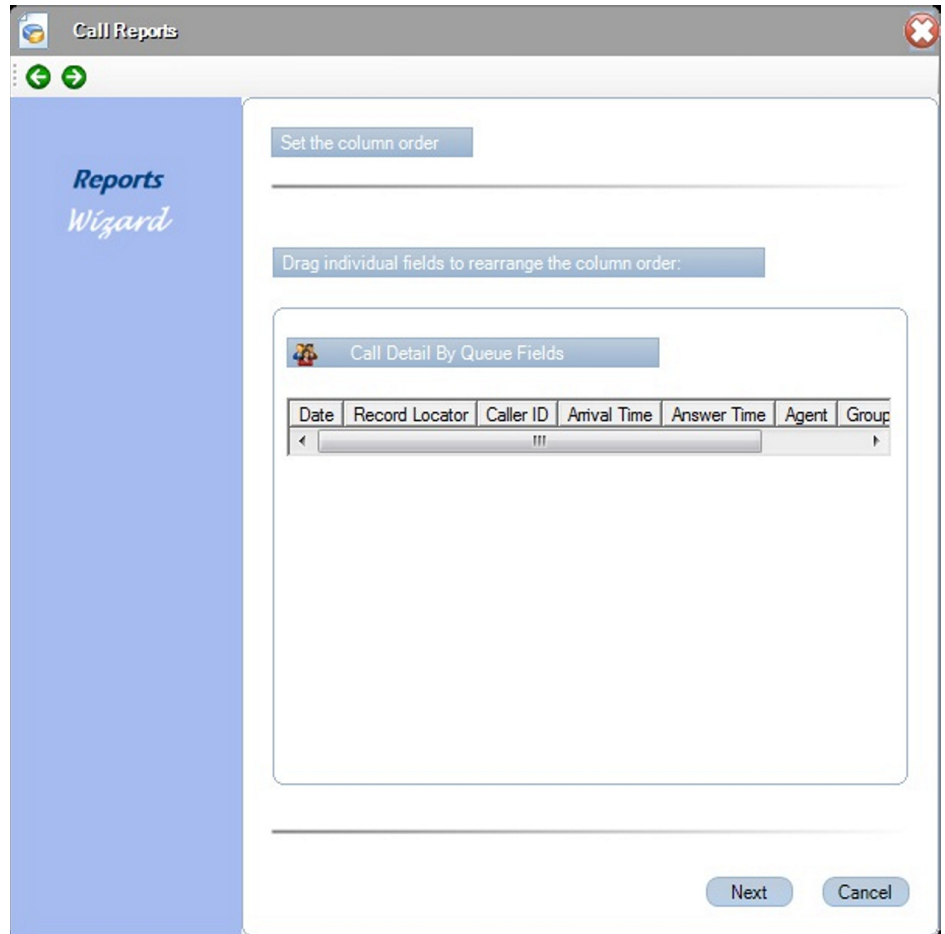


Figure 6-29 Call Reports - Set Column Order

Drag individual fields to rearrange column order.

After the columns and column order have been selected, the following screen is displayed.



The screenshot shows a window titled "Call Reports" with a "Reports Wizard" sidebar on the left. The main area is titled "Specify the Reporting Period and Interval". It contains two sections: "Reporting Period" and "Reporting Interval".

Reporting Period:

- Start Date: 12/10/2014
- End Date: 12/10/2014

Reporting Interval:

- Start Time: 12:00 AM
- End Time: Midnight

At the bottom right, there are two buttons: "Generate Report" and "Cancel".

Figure 6-30 Call Reports - Specify Reporting Period

This menu allows the user to specify the date(s) that are included in this report. The user can enter a specific start and end date or click on the date field to use an interactive calendar control to select the dates. The report generator uses all data available during the specified dates (inclusive).

The time interval menu allows the user to specify the time range that is included in the call history. All calls that have an arrival time during the specified time period are included. For the Start Time field and End Time field, the user can use up/down control to vary each element of the time field (hour, minutes, AM/PM).

Click Generate Report to build the requested report and display the results in the report viewer window.

2.4.2 Abandoned Call Report

This report analyzes abandoned call rates for the queues.

The following table shows an example of the Abandoned Calls report.

Group	Calls Offered	Calls Abandoned	%Abandoned	Avg Aban. Time	%Abandon AT
Q1	4	1	25%	0:09	0%
Que 2	1	0	0%	0:00	0%

Figure 6-31 Abandoned Calls Report

This report does not have a graphing option.

Defining an Abandoned Calls report is accomplished using the following sequence of menus.

