



Cisco Unified Workforce Optimization

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Getting Started Guide

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Getting Started

This document describes how to log in to Unified Workforce Optimization and provides a brief description of the Unified Workforce Optimization interface.

Cisco Unified Workforce Optimization supports the following products:

- Call Recording and Quality Management
- Workforce Management (WFM)

The information provided in this document is common to each of these products, except where noted.

Each product has its own *Application User Guide*. Consult the user guide for the products you use for detailed information on how to use them.

Accessing Unified Workforce Optimization

Unified Workforce Optimization is a web application. Access it by entering the following URL in your browser:

`https://<base server> or`

`http://<base server>`

where `<base server>` is the host name or IP address of the server that hosts the Unified Workforce Optimization Container.

Validating Your PC

Before you log in to Unified Workforce Optimization for the first time, validate your PC. Validating your PC means that Unified Workforce Optimization checks it to make sure that it has all the features required to run your Unified Workforce Optimization products.

To validate your PC, access the Unified Workforce Optimization login page and click the Validate my PC configuration link. Unified Workforce Optimization performs the evaluation and then displays the Diagnostics page, which lists the required features for each Unified

Workforce Optimization product in your system. The Results column tells you if your PC is configured correctly or not for that feature.

Diagnostics				
Product	Feature	Supported	Found	Result
QM	Browser Type and Version	Microsoft Internet Explorer 8,9	Microsoft Internet Explorer 9 (32-bit)	✔ Good
QM	Platform	Microsoft Windows	Microsoft Windows	✔ Good
QM	Popup blocker enabled	False	False	✔ Good
QM	Proxy Viewer ActiveX Enabled and Component Installed	True (Proxy.Viewer)	True (True)	✔ Good
QM	Windows Media Player ActiveX Enabled and Component Installed	True (WMPPlayer.OCX)	True (True)	✔ Good
QM	RDP Viewer ActiveX Enabled and Component Installed	True (Rdpvcomapi.RDPViewer.1)	True (False)	✘ Bad
WFM	Browser Type and Version	Microsoft Internet Explorer 8,9	Microsoft Internet Explorer 9 (32-bit)	✔ Good
WFM	Popup blocker enabled	False	False	✔ Good
CAS	Browser Type and Version	Microsoft Internet Explorer 8,9	Microsoft Internet Explorer 9 (32-bit)	✔ Good
CAS	Platform	Microsoft Windows	Microsoft Windows	✔ Good
CAS	Popup blocker enabled	False	False	✔ Good
CAS	Proxy Viewer ActiveX Enabled and Component Installed	True (Proxy.Viewer)	True (True)	✔ Good
CAS	Windows Media Player ActiveX Enabled and Component Installed	True (WMPPlayer.OCX)	True (True)	✔ Good

Calabrio ONE Component Versions	
Component	Version
User Interface	4.0.299.0
Calabrio Quality Management	9.2.1.549
Workforce Management	9.2.1.347
Calabrio Analytics Services	9.2.dev build 2013-12-09 16:01:51

Note that Screen Playback ActiveX installed/enabled is associated with the Cisco Screen Player plug-in.

If the Diagnostics page shows Bad for any feature, you must correct that before you can log in to Unified Workforce Optimization. In some cases you will see links at the bottom of the page that will help you correct a problem. In other cases you will have to contact your supervisor or administrator for assistance.

The Component Versions section of the page displays the current versions of Unified Workforce Optimization and each installed product.

Note: If you have a Bad result for RDP Viewer ActiveX Enabled and Component Installed, see [Enabling ActiveX Controls in Internet Explorer](#) for instructions

Adding a Trusted Site to Internet Explorer

Before you log in to Unified Workforce Optimization for the first time, it is recommended that you add the Unified Workforce Optimization URL as a trusted website to Internet Explorer. By adding a website to the Trusted security zone, you can control the level of security used on that site.

1. Start Internet Explorer and select Tools > Internet Options from the toolbar.
2. On the Security tab, clear the Enable Protected Mode check box.
3. Select Trusted Sites, and then click Sites.
4. In the Add this website to the zone field, enter the base server URL (https://<base server>) and click Add. The URL is added to the Websites list.

Note: The following message might appear:

"Sites added to this zone must use the https:// prefix. This prefix assures a secure connection."

