Customer Journey Platform Management Portal User Guide

Notification

The Broadsoft CC-One solution is now the Cisco Customer Journey Platform. From August 2020, you will see the Cisco name and company logo, along with the new product name on the software, documentation and packaging. During the transition, you may see both Broadsoft and Cisco brands and former product names.

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Contents

About This Guide

This guide explains how to use the features of the CJP Management Portal to control and monitor how calls are distributed across your enterprise, silently monitor calls directed to any site, and view real-time contact center statistics, key performance measures, and historical reports, as well as how to access and use optional features such as Call Recording and Recording Management.

Who Should Read This Guide

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

How This Guide Is Organized

The chapters in this guide provide the following information:

Chapter 1, "Introduction," provides an overview of the CJP service.

Chapter 2, "Getting Started," explains how to sign in to the CJP Management Portal, access the CJP components, perform basic operations, and get help while you work. The chapter also explains how to use the features available in the Account Unlock, Password Reset, Audit Trail, Usage Metrics Report, Web Callback Request Report, and Release Notes modules.

Chapter 3, "Provisioning CJP Resources," explains how to view the tenant settings provisioned for the enterprise as well as how to view, edit, or create other provisioned resources based on user access privileges, such as CJP user and agent profiles, user accounts, entry points, queues, sites, threshold rules, skills and skill profiles, multimedia profiles, teams, wrap-up and idle codes and work types to associate them with, address books, business metrics, and named variables that can be used in call control scripts. This module also provides access to several provisioned items reports.

Chapter 4, "Contact Routing," provides an overview of Cisco's approach to contact distribution in a multi-sourced network and explains how to create scheduled routing and team capacity strategies and alter them in real time to optimize call delivery, assign call flows, and create routing sequences. It also explains how to create call control scripts and audio files and make them available for use in routing strategies.

Chapter 5, "Real-Time Reports," describes the available real-time data elements and explains how to create and modify custom real-time reports, download real-time data to a data-analysis tool, and customize the ticker (the scrolling text area at the top of real-time report pages that displays status information). The chapter also describes how authorized users can monitor threshold alerts.

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

Chapter 7, "Call Monitoring," explains how to participate in silent monitoring sessions for selected voice calls, as well as how to provide instructions to the agent being monitored without being heard by the caller, and how to join a call that is being monitored and participate in the conversation.

Chapter 8, "Call Recording," explains how to use the features of the optional Call Recording module to record any active call that is managed by the CJP service.

Chapter 9, "Recording Management," explains how to use the features of the optional CJP Recording Management module to search for and play audio files recorded through the CJP Call Recording feature and how authorized users can create tags that can be assigned to audio files for use as search criteria, create custom attributes, and view the security key schedule and pruning strategy.

Chapter 10, "Multimedia Provisioning," explains how to view and provision resources used for email and chat.

Chapter 11, "Multimedia Agent Desktop," explains how to monitor email and chat queue and agent activity, approve email responses, reallocate and reject contacts, silently monitor chat conversations, coach the agent being monitored, and join a chat in progress.

Chapter 12, "Troubleshooting," provides a list of troubleshooting tips for both the CJP Management Portal and the Agent Desktop.

Appendix A, "CJP Report Parameters," describes the parameters available in CJP reports.

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

1 Introduction

The Cisco© Customer Journey Platform (CJP) service enables your enterprise to cost-effectively manage disparate contact centers across geographical and organizational boundaries with control, visibility, and quality. This chapter provides an overview of the CJP service and its features.

Topics covered in this chapter:

- CJP Overview
- About Sites, Teams, Entry Points, and Queues for Voice
- CJP Management Portal
- CJP Modules
- About Time Zones

CJP Overview

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

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

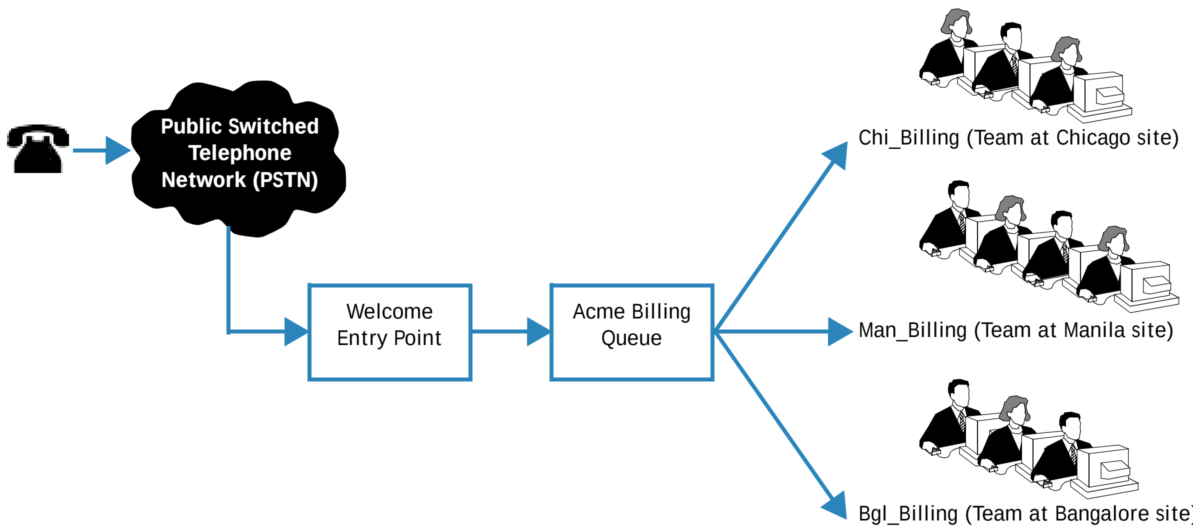
Cisco's CJP offers a unique solution that combines contact center and IP technologies in a global call management service. The CJP solution is built on the Cisco Midpoint Call Management® technology—a centralized control point for managing and monitoring calls and contacts across a heterogeneous contact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

Offered as a cloud service, CJP provides enterprises with full control over their global contact center queues and creates the appearance of a single, unified contact center environment. Calls, chats and emails are distributed to the contact center sites while agents are available. When agents are occupied, contacts are queued centrally so they can be serviced by the next available agent irrespective of that agent's physical location.

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

About Sites, Teams, Entry Points, and Queues for Voice

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



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

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

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

The following diagram illustrates the Acme tenant profile hierarchy.

- Acme (CJP Tenant)
  - Chicago (Site)
    - Chi_Billing (Team)
    - Chi_Sales (Team)
    - Chi_GoldCustomerService (Team)
  - Manila (Site)
    - Man_Billing (Team)
  - Bangalore (Site)
    - Bgl_Billing (Team)
    - Bgl_GoldCustomerService (Team)
    - Bgl_Experts (Team)
  - Welcome (Entry Point)
  - AcmeSales (Queue)
  - AcmeBilling (Queue)
  - GoldCustomerService (Queue)

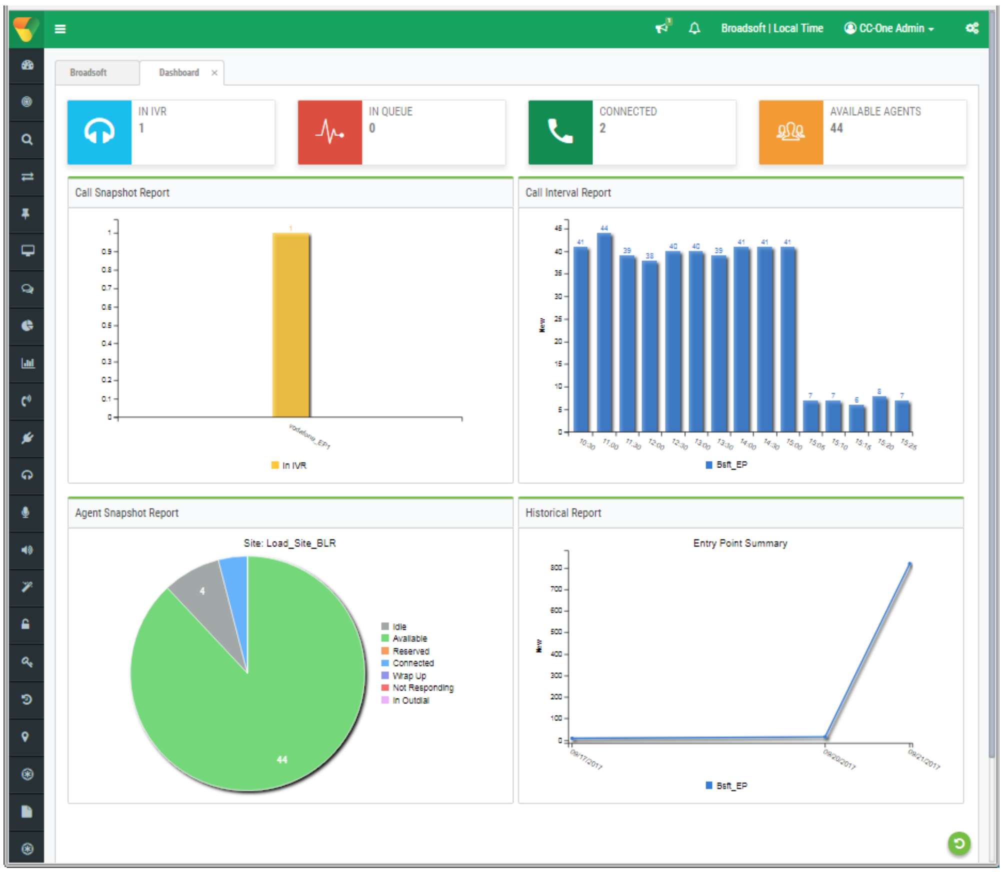
Telecom managers, contact center managers, and other representatives of the enterprise who are authorized to access the CJP service are provided with a view of contact center activity at their enterprise through the CJP Management Portal.