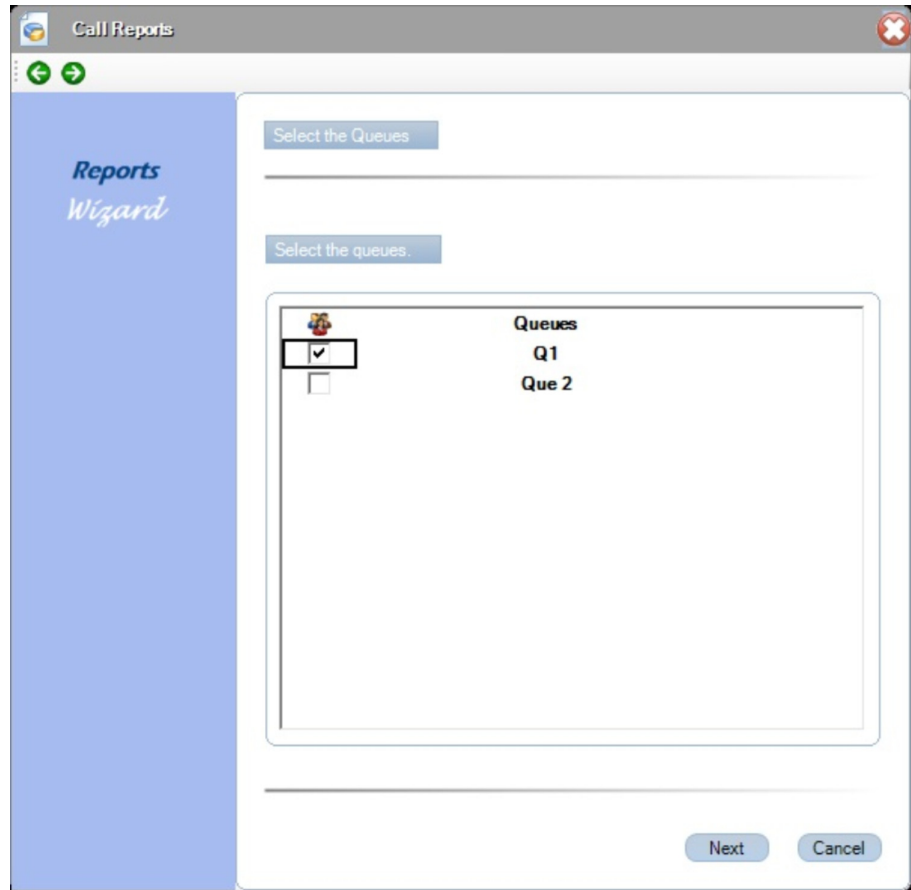
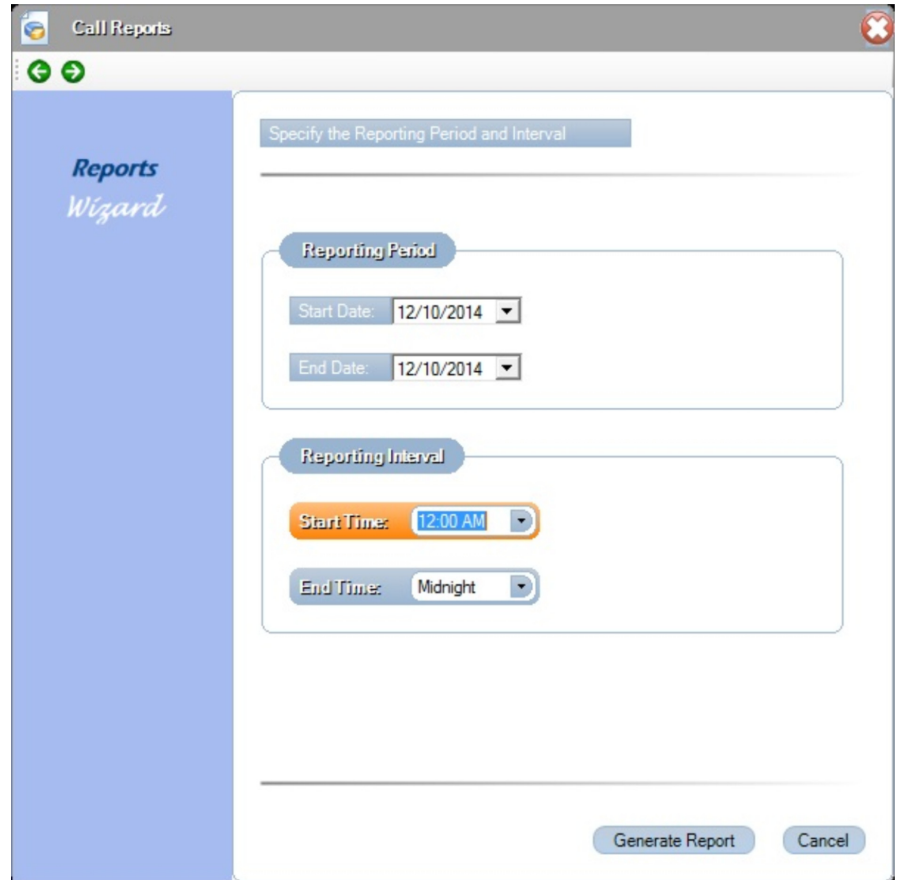


Figure 6-32 Call Reports - Select Queues

This menu allows the user to select the queues that are included in this report. All calls that arrive at a selected queue during the reporting period are included.

After the queues are selected, the following screen is displayed.



The screenshot shows a web application window titled "Call Reports". On the left is a blue sidebar with the text "Reports Wizard". The main content area is titled "Specify the Reporting Period and Interval". It contains two sections: "Reporting Period" and "Reporting Interval".

Reporting Period:

- Start Date: 12/10/2014
- End Date: 12/10/2014

Reporting Interval:

- Start Time: 12:00 AM
- End Time: Midnight

At the bottom right, there are two buttons: "Generate Report" and "Cancel".

Figure 6-33 Call Reports - Specify Reporting Period

This menu allows the user to specify the date(s) that are included in this report. The user can enter a specific start and end date or click on the date field to use an interactive calendar control to select the dates. The report generator uses all data available during the specified dates (inclusive).

The time interval menu allows the user to specify the time range included in the call history. All calls that have an arrival time during the specified time are included. For the Start Time field and End Time field, the user can use the up/down control to vary each element of the time field (hour, minutes, AM/PM).

After the user selects the time interval, the following menu is displayed.