If you see this message, clear the Require Server Verification (https:) for all sites in this zone check box and click Add again. Then select the Require Server Verification (https:) for all sites in this zone check box.

6. Click Close to dismiss the Trusted Sites dialog box.

Enabling ActiveX Controls in Internet Explorer

1. Start Internet Explorer and select Tools > Internet Options from the toolbar.
2. On the Security tab, choose one of the following options:
 - Select Local Internet and change Security level for this zone to Medium-low.
 - Select Internet or Trusted Sites, and then click Custom Level. Scroll down to ActiveX Controls and Plug-ins and change the option as follows:

Option	Setting
Automatic prompting for ActiveX controls	Enable

Then OK to dismiss the Security Settings - Trusted Sites Zone dialog box.

3. Click Apply and then OK to dismiss Internet Options.
4. Restart Internet Explorer.

Logging In

The Unified Workforce Optimization login page allows you to log in to a single product or to multiple products simultaneously.

The following table describes the fields on the Login page.

Field	Description
Separate Product Logins check box	This check box is present only in systems with multiple Unified Workforce Optimization products. By default it is clear, so that when you log in, you log in to every product simultaneously. If you select the check box, you can log in to a specific product in your system.
Product name check box	This check box is present only in systems with multiple Unified Workforce Optimization products. If you opt for separate product login, after you select the desired product you must select this check box. If you do not select it, the Username and Password fields are not enabled.
Username	<p>Your Unified Workforce Optimization username. If your system uses Active Directory, this is your Active Directory username. If your system does not use Active Directory, it is the username assigned to you by your administrator.</p> <div style="background-color: #d9ead3; padding: 10px; border: 1px solid #bdc3c7; border-radius: 5px;"> <p>Note: If not using AD, and your administrator wants to take advantage of multiple login, your username and password must be the same in every product.</p> </div>
Password	Your Unified Workforce Optimization password. If your system uses Active Directory, this is your Active Directory password. If your system does not use Active Directory, it is the password assigned to you by your administrator.
Domain	The Active Directory domain. This field is displayed only on systems that use Active Directory. Select the domain associated with your AD username and password.

Field	Description
Language	Choose the language used in the Unified Workforce Optimization interface. The language you choose is used in all products, and persists from session to session for your user-name.
Product icons	These icons are displayed only in multiple product systems and if you have opted for separate product logins. When you click an icon, the name of the product appears above the Username field. Use these icons to select the product you want to log in to.
Validate my PC configuration	Click this link to make sure your PC is configured correctly to use Unified Workforce Optimization. See Validating Your PC for more information.

Logging in to One Product

To log in to one product:

1. Select the Separate product logins check box.
2. Click the product icon for the product you want to log in to.
3. Select the product name check box.
4. Complete the fields on the Login page.
5. Click Login.

Note: If there is only one product in your system, the Login page is simpler, and shows only the Username, Password, Domain (if you use Active Directory), and Language fields.

There is no limit to the number of login attempts you can make. An error message appears if your credentials are not correct.

Logging in to Multiple Products

To log in to multiple products:

1. Clear the Separate product logins check box (this is clear by default).
2. Complete the fields on the Login page and click Login.

If your credentials are the same across the product suite, your login give you access to all those products (based on your role).

However, if your credentials are not the same for one or more of the products in the product suite, you are not notified of the error. You will be able to access only the products for which your credentials were valid.

To find out which products you could not access, log out and use the separate login option. Log in to each product in turn to find out which one is rejecting your credentials.

Access Based on Role

This section describes which applications are available to a user based on their assigned role.

Call Recording and Quality Management

For Call Recording and Quality Management, the following table shows the features available by role and Quality Management license.

The types of licenses available are:

- Compliance Recording (CR)
- Compliance Recording Application (CRA)
- Quality Management (QM)
- Quality Management Application (QMA)
- Advanced Quality Management (AQM)
- Advanced Quality Management Application (AQMA)

Licenses are assigned in Quality Management Administrator, in the Personnel > License and Unlicense Users dialog box.