In addition to sites, teams, entry points, and queues, the Provisioning module of the CJP Management Portal provides an interface for adding agents and assigning them to teams. Each agent is configured with an agent profile—a value assigned to an agent that determines the agent's permission levels and Agent Desktop behaviors, including which wrap-up and idle codes are available to the agent. Thus, you should add wrap-up and idle codes to before defining agent profiles, and define agent profiles before defining agents. If your enterprise is provisioned with the optional skills-based routing feature, you should also add skills and skill profiles before defining teams and agents.

CJP Management Portal

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

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



Access to CJP modules and functionality is restricted based on the user profiles assigned to users.

For information about accessing and working with the CJP Management Portal, see Chapter 2, “Getting Started,” beginning on page 21.

CJP Modules

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

Module	Description
Provisioning	Enables authorized users to view the settings provisioned for the enterprise and to create, edit, and view provisioned resources based on user access privileges. Provides access to Audit Trail, Agent Skill Report, Provisioned Items Report, and Provisioned Skills Report. For details, see Chapter 3, "Provisioning CJP Resources," beginning on page 13.
Analyzer	Optional module that enables authorized users to segment, profile and visualize the data in contact center systems and identify key variables that impact productivity and desired business outcomes. For details, see the *CJP Customer Engagement Analyzer User Guide*.
Analyzer Data Exchange	Enables authorized users of the optional Analyzer module to create and modify the Analyzer schema.
Business Rules	Enables authorized users of the Analyzer module to incorporate customer data into the CJP environment for custom routing as well as for general implementation.
Agent Desktop	Provides access to an interface for handling customer contacts.
Campaign Manager	Optional module that provides campaign and list management for outbound voice and email campaigns.
Real-Time Reports	Provides real-time visibility into contact center activity throughout the enterprise. Using a standard Web browser, contact center managers and other authorized users can access call statistics for each site, team, agent, skill, queue, and entry point, and can view current call volume and threshold adherence. For details, see Chapter 5, "Real-Time Reports," beginning on page 197.
Historical Reports	Provides access to reports that can be viewed online through a Web browser or downloaded to a data analysis tool such as Microsoft Excel. Summary reports provide half-hourly information on call volume and call duration. Detailed reports on agent activity, wrap-up and idle code usage, skills, monitored calls, and threshold alerts are also available. This information allows your enterprise to track busy hours and the average time it takes to handle calls. Authorized users can create their own reports by selecting the data they want included. For details, see Chapter 6, "Historical Reports," beginning on page 255.
Web Callback Request Report	Enables authorized users to view information about Web callback requests. For details, see "Viewing a Web Callback Request Report" on page 40.
Routing Strategy	Provides a Web-based user interface for managing and configuring call-handling strategies. Authorized users can create and schedule global call-routing and team capacity strategies and alter them in real time in response to changes in business dynamics. For details, see Chapter 4, "Contact Routing," beginning on page 113.

Module	Description
Call Monitoring	Enables authorized users to silently monitor the quality of service being delivered across their multi-source contact centers. The power of the CJP service lies in the unique ability to monitor any call across any site. Through a simplified Web interface, users can select the queue, team, site, or agent they want to silently monitor. Authorized users can provide instructions to the monitored agent without being heard by the caller, and can join a call being monitored and participate in the conversation. For details, see Chapter 7, "Call Monitoring," beginning on page 307.
Call Recording	Optional module that enables authorized users to record calls. For details, see Chapter 8, "Call Recording," beginning on page 321.
Recording Management	Optional module that enables authorized users to search for and play calls recorded through the CJP Call Recording feature. For details, see Chapter 9, "Recording Management," beginning on page 325.
Workforce Optimization	Optional module that provides access to Workforce Management, Quality Management, and WFO Analytics, including Speech, Text, and Desktop Analytics.
Account Unlock	Enables authorized users to unlock agent accounts that have been locked because the agent entered an incorrect password more than a specified number of times in succession. For details, see "Unlocking Locked Agent Accounts" on page 37.
Password Reset	Enables authorized users to reset or reassign passwords for one or more agents at specified sites and on specified teams. For details, see "Resetting Agent Passwords" on page 37.
Audit Trail	Enables authorized users to view details about provisioning changes made for their enterprise. For details, see "Accessing an Audit Trail Report" on page 39.
Usage Metrics Report	Enables authorized users to view usage metrics for up to 13 months. For details, see "Viewing Usage Metrics" on page 39.
Release Notes	Enables authorized users to view and download release notes. For details, see "Accessing Release Notes" on page 42.
MM Provisioning	Enables authorized users to provision resources used by the email and chat channels. For details, see "Multimedia Provisioning" beginning on page 335.
MM Agent Desktop	Enables authorized users to monitor their assigned email and chat queues and the agents assigned to those queues, reallocate and reject contacts, approve email responses, silently monitor chat conversations, coach the agent being monitored, and join a chat in progress. For details see "Multimedia Agent Desktop" beginning on page 389.
MM Reports	TBD

About Time Zones

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

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

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

To specify a different time zone for displaying the time values in routing strategies, see "Understanding Time Values in Routing Strategies" on page 153.

2 Getting Started

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

Topics covered in this chapter:

CJP Management Portal Prerequisites

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

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

The MM Administrator and MM Agent Desktop modules require Mozilla Firefox 38 or higher.

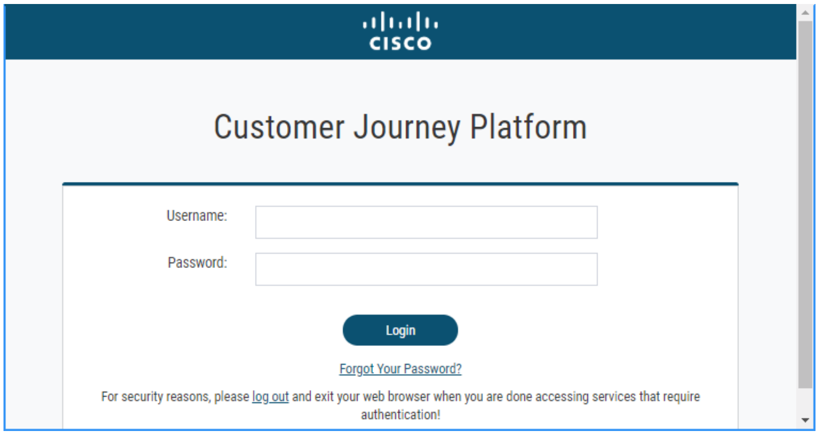
Note: For better performance, recommended browser for the CJP Management Portal is Mozilla Firefox or Google Chrome.

Logging In to the CJP Management Portal

You log in to the CJP Management Portal through a Web browser, using login information provided to you by your CJP service provider. Your access to modules and functionality is determined by permissions assigned by your site administrator.

To log in to the CJP Management Portal:

1. Open a Web browser and navigate to the URL provided to you.
2. Enter your user name and password. Note that the password is case sensitive.