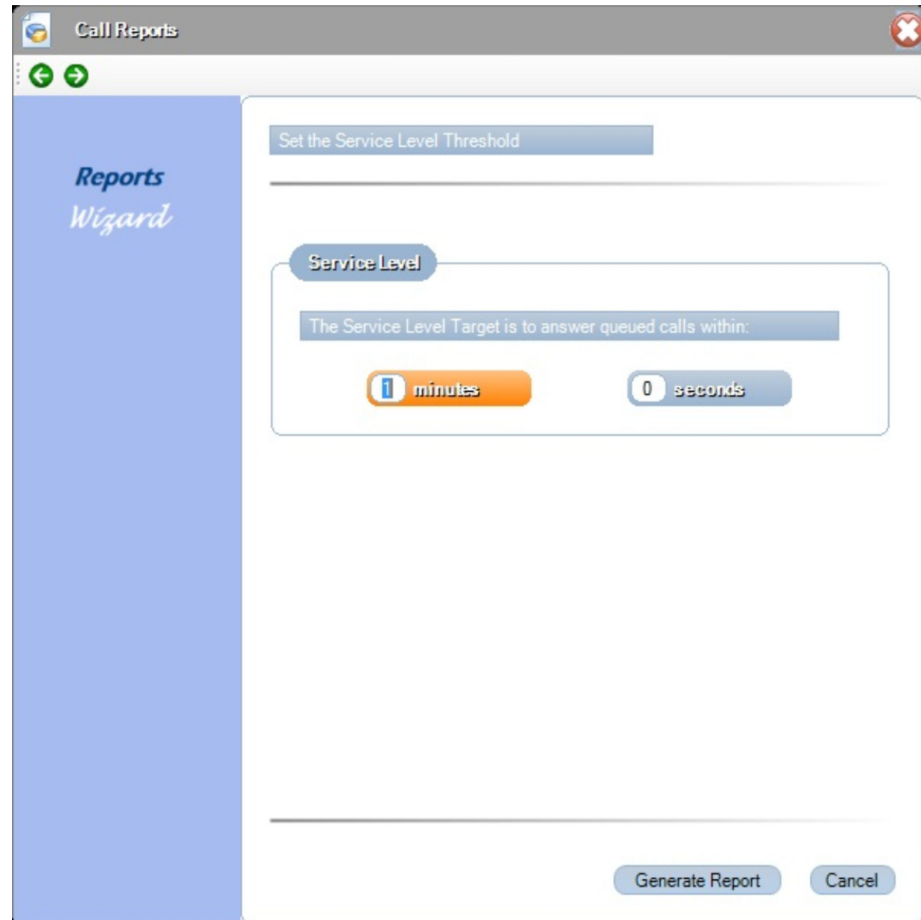


Figure 6-34 Call Reports - Set Service Level Threshold

This menu allows the user to specify the service level target to use when generating this report. This value is used in calculating the percentage of calls that were abandoned after the threshold (Service Level).

Click Generate Report to build the requested report and display the results in the report viewer window.

2.4.3 Abandoned Calls (Hourly)

This report analyzes abandoned call rates as they vary during a workday.

The following image shows an example of the Abandoned Calls (Hourly) format.

Abandoned Calls (Hourly)
12/10/2014 - 12/10/2014
8:00 AM - 5:00 PM
Service Level Target is 1 minute

8 AM 01	9 AM 01	10 AM 01	11 AM 01	12 PM 01	1 PM 01	2 PM 01	3 PM 01	4 PM 01	5 PM 01	8 AM 02	9 AM 02	10 AM 02	11 AM 02	12 PM 02	1 PM 02	2 PM 02	3 PM 02	4 PM 02	5 PM 02	
0	4	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0
0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
0:00	0:09	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Figure 6-35 Abandoned Calls Report (Hourly)

The graphing option for this report shows the Calls Offered, Calls Abandoned, Average Abandoned Time, Percent Abandoned and Percent Abandoned After Threshold values across an hourly horizontal axis.

Defining the Abandoned Calls (Hourly) report is accomplished using the following sequence of menus.

Select the Queues – Same menu described in Calls Abandoned example.

Specify the Columns/Fields – Same menu described in Calls Abandoned example.

Specify the Column Order – Same menu described in Calls Abandoned example.

Specify the reporting period – Same menu described in the Abandoned Calls example.

Set the Time Interval – Same menu described in the Abandoned Calls example.

Set the Service Level Threshold – Same menu described in the Abandoned Calls example, except the Generate Report button is replaced with the Next button.

Select the report format – The following menu allows the user to select the format for the report.