Access based on license and role

Role	Dashboard	Recording		Live Monitoring	Recording Monitoring	Reporting
		Evaluate and Review	Search and Play			
Archive User			CR CRA		CR CRA	CR CRA
Manager			CR CRA	CR CRA	CR CRA	CR CRA
Supervisor			CR CRA	CR CRA	CR CRA	CR CRA
Agent			CR CRA			
Knowledge Worker			CR CRA			
Archive User	QM QMA AQM AQMA		QM QMA AQM AQMA			QM QMA AQM AQMA
Evaluator	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA			
Manager	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA		QM QMA AQM AQMA
Supervisor	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA		QM QMA AQM AQMA

Role	Dashboard	Recording		Live Monitoring	Recording Monitoring	Reporting
		Evaluate and Review	Search and Play			
Agent	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA			QM QMA AQM AQMA
Knowledge Worker	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA			QM QMA AQM AQMA

If you want to enable Live Monitoring for an evaluator or archive user, assign the manager role to the users.

Agents and knowledge workers can run reports on themselves and review their own evaluations. They do not have access to reports or evaluations for other users.

Applications by Role

The following table shows the applications available by role in Call Recording and Quality Management.

Note: Permissions are configured per evaluation form.

Application access based on role

Applications	Roles					
	Agent/ KW	Super	Mgr	Eval	Arch User	Admin
Voice Recording	X					
Screen Recording	X					
Dashboard	X	X	X	X	X	X

Application access based on role

Applications		Roles					
		Agent/ KW	Super	Mgr	Eval	Arch User	Admin
Recording	Play	X	X	X	X	X	
	View Evaluation	X	X	X	X	X	
	Evaluate		X	X	X		
Live Monitoring			X	X			
Recording Monitoring		X	X	X			
Reporting	Run Report	X	X	X	X	X	
	Schedule Report		X	X	X	X	

Note: Screen Recording, View Evaluation, Evaluate, and Live Monitoring require one of the following licenses: QM, QMA, AQM, or AQMA.

Note: If you want to enable Live Monitoring for an evaluator or archive user, assign to them the manager role.

Scoping Rules

In Call Recording and Quality Management, your role not only controls what information is available to you, but also the scope of that information. In this case, “scope” refers to the contacts you can view and/or evaluate.

Scoping Rules and HR/Training Recordings

The scoping rules described in this section do not apply to contacts marked as Training recordings, which can be reviewed by all roles. The scoping rules do apply to all other recordings, including those marked as HR recordings.

Administrator ID

The administrator ID can configure contents of the Dashboard view by role. The administrator can also lock down a dashboard.

Agents and Knowledge Workers

Agents and knowledge workers can view only training contacts and their own evaluated contacts. Agents can also see their own archive recordings if enabled by the administrator.

Supervisors

Supervisors can view contacts (including training and HR contacts) made only by their currently active teams. For example, if a supervisor had been assigned to Team A last week, but is now assigned to Team B, that supervisor can view only contacts recorded by currently active agents on Team B. This includes contacts recorded by the Team B agents before the supervisor was assigned to Team B.

Managers

Managers can view contacts (including training and HR contacts) made only by their currently active groups. For example, if a manager had been assigned to Group A last week, but is now assigned to Group B, that manager can view only contacts recorded by currently active agents on currently active teams in Group B. This includes contacts recorded by the Group B agents before the manager was assigned to Group B.

Evaluators

Evaluators can view contacts (including training and HR contacts) for all currently active groups, teams, and agents. Evaluators cannot see any contacts made by deactivated groups, teams, and agents.

Archive Users

Archive users can view all archived call contacts made by all active and inactive groups, teams, and agents.

Active Role Access

Active groups and teams are currently in use. Inactive groups and teams are no longer used, but still have history that needs to be taken into account for such things as historical reporting.

With the exception of archive user, Unified Workforce Optimization is only concerned with active groups, teams, and agents.

Workforce Management

The following table shows the features available by role for WFM.

Note: The scope of a user's role limits the number of features available within an application. For example, while all roles can access reports, agents can view only one report while administrators can view all available reports.

Application	Administrator	Scheduler	Supervisor	Agent
Agent Schedules	X	X	X	
Application Management	X	X		
Dashboard	X	X	X	X
Messaging	X	X	X	X
My Schedule	X	X	X	X
Planning	X	X		
Reporting	X	X	X	X

About the Administrator Role

WFM comes with a system administrator user ID. The password for this user ID (administrator) is initially set during installation in the WFM Configuration Setup utility, and maintained in WFM (via the Users page for the administrator user).

You cannot assign the administrator role to any other user in WFM. "Administrator" is not an option in the list of roles available when configuring users.

However, it is possible to have multiple WFM administrators.