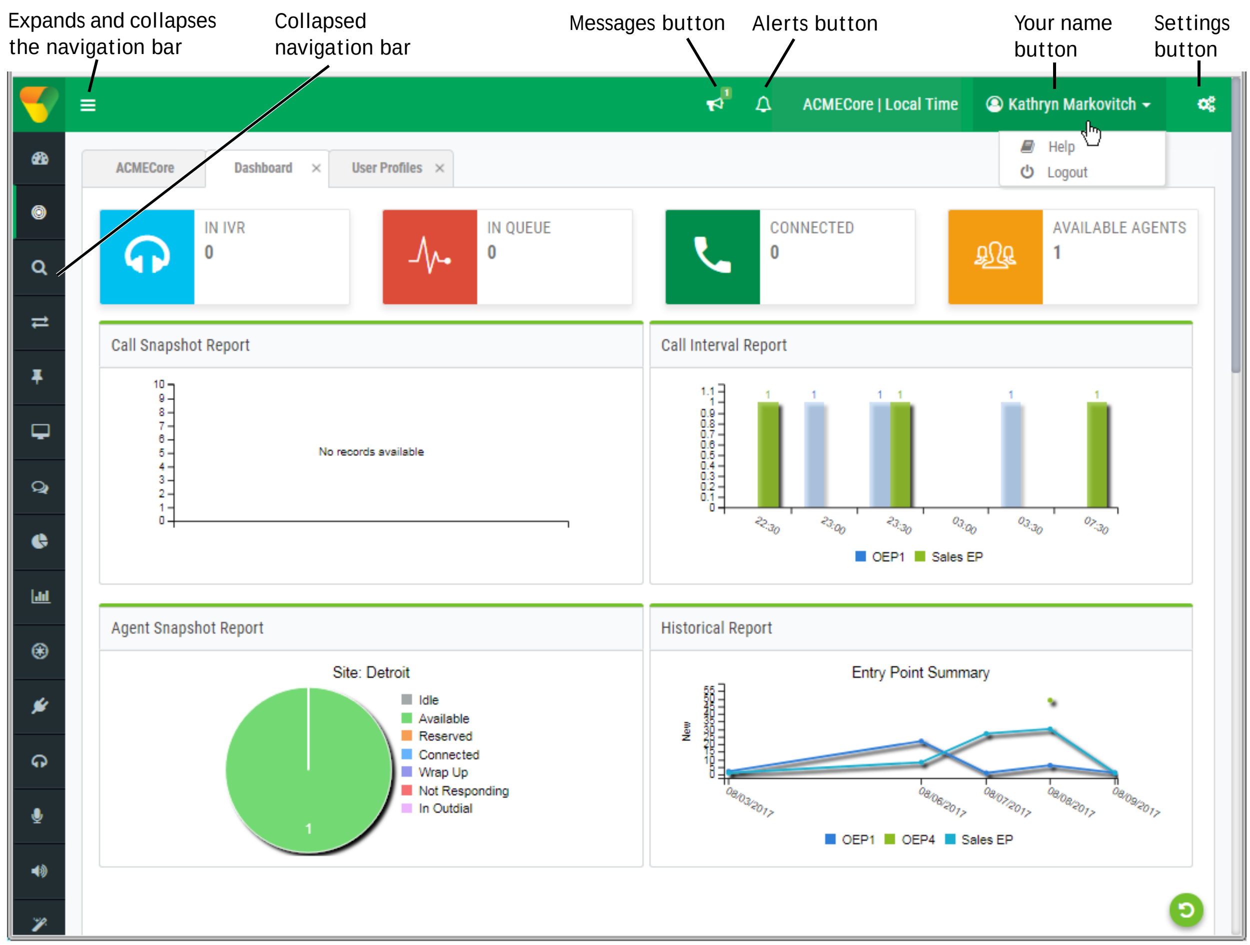
3. Click **Login**.

The Management Portal landing page appears. For more information about the landing page, see "Working with the CJP Management Portal" on page 23.

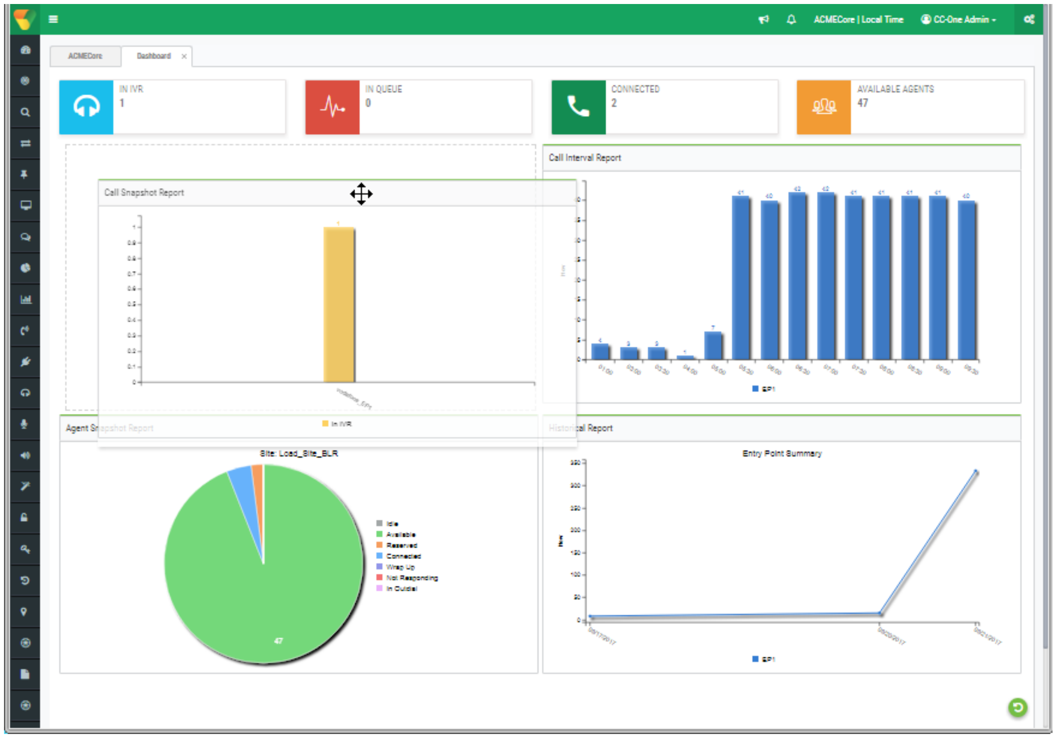
Note: After you log out, close all CJP windows before logging in again.

Working with the CJP Management Portal

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



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



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

Component	Description
Navigation bar	Displays links to the modules that you are authorized to access (see the next section, "Accessing CJP Modules"). Each link displays either the name of a module or, if the navigation bar is collapsed, an icon that represents the module. Point to an icon to display the module name. To expand or collapse the navigation bar, click the ≡ button on the upper-left side of the landing page.

Component	Description
Reports panel	Widgets at the top of the panel display counts of the number of calls currently in IVR, in queue, and connected, and the number of currently available agents. The rest of this panel displays three charts that provide real-time statistics for current call activity, interval call activity, and site-level agent activity, and a fourth chart that provides historical statistics. These charts are from the default reports specified in the Real-Time Reports and Historical Reports modules. You can change what is displayed in these charts by specifying different default reports from within these modules. You can click a chart to display the corresponding report in the Real-Time Reports or Historical Reports module window. To change the size of a chart, point to a corner or edge and when the mouse pointer changes to a two-headed arrow, drag the corner or edge to shrink or enlarge the chart. To restore the original size of resized charts, click the **Reset Widgets** button on the lower-right left of the page.
Messages button	Displays system messages (see "Displaying Broadcast Messages" on page 29 for more information).
Alerts button	Visible only if your enterprise subscribes to the Supervisory Alerts feature (see "Responding to Supervisory Alerts from Agents" on page 28).
Settings button	Expands and collapses a three- or four-tabbed panel where you can do the following: • Select a different user interface skin (see "Changing the Colors on Your Management Portal Pages" on page 30). • Customize the user interface banner color and images used on the Management Portal pages. The tab displaying these settings appears only if authorized by your user profile (see "Creating a Custom Theme" on page 31). • Change your password (see "Changing Your Password" on page 29). • Change the time zone in which the time values in routing strategies are displayed (see "Understanding Time Values in Routing Strategies" on page 153). • View and update the API key assigned to your user account (see "Viewing and Regenerating Your API Key" on page 32).
Your name button	Displays two options in a drop-down list: • **Help**: Opens a Help window (see "Getting Help" on page 32). • **Logout**: Logs you out of the Management Portal after closing all open modules.

Accessing CJP Modules

To access a CJP module:

➤ After signing in to the Management Portal, click the link on the navigation bar that represents the appropriate module.

If the navigation bar is collapsed, you can click the ☰ button on the upper-left side of the Portal landing page to expand it (see the illustration on page 23).

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

Access this module	To do this
Provisioning	View settings provisioned for your enterprise. Create and edit CJP users, queues, entry points, DN to entry point mappings, sites, skills and skill profiles, multimedia profiles, threshold rules, teams, idle and wrap-up codes and work types to associate them with, address books, password policies, user and agent profiles, business metrics, and call-associated data variables for use in call control scripts. Add agents to the system and assign them to teams, and delete, activate, and unlock agent accounts. Access Provisioned Items reports. For details, see "Provisioning CJP Resources" beginning on page 21.
Analyzer	Segment, profile and visualize the data in your contact center system and identify key variables that impact productivity and desired business outcomes. For details, see the *CJP Customer Engagement Analyzer User Guide*.
Analyzer Data Exchange	Create and modify the Analyzer schema.
Business Rules	Incorporate customer data into the CJP environment for custom routing as well as for general implementation.
Agent Desktop	Handle customer contacts. For details, see the CJP *Agent Desktop User Guide*.
Campaign Manager	Manage outbound voice and email campaigns.
Real-Time Reports	View real-time statistics and key performance indicators across all call center sites, teams, and agents. For details, see "Real-Time Reports" beginning on page 197.
Historical Reports	View saved historical reports, create new reports, and adjust report parameters. For details, see "Historical Reports" beginning on page 255.
Web Callback Request Report	View information about Web callback requests. For details, see "Viewing Usage Metrics" on page 39.
Routing Strategy	Create scheduled routing strategies and team capacity strategies and make real-time adjustments to call center traffic flow. For details, see "Contact Routing" beginning on page 113.