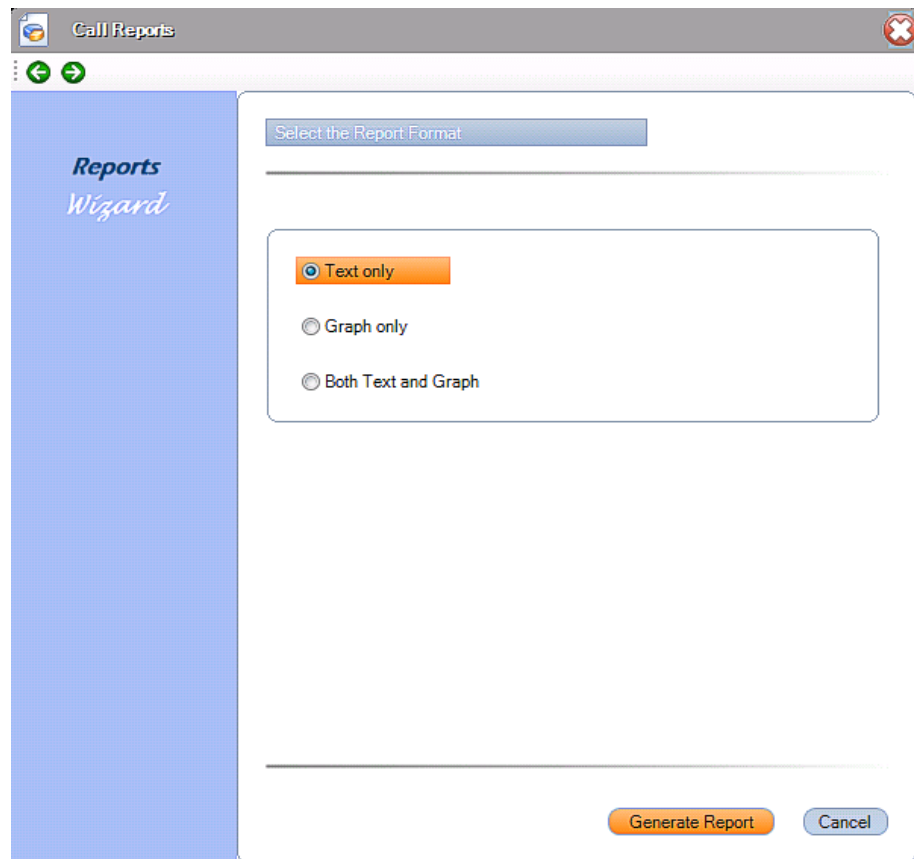


Figure 6-36 Call Reports - Select Report Format

This menu allows the user to specify if the report presents the data in Text Format, Graph Format or Both Text and Graph Format.

2.5 Auto Reports

When the **Auto Report** option is selected, the Contact Center Reports main window appears as follows:



Figure 6-37 Auto Print Reports Main Menu

From this menu, the following operations are available:

- Modify Auto Print Report
- Delete Auto Print Report

The bottom half of the main window lists the Auto Reports currently defined.

The following sections describe the actions available for Auto Reports.

2.5.1 Defining an Auto Print Report

Each report category (Agents, Queues, Calls) provides the function **Define Auto Report**. This function allows the user to schedule a report to print at regular intervals.

When the user requests to create an auto report for a particular report type, the following series of menus is displayed.

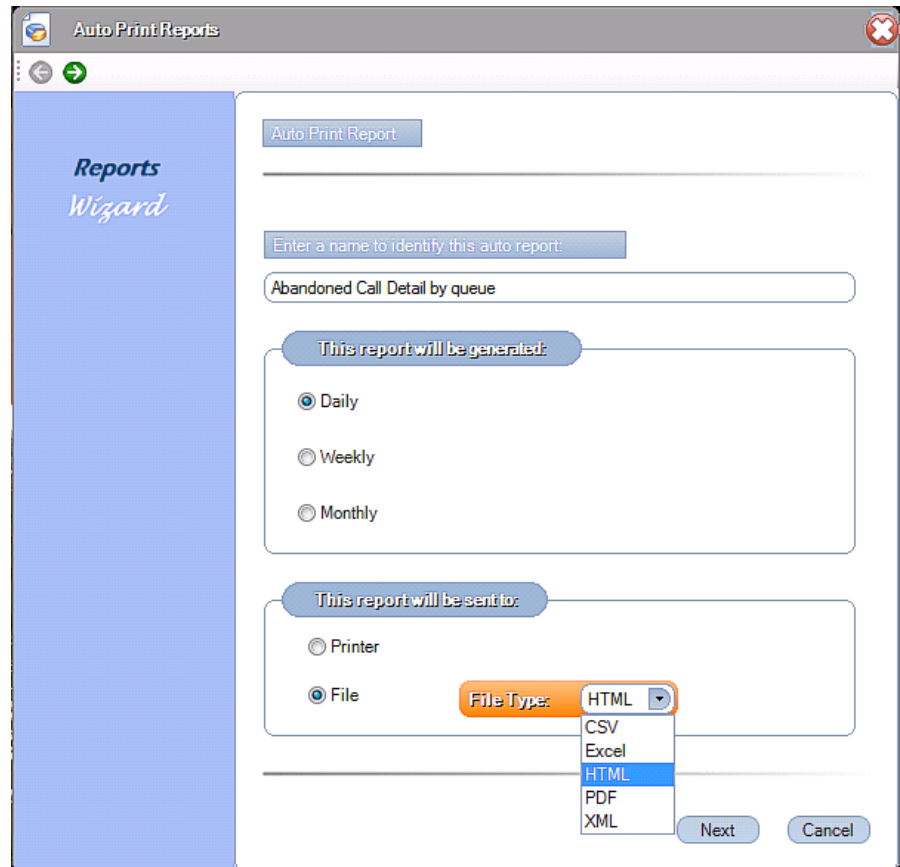


Figure 6-38 Reports Wizard - Auto Report Name

This menu allows the user to specify a name for the auto report that helps to identify the report in the application. The user also specifies if this report is generated daily, weekly, or monthly, and if the report will be sent to a printer or a file. If the report is saved to a file the

users defines the file type from CSV, Excel, HTML, PDF, or XML. The destination for Auto Reports saved to a file is defined under the **Tools>Set Defaults>Auto Report Folder**.