- In systems that use Active Directory to administer user IDs and passwords, you can configure Active Directory users to be WFM administrators by assigning them to a specific user group within Active Directory. The name of this group is entered in the WFM Configuration Setup utility (WFM Authentication step) when adding the connection information for Active Directory. WFM treats any users who are members of this group as WFM administrators.
- In systems that do not use Active Directory, the only way to have multiple administrators is to allow people to share the administrator user ID and password.

Running Unified Workforce Optimization in Multiple Browser Tabs

You can run Unified Workforce Optimization applications in separate browser tabs or separate instances of Internet Explorer during the same session. For example, you can run the Reports application in one tab and the Application Management application in another.

Logging in or out from any browser tab or browser instance affects your login status in all browser tabs and browser instances. For example, if you log in as User 1 in one tab, you are logged in as User 1 in every other tab or browser instance you open. If you log out as User 1 and then log in as User 2 from any tab or instance, all tabs and instances will be logged in as User 2 after they are refreshed.

To run applications in separate browser tabs, follow these steps:

1. Log in to Unified Workforce Optimization.
2. Copy the URL.
3. Open a new browser tab or instance and paste the URL in the address field.
4. Navigate to the application you want to display in that tab or instance.
5. Repeat steps 3 and 4 as many times as desired.

Clearing Your Cache

If Unified Workforce Optimization does not display pages properly (for example, a page is blank), it is recommended that you log out and clear the Internet Explorer cache.

To clear the Internet Explorer cache, follow these steps:

1. In Internet Explorer, choose Tools > Internet Options.
2. On the General tab, click Delete in the Browsing History section and then click OK.
3. Restart Internet Explorer.

Best practices: It is recommended that you configure Internet Explorer to clear the cache every time you exit. To do this, choose Tools > Internet Options. On the General tab In the Browsing History section, select the Delete browsing history on exit check box.

Logging Out

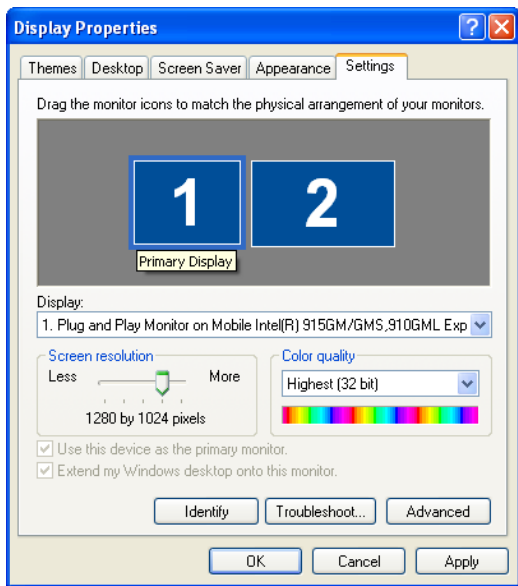
To log out of Unified Workforce Optimization, hover your mouse over your username in the upper right corner of the page, and click Log Out. This returns you to the Login page.

Note: If you are logged into multiple products, logging out from one will log you out from all.

To exit Unified Workforce Optimization completely, close your browser.

Dual Monitor Configuration for Call Recording and Quality Management

When configuring display properties on a machine running Unified Workforce Optimization with dual monitors, additional host monitors must be located below or to the right of the primary display monitor in the Display Properties window. Any monitor located above and/or to the left of the primary display monitor will not be visible (this is a Windows restriction).



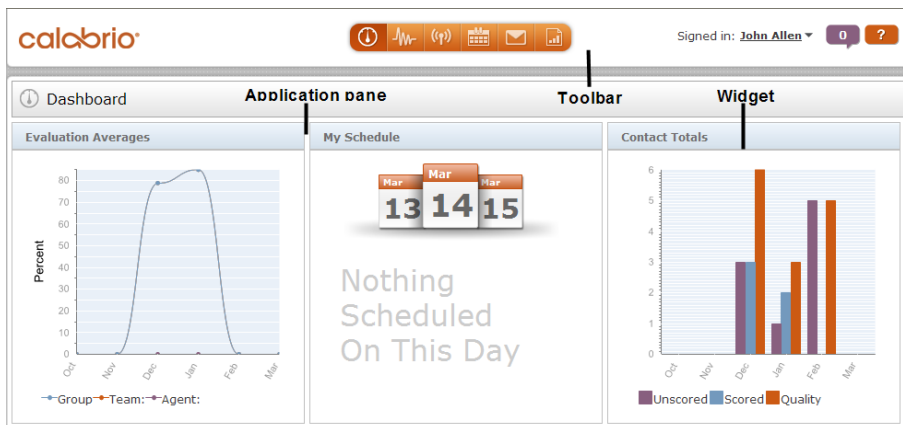
Using a Dual Monitor Configuration

- To view a popup window on another monitor, click and drag the popup window to the other monitor.