Access this module	To do this
Call Monitoring	Silently monitor calls at any site for any team or agent, provide instructions to the monitored agent without being heard by the caller, and join a call being monitored and participate in the conversation. For details, see “Call Monitoring” beginning on page 307.
Call Recording	Record calls at any site for any team or agent. For details, see “Call Recording” beginning on page 321.
Recording Management	Search for and play calls recorded through the CJP Call Recording feature. For details, see “Recording Management” beginning on page 325.
Workforce Optimization	Access Workforce Management, Quality Management, and WFO Analytics, including Speech, Text, and Desktop Analytics.
Account Unlock	Unlock locked user accounts at specified sites and on specified teams. For details, see “Unlocking Locked Agent Accounts” on page 37.
Password Reset	Reset or reassign passwords for one or more agents at specified sites and on specified teams. For details, see “Resetting Agent Passwords” on page 37.
Audit Trail	View details about the changes made to the provisioning database tables for your enterprise anytime during the past two weeks and export the data to a data analysis tool such as Microsoft Excel.
Usage Metrics Report	View usage metrics for up to 13 months. For details, see “Viewing Usage Metrics” on page 39.
Release Notes	View and download release notes. For details, see “Accessing Release Notes” on page 42.
MM Provisioning	Provision resources used for email, and chat. For details, see “Multimedia Provisioning” beginning on page 335.
MM Agent Desktop	Monitor assigned email and chat queues and the agents assigned to those queues, reallocate and reject email contacts, approve email responses, silently monitor chat conversations, coach the agent being monitored, and join a chat in progress. For details see “Multimedia Agent Desktop” beginning on page 389.
MM Reports	TBD

Responding to Supervisory Alerts from Agents

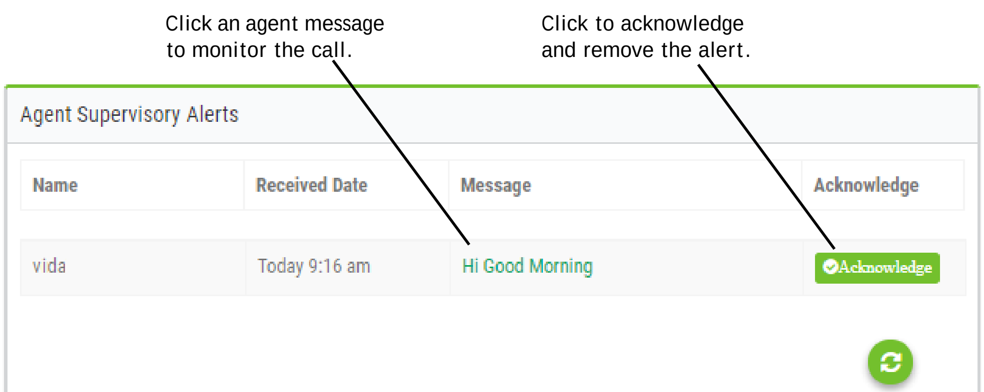
If your enterprise subscribes to the Supervisory Alerts feature, an agent can send a midcall monitor request during a call to all logged-in supervisors whose user profiles permit midcall monitoring and access to the supervisory alert feature and to the queue, site, and team of the requesting agent. In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

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

To respond to a supervisory alert:

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

   The window displays unacknowledged alerts grouped by agent name.



2. To monitor the call:

   a. Click the agent message to open the Call Monitoring module populated with the agent data required to monitor that agent.

   b. Enter your callback number and click the **Midcall Monitor** button.

3. To remove the message from the Agent Supervisory Alerts window and from other CJP Management Portal landing pages and update the database:

   a. In the **Agent Supervisory Alerts** window, click an **Acknowledge** button to the right of the alert message.

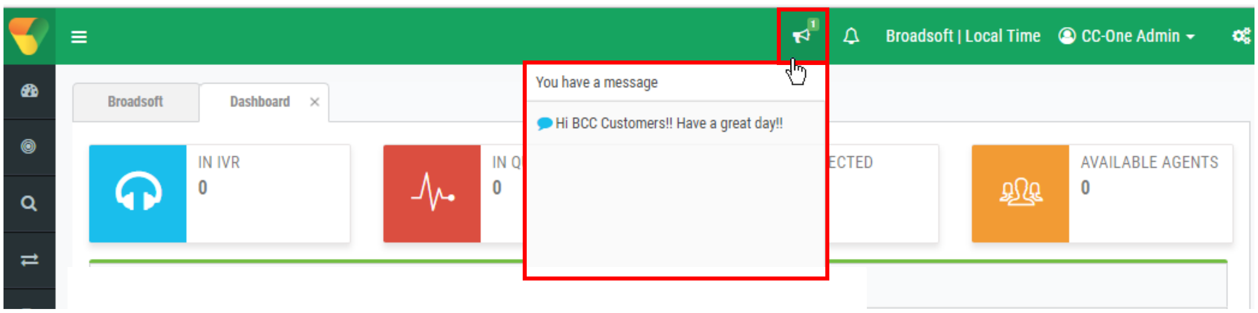
   b. In the dialog box acknowledging the request, click **OK**. Then, In the dialog box acknowledging successful deletion of the alert, click **OK**.

4. To update the data in the open Agent Supervisory Alerts window more often than every 30 seconds, click the Reload button on the lower right side of the window.

Displaying Broadcast Messages

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

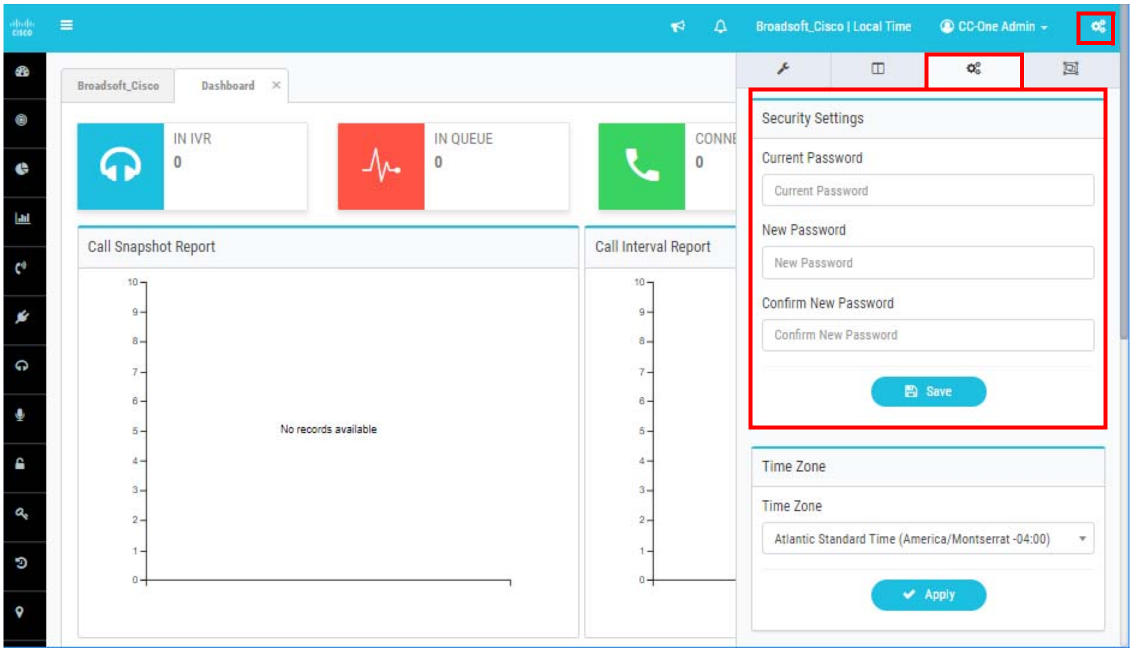
When a broadcast message arrives, the Message button displays a count of the number of messages that have not expired. To view messages, click the button to open the message window. Click the button again to close the window.



Changing Your Password

To change your password:

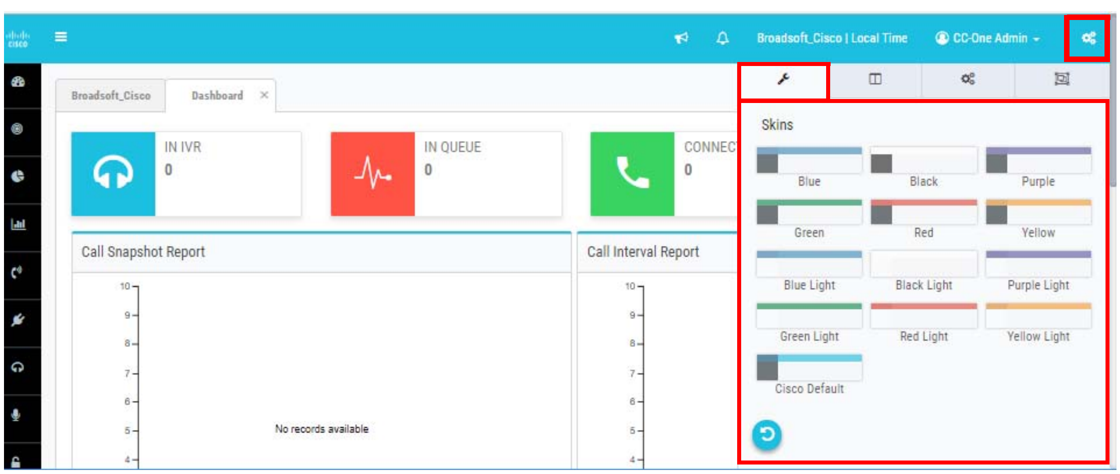
1. Click the gears icon in the upper-right corner of the Portal landing page to display the settings panel.
2. Click the tab displaying the gears icon, and under **Security Settings**:
   a. Type your current password in the **Current Password** box.
   b. Type your new password in the **New Password**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