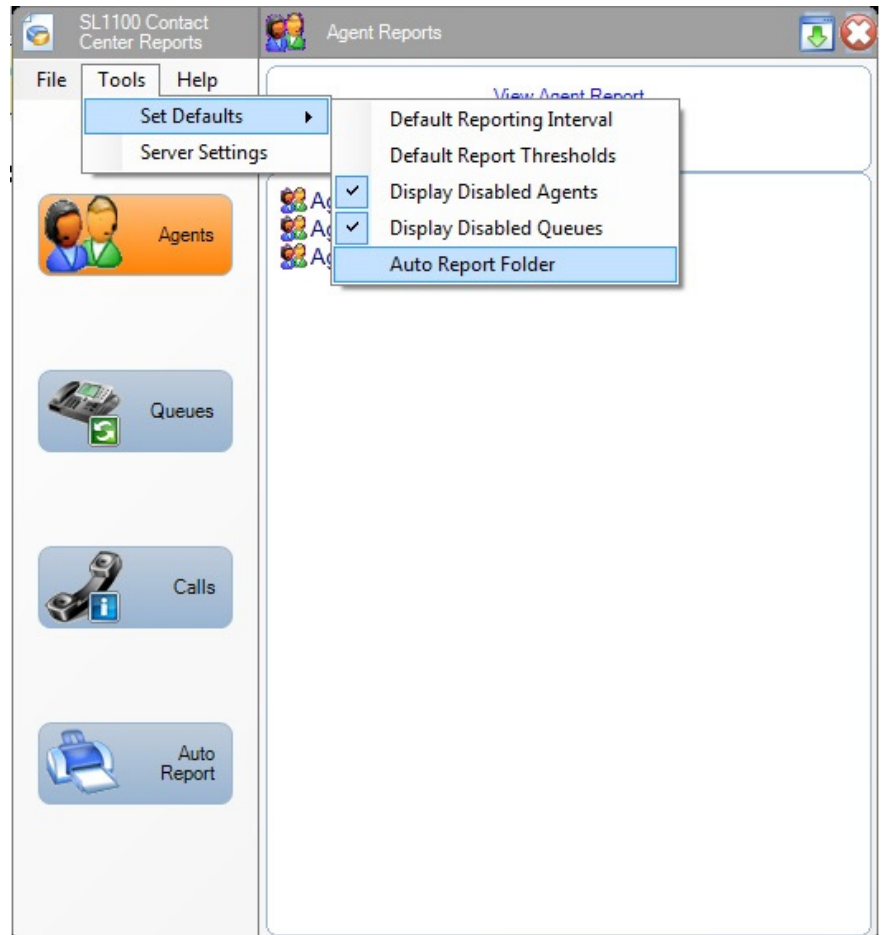
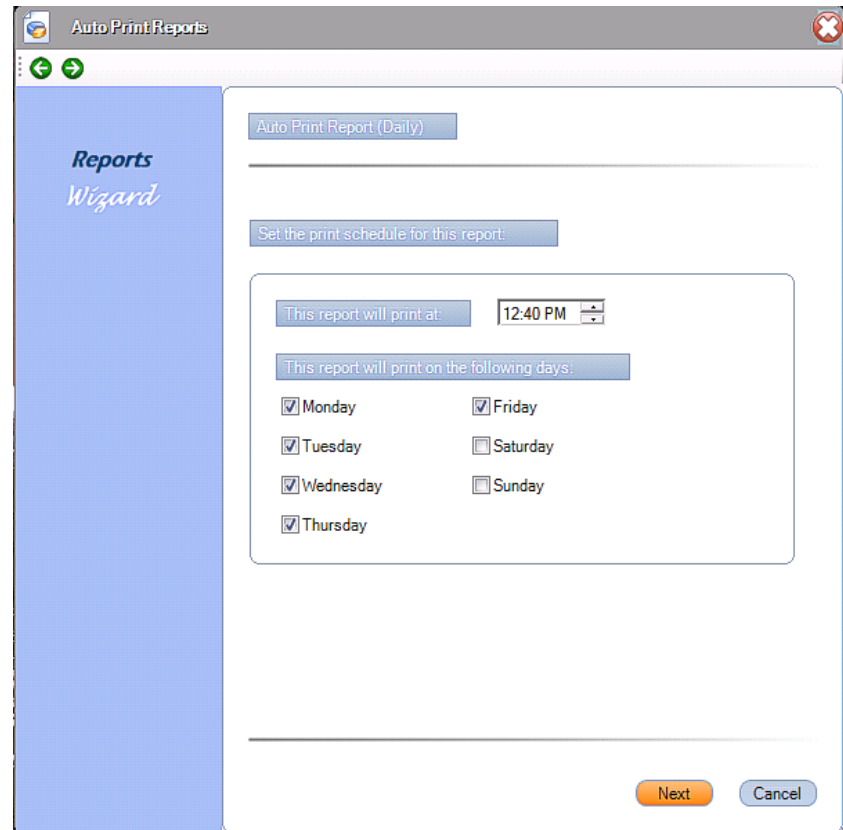


Figure 6-39 Reports Wizard - Auto Report Folder Menu

Each scheduling option is further defined in the following sections.

2.5.2 Define a Daily Report

After the user selects the Daily option on the Auto Report menu, the following form is displayed.



The screenshot shows a window titled "Auto Print Reports" with a "Reports Wizard" sidebar. The main area is titled "Auto Print Report (Daily)" and contains the following elements:

- A header bar: "Auto Print Report (Daily)"
- A sub-header: "Set the print schedule for this report:"
- A time selection field: "This report will print at:" with a dropdown menu showing "12:40 PM".
- A days selection field: "This report will print on the following days:" with a list of days and checkboxes:
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday
- Navigation buttons: "Next" (orange) and "Cancel" (blue).

Figure 6-40 Reports Wizard - Auto Report (Daily)

This menu prompts the user to specify the time of day that this report is printed. In the time field, the user can use the up/down arrow keys to set the value for each component of the time (hour, minutes, AM/PM). The user also selects the days of the week that this report is printed.

After the user completes this menu, the wizard then continues with the first menu required to define the requested report, as described in the earlier sections. The wizard continues with the report definition, however, the Reporting Period (Start Date/End Date) menu is not shown. This is because the Auto Print schedule implies the dates to be included in the report. For the daily report, data is included for the last complete reporting interval, prior to the requested print time.

For example, if the Daily report is to be printed at 5:00PM and the reporting interval is 8AM-5PM, the report includes the data for the current day. However, if the scheduled print time falls during the reporting period, the previous day interval is used.

For example if the requested print time is 9:00AM and the reporting interval is 8AM-5PM, the reporting interval is for the previous day.

2.5.3 Defining a Weekly Report

After the user selects the Weekly option on the Auto Report menu, the following form is displayed.