You can now view Unified Workforce Optimization on one monitor and the popup window on the other monitor.

Unified Workforce Optimization Interface

Unified Workforce Optimization is divided into three sections.



Container Bar

This toolbar at the top of the page displays navigation buttons you can use to do the following:






- Access Unified Workforce Optimization's common applications.
- View the name of the user who is currently signed in to Unified Workforce Optimization and log out.
- View the number of new alerts and display a list of alerts. The Alerts button also displays the number of new messages available. When you click one of the alerts in the list, an Alert Notification dialog box displays more information.
- View alerts, which occur when a significant event occurs. For more information on alerts, see the *Application User Guide*.
- Access the online help.







Application Pane	The center section of the page that displays a selected application.
Widgets	Self-contained applications that can be configured for a specific purpose.

Toolbar

The following table describes the buttons that appear in the toolbar at the top of the screen.

Toolbar

Button	Icon	Description
Dashboard		Provides information based on the products installed with Unified Workforce Optimization. Administrators can log in to Unified Workforce Optimization and lock down the Dashboard by role.
Recordings		Allows you to do the following: <ul style="list-style-type: none"> Search the stored archives for specific customer conversations. Review a list of contacts and from this list access the associated recordings and evaluations.
Live Monitoring		Allows supervisors and managers to monitor the audio for active calls for users in their scope.
Recording Monitoring		Allows you to monitor the recording status of active calls within your scope.
Agent Schedules		Allows administrators, supervisors, and schedulers to manage schedules for selected agents by updating the production schedule.

Button	Icon	Description
My Schedule		Allows agents to display their schedules by day, week, or month with a detail, summary, or list view.
Messaging		Allows agents to make requests, and for administrators, supervisors, and schedulers to manage requests.
Application Management		Allows administrators and schedulers to manage services, people, schedulers, activities, historical data, system configuration, vacation planning (advanced bundle), and strategic planning (advanced bundle)
Reporting		Allows you to generate evaluation reports and system reports Allows you to generate statistics report.
Signed In	NA	Displays the name of the current user and allows you to log out of Unified Workforce Optimization.
Alerts		Displays a list of alerts. For more information, see the <i>Application User Guide</i> .
Help		Displays the help by product.

Application Pane


The application pane displays the application you select from the toolbar. See [Toolbar](#) for more information on available applications.


The applications available to you depend on your role and software license.

Applications

All applications available in Unified Workforce Optimization have the same basic layout.

The following table lists the application buttons.

Icon	Name	Description
NA	Apply	Saves your changes.
NA	Cancel	Exit without saving changes.
	Settings	Displays the configurable settings for this application. Click the icon again to hide the settings.

An Error icon  appears next to a field when you enter the wrong information.

Tables

The interface often displays information in tables. These tables can be modified to your preferences.

Sorting Tables

Data that is presented in tabular form can be sorted based on the contents of a single column in the table. The sort can be ascending or descending.

When you click a column header, a small triangle at the right of the primary sort column heading displays the direction of the sort, ascending or descending.

Consider the following limitations when sorting tables:

- You cannot sort encrypted metadata in the Recordings application.
- You cannot sort data in the Live Monitoring application.

Managing Tables

- To sort a table by one column, click the column heading. Click again to reverse the sort order.
- To move a column, click the column header, then click in the column and drag the column to the location you want it to appear.
- To change the size of a column, drag the column edge to the required width.
- If the table is long, use the scroll bar at the right of the table to move up and down the

table.

- If the table is wide, use the scroll bar at the bottom of the table to move left and right.

Moving Items between Lists

The following Call Recording and Quality Management applications allow you to move items between lists:

- Dashboard
- Reporting

To move an item between lists, click and drag the item from one list to another or one position to another. To move more than one item, use Shift+Click to select contiguous items and Ctr+Click to select non-contiguous items.

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