Changing the Colors on Your Management Portal Pages

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

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

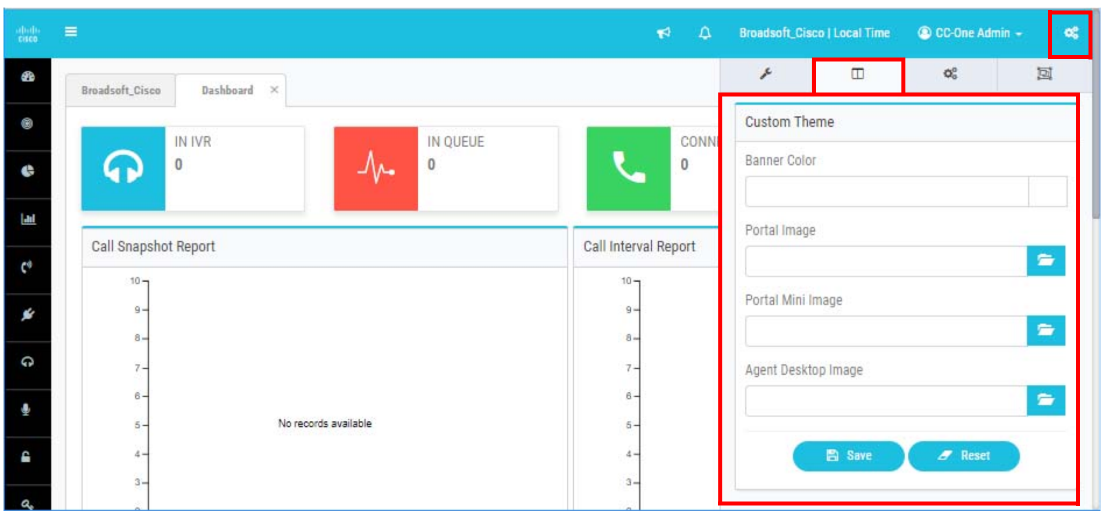


Creating a Custom Theme

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

To create a custom theme:

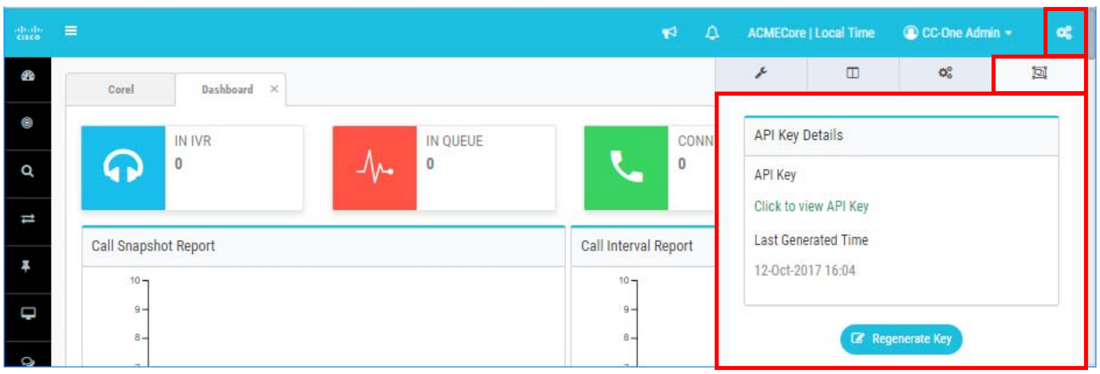
1. Click the gears icon on the upper-right side of the Portal landing page to display the settings panel.
2. Click the tab displaying the icon to display the **Custom Theme** settings.
3. Under **Banner Color**, either type the HTML (hexadecimal) code for a color or click inside the small box on the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



Viewing and Regenerating Your API Key

To view or regenerate your API key:

1. Click the gears icon in the upper-right corner of the Portal landing page to display the settings panel.
2. Click the tab displaying the icon to display the API Key Details panel.
3. To immediately regenerate your API key, click the **Regenerate Key** button.



Getting Help

Topics covered in this section:

- Displaying Online Help
- Navigating the Help System
- Searching the Help System
- Resizing the Navigation Frame
- Printing a Help Topic

See also "Accessing Release Notes" on page 42.

Displaying Online Help

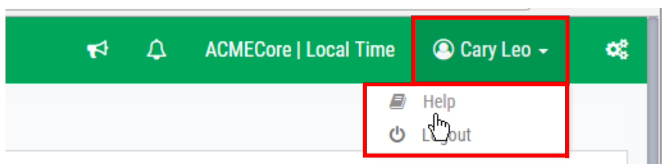
After you sign in to the CJP service, you can access online Help at any time.

To display online Help:

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

-OR-

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

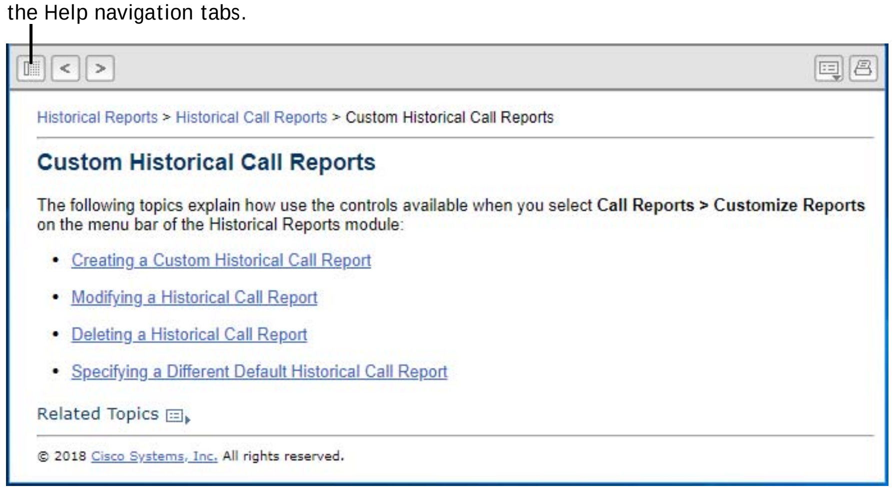


A topic relating to the current CJP page is displayed.

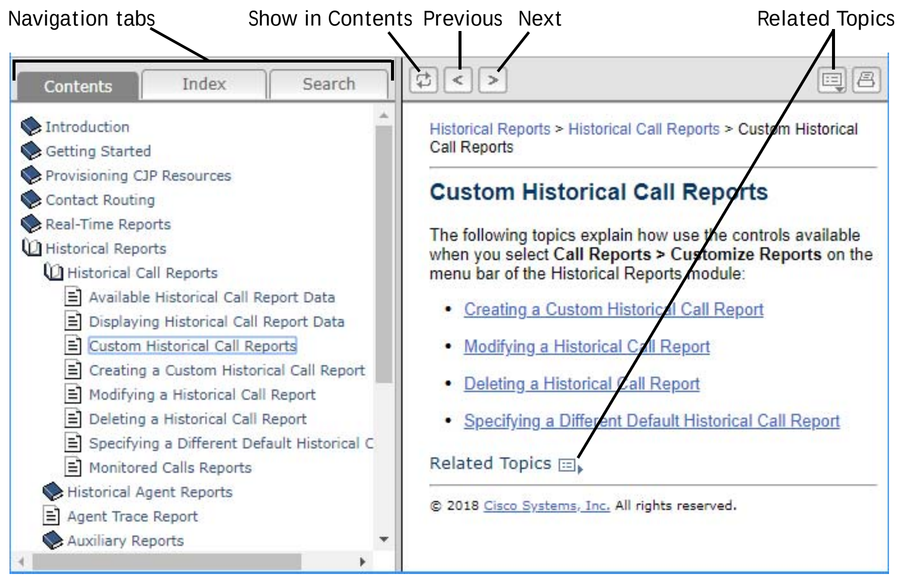
Navigating the Help System

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

Click this button to display the Help navigation tabs.



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



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

Control	**Description**
Show in Contents button	Locates and highlights the entry in the Contents tab that corresponds to the currently displayed topic. Brings the Contents tab to the front if it is not already the foremost tab.
Previous button	Displays the topic that precedes the currently displayed topic in the Help system. To display the last topic viewed, click the **Back** button on the browser toolbar.
Next button	Displays the next topic in the Help system.
Related Topics button	Opens a list of topics related to the currently displayed topic. Click a link in the list to display that topic.
Navigation tabs	Provides core navigation: • The **Contents tab** displays the hierarchy of topics in a collapsible and expandable tree view. Click a closed book icon to see a list of subtopics. Click an open book icon to collapse the list. Click the text next to a book or page icon to display the associated Help topic. • The **Index tab** displays index entries. You can scroll the list to find the entry you want. Click an index entry to display the corresponding topic. If more than one topic corresponds to the entry, a list of the topics is displayed in the topic frame. • The **Search tab** provides a search function. For more information, see “Searching the Help System” on page 35.