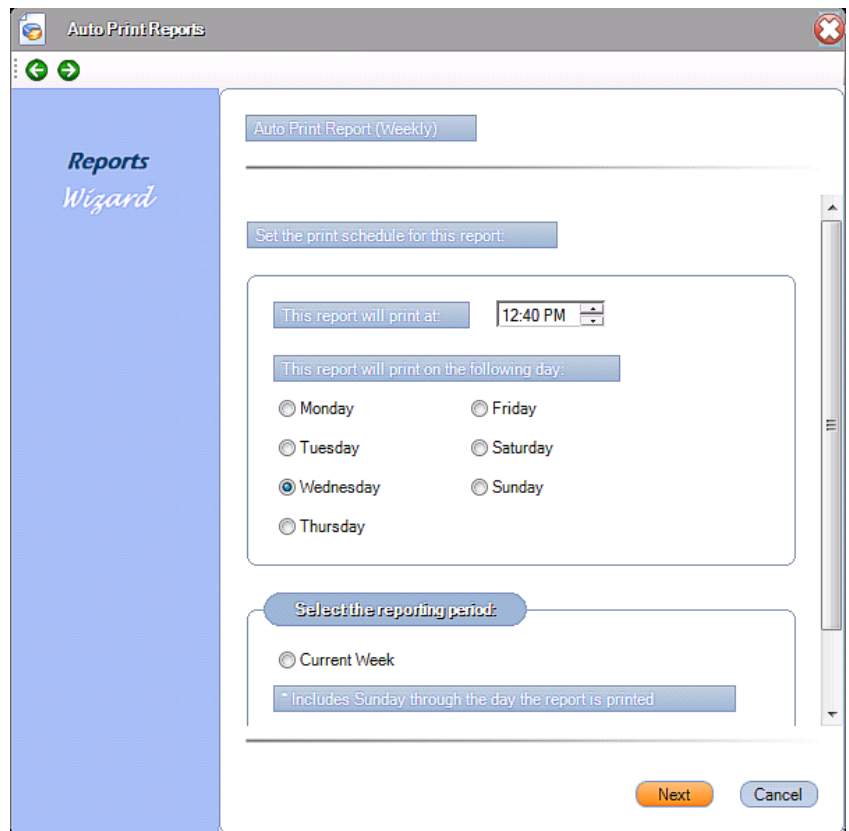


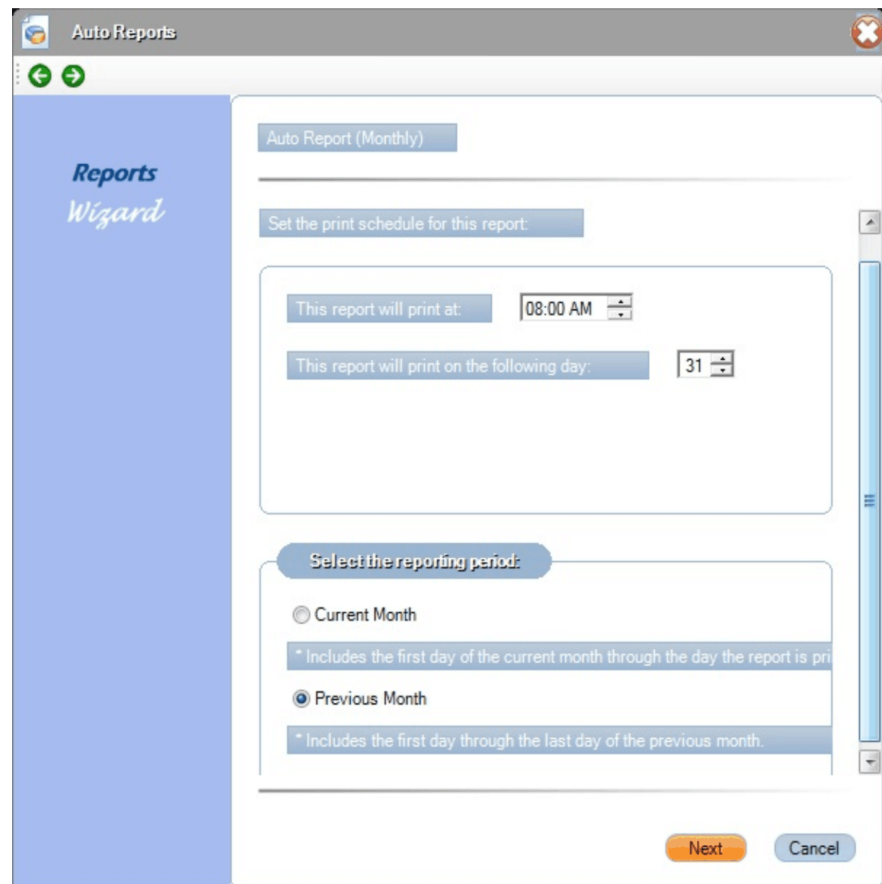
Figure 6-41 Reports Wizard - Auto Report (Weekly)

This menu prompts the user to specify the time of day that this report is printed. In the time field, the user can use the up/down arrow keys to set the value for each component of the time (hour, minutes, AM/PM). The user also selects the day of the week that this report is printed. The user also selects the week to be printed, relative to the print date (current week or previous week).

After the user has completed this menu, the wizard continues with the first menu required to define the requested report, as described in the earlier sections. The wizard continues with the report definition, however, the Reporting Period (Start Date/End Date) menu is not shown. This is because the user already specified the Reporting Period in the above menu.

2.5.4 Defining a Monthly Report

After the user selects the Monthly option on the Auto Report menu, the following form is displayed.



The screenshot shows a window titled "Auto Reports" with a "Reports Wizard" sidebar. The main content area is titled "Auto Report (Monthly)" and contains the following elements:

- A header bar with the text "Auto Report (Monthly)".
- A section titled "Set the print schedule for this report:" containing:
 - A field "This report will print at:" with a dropdown menu showing "08:00 AM".
 - A field "This report will print on the following day:" with a dropdown menu showing "31".
- A section titled "Select the reporting period:" containing:
 - A radio button for "Current Month" with a note: "* Includes the first day of the current month through the day the report is printed".
 - A radio button for "Previous Month" with a note: "* Includes the first day through the last day of the previous month".
- At the bottom right, there are "Next" and "Cancel" buttons.