Searching the Help System

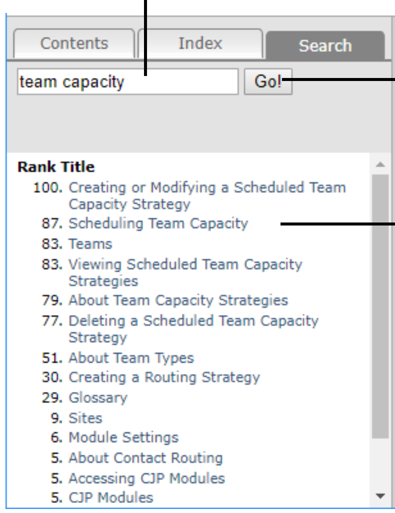
When you search for multiple words, the search finds Help topics containing all the words you entered.

To search the Help system:

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

   A list of all Help topics containing the word or phrase you entered is displayed. The topics are ranked in order of relevance.
4. Click a topic in the list to display it.

Type your search word or phrase here . . .



. . . then click **Go.**

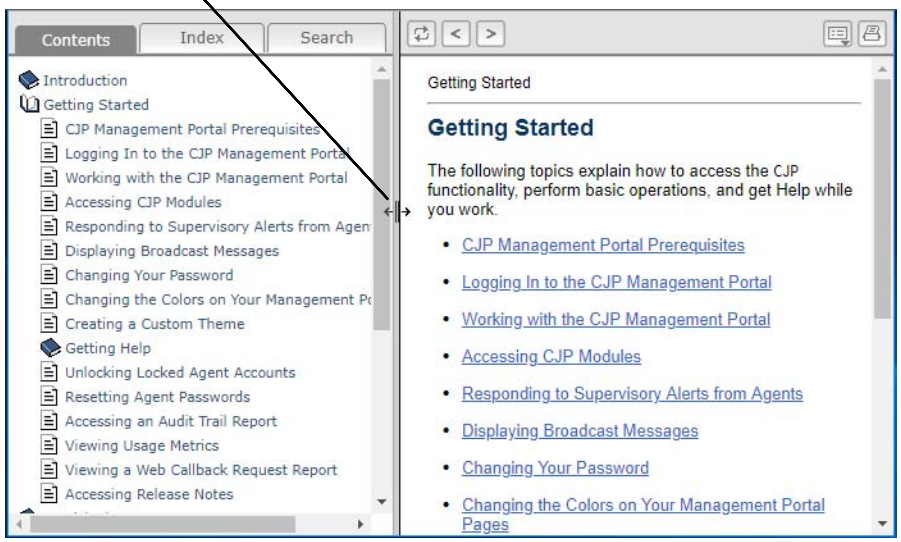
The found topics are ranked in order of relevance. Click a topic title to display the associated topic.

Resizing the Navigation Frame

To resize the navigation frame:

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

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



Printing a Help Topic

To print a Help topic:

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

Click this button to print the topic.

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

Unlocking Locked Agent Accounts

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

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

To unlock the account of one or more agents:

1. On the CJP Portal navigation bar, select **Account Unlock**.
2. On the Unlock Agents page, select a site from the **Sites** drop-down list, select a site to display a list of teams at that site to which you have access.
3. From the **Teams** drop-down list, select a team to display the Unlock Agents page for that team.
4. Select the check box to the left of each listed agent whose account you want to unlock or select the check box at the top of the Agent Login column to select all listed agents.
5. Click the **Unlock Agents** button at the bottom of the page. Then, in the confirmation dialog box, click **Yes**.

   A message on the upper-right side of the page informs you that the agent bulk operation has been initiated and provides a batch name for the operation.
6. To find out if the bulk operation succeeded and if not, the reason for failure, open the **Provisioning** > **Bulk Operations Status** page (see "Checking the Status of a Bulk Operation" on page 110 for more information).

Resetting Agent Passwords

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

To change the password of one or more agents:

1. On the CJP Portal navigation bar, select **Password Reset**.
2. From the **Sites** drop-down list, select a site to display a list of teams at that site to which you have access.

3. From the **Teams** drop-down list, select a team to display the Password Reset page for that team.

4. Select the check box to the left of each listed agent whose password you want to change or select the check box at the top of the Agent Login column to select all listed agents.

5. Click the **Reset Password** button at the bottom of the page.

6. In the Password Settings dialog box, specify the password settings as described in the following table and then click **Save**.

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

7. A message on the upper-right side of the page informs you that the agent bulk operation has been initiated and provides a batch name for the operation. To find out if the operation succeeded and if not, the reason for failure, open the **Provisioning** > **Bulk Operations Status** page (see "Checking the Status of a Bulk Operation" on page 110 for more information).

Accessing an Audit Trail Report

The Audit Trail page provides an interface where authorized users can view details about the changes made to the provisioning database tables for your enterprise during any seven-day period and download the data as a Microsoft Excel or Adobe PDF file

To display an audit trail report:

1. On the CJP Portal navigation bar, select **Audit Trail**.
2. On the Audit Trail page:
   a. From the **Entity** drop-down list, select the entity you are interested in.
   b. From the **Action** drop-down list, select an action: **All**, **Create**, **Delete**, or **Update**.
   c. Click in the **Time Period** field to display the calendar controls and then select a date range of eight days or less and click **Apply**.
   d. Click the **Apply Filters** button.

To download the data, click the **Download PDF** or **Download EXCEL** button.

Viewing Usage Metrics

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

To view usage metrics:

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

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

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

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

Viewing a Web Callback Request Report

If your enterprise uses the optional Web Callback feature (described in "About Web Callback" on page 124), authorized users can view the Web Callback Request Report. This report displays details about Web callback requests and, if your enterprise uses the Voice Callback feature, about voice callback requests.

To access the report:

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

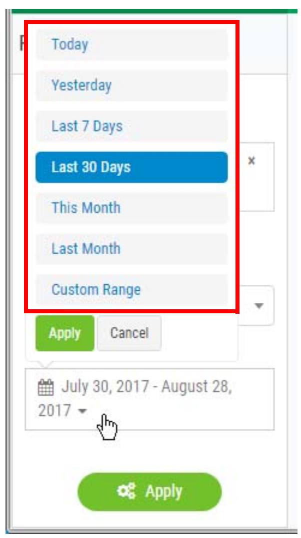
   The Web Callback Request Report page appears.

2. In the **Report Filter** panel on the left side of the page, select the outdial entry points you want to include in the report.

3. From the **Call Status** drop-down list, select one of the call status values described in the following table or select **All** to include all call status values in the report.

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

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



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

5. Click **Apply**.

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

Column	Description
Request Id	An ID number assigned by the system to the callback request.
Outdial Entry Point Name	The name of the outdial entry point that was used to place the call to the requester.
Number of Callback Attempts	The number of times the system attempted to call the requester.
Results of Last Callback Attempt	For a description of each value that can appear in this column, see the table describing Call Status values on page 41 (beneath step 3).
Callback Time	The date and time the system placed the call to the requester.
Number	The phone number that the system used to call the requester.
First Callback Attempted Time	The time of the first callback to this requester.
Last Callback Attempted Time	The time of the last callback to this requester.
Created Date	The date the callback request was sent by the Callback Manager to the server.

Accessing Release Notes

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

To access release notes:

1. On the CJP Portal navigation bar, select **Release Notes**.

   The Release Notes page appears, displaying links to the available files.

2. To search for a specific file, enter one or more characters in the **Search** box on the upper-right side of the Release Notes page to display only those file names that include the character sequence you entered.

3. Click the link to the file you are interested in. Then you can open, save, or download the file depending on which browser you are using and your browser settings.

3 Provisioning CJP Resources

The Provisioning module enables authorized users to view, edit, delete, and create provisioned resources based on their user access privileges.

Note: If your enterprise subscribes only to CJP Scorecard Routing, provisioned resources include only tenant settings, entry points, queues, sites, teams, business metrics, CJP Portal users, and, optionally, call-associated data variables.

Topics covered in this chapter:

- Tenant Settings
- Entry Points and Queues
- DN to Entry Point Mapping
- Multimedia Profiles
- Multimedia Enabler
- Multimedia Extensions
- Sites
- Skill Definitions
- Skill Profiles
- Business Metrics
- Teams
- Threshold Rules
- Work Types
- Idle and Wrap-up Codes
- Address Books
- Outdial ANI
- Dial Plans
- Password Policy
- Agent Profiles
- Call-Associated Data Variables
- CJP Users
- Provisioned Items Reports

Tenant Settings

To view the tenant settings provisioned for your enterprise:

➤ On the CJP Portal navigation bar, select the link under **Provisioning** that displays the name of your enterprise.

The page displays the **General Settings** tab and links to the following additional tabs. Recently created tenants will not see the *Module Permissions*, *Other Permissions* and *Publishing Settings* tabs.

- General Settings
- Provisioning
- Settings
- Module Permissions
- Other Permissions
- Publishing Settings
- SIP

General Settings

The General Settings tab displays the settings described in the following table. The **Tenant** column identifies settings that can be specified by authorized users at your enterprise. To edit settings, click the **Edit** button at the bottom of the page.

The **SP** column identifies settings the service provider administrator specifies. The **CJP** column identifies settings specified by the CJP administrator.

Setting	Description	Tenant	SP	CJP
Tenant Details				
Name	The name of your enterprise.		X	X
Description	An optional description.	X	X	X
Login Domain	The value used to uniquely identify a topic for your enterprise in the internal data exchange (IDX) and customer data exchange (CDX) servers.		X	X
Time Zone	The time zone provisioned for your enterprise (see “About Time Zones” on page 20).	X	X	X
Tenant Configuration XML URL	The location of the configuration file containing additional settings for your enterprise.			X

Setting	Description	Tenant	SP	CJP
IVR Park URL	The path for the audio file that will be played while a call is in queue. The audio file name is specified in the CJP Routing Strategy module and concatenated to the path specified in this field. **Note:** If a tenant's IVR Park URL is changed, each routing strategy for the tenant must be edited and saved.			X
Status	This setting is not editable.			
Address Details				
Street	The street address, city, state, country, and zip code of the primary contact.	X	X	X
City				
State				
Country				
Zip Code				
Tenant Contact Details				
First name	The first name of the tenant administrator.	X	X	X
Last Name	Last name of the tenant administrator.	X	X	X
Email	The email address of the tenant administrator.		X	X
Work	Work phone number of the tenant administrator.	X	X	X
Mobile	Mobile phone number of the tenant administrator.	X	X	X
Watson Analytics Details				
Watson Base Url	Optional feature that allows for sentiment analysis for the conversation between the customer and the agent in chat interactions. The tenant signs up for an IBM Watson account and obtains the values needed in these fields. The Watson Base Url field is displayed only on the Edit page.	X	X	X
Watson User Name				
Watson Password				

Provisioning

The Provisioning tab displays the settings described in the following table. These settings can be specified by the service provider administrator and the CJP administrator.

Setting	Description
System Profile	
Maximum Provisioned Users	The maximum number of users that can be defined for your enterprise.
Standard Agents - Inbound Voice	If set to **Yes**, your enterprise includes agents who use only the voice channel to interact with customers.
Premium Agents - Inbound Multichannel	If set to **Yes**, your enterprise includes agents who use a channel such as email or chat in addition to the voice channel to interact with customers.

Setting	Description
Workforce Options	If set to **Yes**, one or more of the Workforce Optimization options are enabled for your enterprise: Quality Management, Workforce Management, WFO Analytics, Workforce Analytics with Transcriptions, or the Workforce Optimization Bundle.
Campaign Management	If set to **Yes**, the Campaign Manager module is enabled for your enterprise.
Recording Storage	Specifies the number of months call recordings will be retained. Recordings made prior to the specified number of months are removed. A month is defined as 31 days, and one additional day is added to the total number of days before the recordings are deleted. Thus, 1 month means 32 days; 2 months means 31 days x 2 + 1 day = 63 days. **Note:** • This field is hidden if the pruning strategy is not time based. • For some tenants, this field might show the value in days.
Speech Enabled IVR	If set to **Yes**, Speech Enabled IVR is enabled for your enterprise.
Web Callback Option	If set to **Yes**, Web Callback is enabled for your enterprise.

Settings

The Settings tab displays the settings described in the following table. Asterisks (*) indicate settings that are not displayed for tenants configured with a Standard license. The **Tenant** column indicates settings that can be specified by authorized users at your enterprise. To edit settings, click the **Edit** button at the bottom of the page.

The **SP** column identifies settings the service provider administrator specifies. The **CJP** column identifies settings specified by the CJP administrator.

Setting	Description	Tenant	SP	CJP
Call Settings				
Short Call Threshold	The time interval, in seconds, that determines whether a call is considered short or abandoned.	X	X	X
Sudden Disconnect Threshold	The time interval, in seconds, that determines whether a call is considered handled or was terminated so quickly as to possibly indicate an issue with connectivity or agent behavior. A call that is terminated after being distributed to a destination site, but within this time interval, is considered to be a *disconnected* call.	X	X	X
Maximum Active Calls	The maximum number of active calls allowed. Neither the Outdial Maximum Active Calls nor the Inbound Maximum Active Calls can exceed this value. When CJP Portal users add or edit an entry point or queue, the value they enter for Inbound Maximum Active Calls and or Outdial Maximum Active Calls are validated against this value.		X	X

Setting	Description	Tenant	SP	CJP
Inbound Maximum Active Calls	The maximum number of inbound calls that can be active. This includes all site, team, DN, queued, and in-process calls. A call that arrives after the maximum has been reached is busied out.		X	X
Outdial Maximum Active Calls	The maximum number of active outdial calls across the tenant.		X	X
Other Settings				
Allow Agent Threshold	This field specifies whether or not the Agent Threshold Alerts feature is enabled for your enterprise. The Threshold Alerts feature is enabled for all tenants with a Standard or Premium license.	X	X	X
Maximum Callback Attempts	The number of times the system will attempt a requested callback if the initial callback attempt fails.	X	X	X
Retry Callback Interval	The number of seconds between callback attempts in the event the initial callback attempt fails.	X	X	X
Pause/Resume Enabled	If set to **Yes**, agents can click the Privacy Shield button during a call to pause and resume potential call recording. For example, the agent might need to pause potential call recording while obtaining a credit card number or other protected information. If set to **No**, this feature can be enabled for individual queues (see "Adding an Entry Point or Queue" on page 53). **Note:** The Privacy Shield button is displayed on the Agent Desktop only if the Privacy Shield feature is enabled in your CJP service configuration.	X	X	X
Recording Pause Duration	If *Pause/Resume Enabled* is set to *Yes*, this setting specifies how many seconds call recording will be paused if the agent does not click the *Turn Off Privacy Shield* button earlier.	X	X	X
Allow Password Reset	If set to **Yes**, the Password Reset module is enabled for your enterprise (see "Resetting Agent Passwords" on page 37).	X	X	X
Check Agent Availability	If set to **Yes**, teams with no logged in agents can be excluded for consideration as the routing strategy escalates over time. If set to **No**, the *Check Agent Availability* setting can be enabled for individual inbound queues (see "Adding an Entry Point or Queue" on page 53).	X	X	X
Record All Calls	If set to **Yes**, all inbound and outdial calls will be recorded. If set to **No**, calls will be recorded based on settings for each queue.	X	X	X

Module Permissions

Note: Recently created tenants will not see this tab.

The Module Permissions tab displays the settings described in the following table. The **Tenant** column indicates settings that can be specified by authorized users at your enterprise. To edit settings, click the **Edit** button at the bottom of the page.

The **SP** column identifies settings the service provider administrator specifies. The **CJP** column identifies settings specified by the CJP administrator.

Setting	Description	Tenant	SP	CJP
SCR Enabled	If set to **Yes**, the CJP Scorecard Routing feature is enabled for your enterprise (see "About CJP Scorecard Routing" on page 117).		X	X
Threshold Alerts Enabled	If set to **Yes**, the Threshold Alerts feature is enabled for your enterprise (see "Threshold Rules" on page 75).		X	X
Maximum Threshold Rules	The maximum number of active threshold rules that can be defined for your enterprise.		X	X
SBR Enabled	If set to **Yes**, the Skills-Based Routing (SBR) feature is enabled for your enterprise.		X	X
Maximum Skills	The maximum number of skills that can be defined for your enterprise.		X	X
Maximum Text Skills	The maximum number of text skills that can be defined for your enterprise.		X	X
Multimedia Enabled	If set to **Yes**, the Multimedia feature is enabled for your enterprise (see "About Multimedia" on page 123).		X	X
Multimedia Extensions Enabled	If set to **Yes**, Multimedia Extensions are enabled for your enterprise (see "About Multimedia" on page 123 and "Multimedia Extensions" on page 65).		X	X
Maximum Channels Per Profile	The maximum number of channels that can be specified for a multimedia profile. Visible only if Multimedia is enabled (see "Multimedia Profiles" on page 62).		X	X
Voice Callback Enabled	If set to **Yes**, the *Callback* call control block is available for use in call control scripts (see "Callback Block" on page 135). A *Yes* setting here automatically sets *Web Callback Enabled* to *Yes*.		X	X
Web Callback Enabled	If set to **Yes**, the Web Callback feature is enabled for your enterprise (see "About Web Callback" on page 124). **Note:** If *Voice Callback Enabled* is set to *Yes*, then Web Callback Enabled is automatically set to *Yes* and cannot be changed to *No.*		X	X
Recording Management Enabled	If set to **Yes**, the Recording Management module is enabled for your enterprise.		X	X

Setting	Description	Tenant	SP	CJP
Recording Pruning Strategy	If the Recording Management module is enabled for your enterprise, specifies the recording pruning strategy for the enterprise: *No Pruning*, *Time Based*, *Agent Minutes*, or *Storage Based*. When a changes is made to this setting, an email is sent to all users who are authorized to change the setting.	X	X	X
Pruning Value	Specifies the value for the selected recording pruning strategy as either **0** for *No Pruning* or one of the following values: • For the *Time Based* strategy, the number of days to retain recordings. Recordings made prior to the specified number of days are removed. • For the *Agent Minutes* strategy, the maximum number of minutes of recordings per agent. When the maximum number of minutes is reached, the oldest recordings are removed to make room for new recordings. • For the *Storage Based* strategy, the limit on the total recording size in megabytes. When the limit is reached the oldest recordings beyond the specified storage value are removed.		X	X
Analytics Enabled	If set to **Yes**, the Customer Engagement Analyzer, Analyzer Data Exchange, and Business Rules modules are enabled for your enterprise.		X	X

Other Permissions

Note: Recently created tenants will not see this tab.