Figure 6-42 Reports Wizard - Auto Report (Monthly)

This menu prompts the user to specify the time of day that this report is printed. In the time field, the user can use the up/down arrow keys to set the value for each component of the time (hour, minutes, AM/PM). The user also selects the day of the month this report is printed. If the user selects the 31st, the report is printed on the last day of the month, regardless of the number of days in the month. The user also specifies the reporting period that is included, relative to the specified print date (current month or previous month).

After the user completes this menu, the wizard continues with the first menu required to define the requested report, as described in the earlier sections. The wizard continues with the report definition, however the Reporting Period (Start Date/End Date) menu is not shown. This is because the user specified the reporting period as part of the menu shown above.

2.5.5 Execution of an Auto Report

At the scheduled time for an Auto Report, the Contact Center Reports application sends the requested report to the default printer (if Printer is option selected). The default printer is set through the **File** → **Print Setup** command on the main menu. If File was the option selected, the requested report is saved in the Auto Report Folder.

The Contact Center Reports application should be running at the time that an Auto Report is scheduled to run. If the Contact Center Reports is not running, the report does not run at the scheduled time. However, it can run after opening Reports only if it was set to run on that day. Reports set to run on other days will not run.

2.5.6 Modifying an Auto Report

The user can modify a previously defined Auto Report by selecting the **Modify Auto Report** function on the Auto Report main menu. When this function is selected, the Contact Center Reports utility shows the first screen from the Auto Report definition sequence, with the current values populated for each field. The user can then use the Next button or green left (Back)/right (Next) arrows, located on the top left of the screen, to move through the definition and update any field. Finish and Cancel buttons are available on all menus in the definition sequence, so the user does not have to advance to the last menu to complete the update.

2.5.7 Deleting an Auto Report

The Delete Auto Report function allows the user to remove an auto report definition from the system. When the user selects an auto report and selects delete, a confirmation dialog is shown to verify that the user wants to permanently remove the definition.

2.6 Pull-Down Menus

The Function Menu on the Reports main screen accesses commonly used functions for the application. Each function category has an associated drop down menu that lists all available functions in that category. The available categories and functions are as follows:

File

- Print Setup
- Exit

Tools

- Set Defaults
 - Default Report Interval
 - Default Report Thresholds
- Contact Center Server Settings
- Display Disabled Agents
- Display Disabled Queues
- Auto Report Folder

Help

- Contents and Index
- About Contact Center Reports

These functions are further defined in the following sections.

File Menu

- Print Setup

This function allows the user to define the default printer that is used for printing reports, including Auto Reports. When this function is selected, the following dialog is displayed.

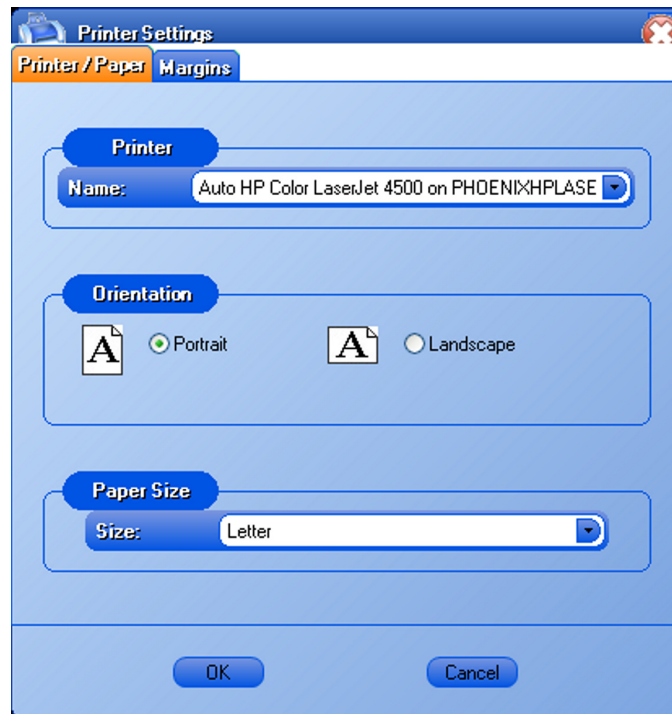


Figure 6-43 Printer Settings

This form allows the user to select the default printer and set the paper size, and orientation. Press the Margins tab to set the paper margins and alignment for the report.

- Exit

This function closes the Reports application, including all open report viewer windows. When this function is selected, a confirmation dialog is opened that informs the user that Auto Print reports are not executed if the application is not running at the time the report is scheduled to be printed. This window also has a checkbox control that disables the display of this message in the future.

Tools Menu

- Set Defaults

This function allows the user to set default values for many of the fields used in the report definition Wizards. This function is useful for supervisors that generate reports that consistently have the same settings, such as queue set, reporting interval, etc.

When this function is highlighted the following submenu options are displayed:

- Default Report Interval
- Default Report Thresholds
- Display Disabled Agents
- Display Disabled Queues
- Auto Report Folder

Each function is further defined in the following sections.

○ Default Report Interval

This function allows the user to set a default reporting interval that pre-sets in the Report wizards each time a new report is generated. When this function is selected, the following menu is displayed.

The screenshot shows a software window titled "AgentReports" with a standard Windows-style title bar. On the left side, there is a blue sidebar with the text "Reports Wizard" and two green navigation arrows (back and forward). The main content area is white and contains a section titled "Specify the Reporting Interval" in a light blue box. Below this, there is a rounded rectangle labeled "Reporting Interval" which contains two time selection controls: "Start Time: 7:00 AM" and "End Time: 5:00 PM", both with dropdown arrows. At the bottom right of the window, there are two buttons: "Next" and "Cancel".

Figure 6-44 Set Default Reporting Interval

- Default Report Thresholds

This function allows the user to set default values for Short Call and Service Level thresholds that pre-set in the Report wizard each time a new report is generated. When this function is selected, the following menu is displayed.

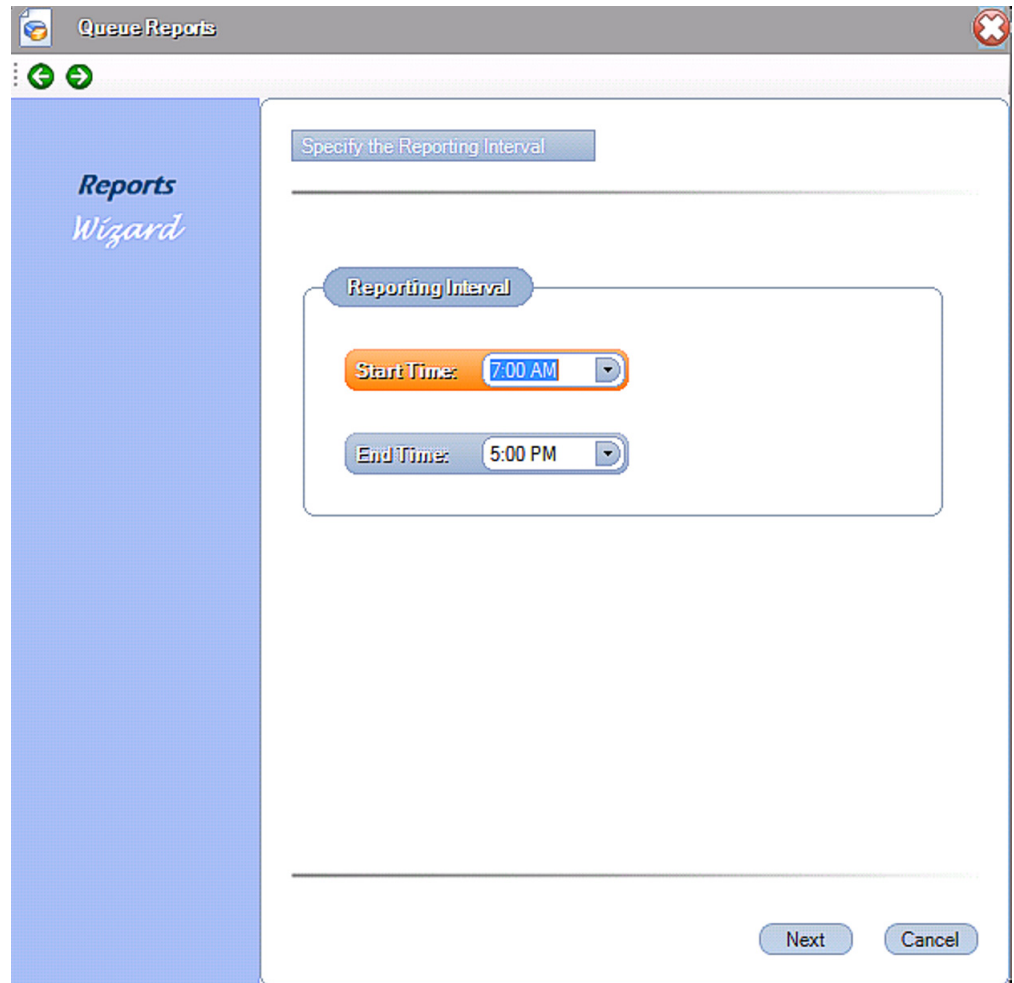


Figure 6-45 Set Default Report Interval

- Display Disabled Agents

This is checked at default to display disabled agents in reports. Uncheck this option if these agents are not to be displayed in reports.

- Display Disabled Queues

This is checked at default to display disabled queues in reports. Uncheck this option if these queues are not to be displayed in reports.

- Auto Report Folder

This function defines the location that Auto Reports saved to a file are stored. When this function is selected, the following window is displayed. Choose the folder and select OK.

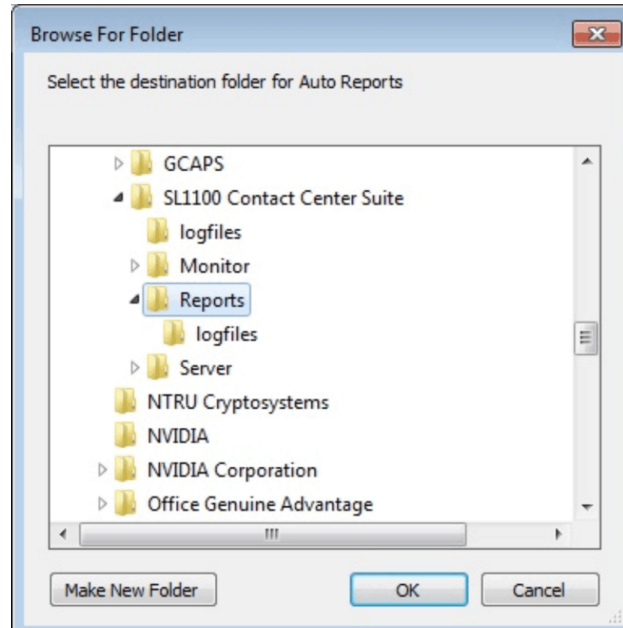


Figure 6-46 Auto Print Report Folder

- Contact Center Server Setup

This function changes the settings for the Contact Center Server.

Help Menu

- Contents and Index

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

- About Contact Center Reports

The About function displays a form that shows the product name, current version number, and copyright notice.

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