The Other Permissions tab displays the settings described in the following table. The **Tenant** column indicates settings that can be specified by authorized users at your enterprise. To edit settings, click the **Edit** button at the bottom of the page.

The **SP** column identifies settings the service provider administrator specifies. The **CJP** column identifies settings specified by the CJP administrator.

Setting	Description	Tenant	SP	CJP
SAM CDX Data Compression	Select **Yes** for a tenant with more than 300 agents.			X
SAM IDX Data Compression	Select **Yes** for a tenant with more than 300 agents.			X
SAM Data Compression Type	If a SAM data compression field is set to *Yes*, select **gzip** from the drop-down list. Otherwise, leave this field set to **none**. Do not select **zip**. This setting is not applicable.			X
Number of CAD Variables	The maximum number of active call-associated data (CAD) variables that can be defined for your enterprise (see "Call-Associated Data Variables" on page 96).		X	X

Setting	**Description**	Tenant	SP	CJP
Maximum Address Books	The maximum number of address books that can be defined for your enterprise (see “Address Books” on page 81).		X	X
Maximum Provisioned Agents.	The maximum number of agents that can be defined for your enterprise. This value must be less than the value specified for Maximum Provisioned Users.		X	X
Maximum Entry Points and Queues	The maximum number of entry points and queues that can be defined for your enterprise.		X	X
External ID	Applies only to CJP Salesforce Edition.			X
Permit Alert	If set to **Yes**, the Supervisory Alert feature is enabled for your enterprise (see Responding to Supervisory Alerts from Agents).		X	X
Last Agent Routing	If set to **Yes**, Last agent Routing is enabled for your enterprise.	X	X	X
Enabled Leg Recordings	If set to **Yes**, three files are created for each recorded call: one with audio of both the caller and the agent, one with just the caller audio, and one with just the agent audio. Currently, this is a custom setting.	X	X	X
Site Level DN Enabled	If set to **Yes**, the DN to Entry Point Mappings interface provides controls for creating mappings at the site level as well as the tenant level (see “DN to Entry Point Mapping” beginning on page page 60).		X	X
Multiple Time Zone Enabled	If set to **Yes**, entry points and queues can be associated with time zones. Time values in routing strategies will be based on the time zone provisioned for the entry point or queue or, if no time zone is specified, the time zone provisioned for your enterprise.	X	X	X
Lock Users Allowed	If set to **Yes**, the Account Unlock module is enabled for your enterprise (see “Unlocking Locked Agent Accounts” on page 37).	X	X	X
Allow Agent Access to Recordings	If set to **Yes**, agents whose profiles permit access to recordings can access recordings of calls they handled within the past 24 hours (see “Agent Viewable Statistics Settings” on page 94).	X	X	X

Publishing Settings

Note: Recently created tenants will not see this tab.

The Publishing Settings tab displays the statistics aggregation manager (SAM) topics that are used for custom reporting. If your enterprise uses custom reporting based on any of these, a **Yes** setting should be specified for the corresponding topics. These settings are specified by CJP Operations.

- Publish Call Events
- Publish Agent Events
- Publish Agent Command Events
- Publish Queued Values
- Publish Dynamic Queued Values
- Publish Agent Detailed Values

SIP

The SIP tab displays the DN range assigned to one or more SIP trunks associated with your enterprise. These settings can be specified by the service provider administrator and the CJP administrator.

Entry Points and Queues

Entry points and queues are types of *virtual teams*. A virtual team can be thought of as a "holding place" for incoming customer calls.

- An entry point is the initial landing place for customer calls on the CJP system. One or more toll-free or dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point.

  The entry points that are used in the CJP Scorecard Routing environment are referred to as *cross-ACD entry points*. Calls that arrive at a cross-ACD entry point can be routed to queues on external ACDs.

- A queue is where calls are kept while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

  An inbound queue that represents a third-party ACD is known as a *proxy queue*. Calls that are sent to an external ACD are distributed to agents by the external ACD. Proxy queues are used by CJP to track the call activity occurring on the external ACD queues. There are two types of proxy queues: dedicated and shared. Agents signed in to a dedicated proxy queue serve only the CJP customer; agents signed in to a shared queue serve multiple customers.

Two additional virtual team types are provisioned for tenants of the standard CJP service that use the outdial feature: outdial entry point and outdial queue.

Each entry point and queue type is represented by a unique icon:

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

Topics covered in this section:

- Entry Point/Queue Groups
- Adding an Entry Point or Queue
- Viewing or Editing an Entry Point or Queue
- Deleting an Entry Point or Queue

Entry Point/Queue Groups

The Entry Point/Queue Group page provides an interface for creating group names for use with the optional Map View and Billing Report features. After you add an Entry Point/Queue group, the group name becomes available for selection in the settings available when you add or edit an entry point or queue.

To view, add, edit, or delete an Entry Point/Queue group:

1. On the CJP Portal navigation bar, select **Provisioning** > **Entry Points/Queue Group**.
2. On the Entry Point/Queue Group List page, one of the following:
   - To add a new group, select the **New EntryPoint/Queue Group**. button.
   - To edit an existing entry point/queue group, click the ▪▪▪ button to the left of a listed group and select **Edit**.
   - To delete an entry point/queue group, click the ▪▪▪ button to the left of a listed group and select **Delete**. Then, in the confirmation dialog box, click **OK**.
3. If you are adding or editing an entry point/queue group, specify or change the settings for the group as described in the following table, and then click **Save**.

Setting	Description
Name	Enter the name of the group.
Type	Select the group type: • **Billing.** The group name will be added to the *Billing Group* drop-down list in the settings for entry points and queues. • **Map.** The group name will be added to the *Map Group* drop-down list in the settings for entry points and queues.

Adding an Entry Point or Queue

If authorized by your user profile, you can add an entry point or queue. After you add a queue, it can be used immediately. However, newly added entry points require additional provisioning steps before they can be used:

- An inbound entry point becomes usable only after dial numbers have been mapped to it as described in “DN to Entry Point Mapping” on page 60.
- An outdial entry point cannot be used until additional provisioning steps are performed by CJP Operations.

To add an entry point or queue:

1. On the CJP Portal navigation bar, select **Provisioning** > **Entry Points/Queues** and then select one of the following links: **Entry Point**, **Queue**, **Outdial Entry Point** or **Outdial Queue**.

   The page for the type of entry point or queue you selected appears, displaying a list of existing entry points or queues.

2. Do one of the following:

   - To add a new entry point or queue, select the **New** button (labeled either **New Entry Point**, **New Queue**, **New Outdial Entry Point**, or **New Outdial Queue**).

   - To copy an existing entry point or queue, click the ▪▪▪ button to the left of a listed entry point or queue and select **Copy**.

3. On the Add or Copy page that appears, specify settings for the entry point or queue as described in the following table, and then click **Save**.

Setting	Description
General Settings	
Name	Enter or change the name for the entry point or queue.
Description	Optionally, enter a short description of the entry point or queue function.
Type	This read-only field displays whether the settings are for an entry point, queue, outdial entry point, or outdial queue.
Outdial Primary DID URL	If the type is outdial entry point, this field specifies the full path name of the DID .xml file that supports outbound dialing. This setting can be specified only by CJP Operations.
Outdial Backup DID URL	If the type is outdial entry point, this field specifies the full path name of the backup DID .xml file. This setting can be specified only by CJP Operations.
Check Agent Availability	Visible only if this is an inbound queue. Select **Yes** or **No** to specify whether or not teams with no logged in agents can be excluded for consideration as the routing strategy escalates over time. If the *Check Agent Availability* field in the Tenant settings is set to Yes, a No setting here is ignored (see "Tenant Settings" on page 44).
Channel Type	Select the channel type: **Telephony**, **Email**, or **Chat**. Other channel types (Fax, Video, and Others) are reserved for future use. For outdial entry points and queues, this is a read-only field displaying "Telephony" as the channel type.

Setting	Description
Status	Displayed on the View and Edit pages for all entry points and queues to specify whether the entry point or queue is Active or not Not Active.
Advanced Settings	
Permit Monitoring	Select **Yes** or **No** to specify whether or not calls on this queue can be monitored.
Permit Parking	Select **Yes** or **No** to specify whether or not calls can be queued.
Permit Recording	Select **Yes** or **No** to specify whether or not calls can be recorded. If the *Record All Calls* field in the Tenant settings is set to Yes, a No setting here is ignored (see "Other Permissions" beginning on page 49).
Record All Calls	Visible only if this is an inbound or outdial queue. This setting is enabled only if *Permit Recording* is set to **Yes**. Specify **Yes** or **No** to indicate whether or not all calls for this queue will be recorded. If the *Record All Calls* field in the Tenant settings is set to **Yes**, this setting is not available (see "Other Permissions" beginning on page 49).
Pause/Resume Enabled	Select **Yes** or **No** to specify whether or not agents can click the Privacy Shield button during a call to pause and resume potential call recording. For example, the agent might need to pause call recording while obtaining a credit card number or other protected information. If the *Pause/Resume Enabled* field in the Tenant settings is set to Yes, a No setting here is ignored (see "Tenant Settings" on page 44). **Note:** The Privacy Shield button is displayed on the Agent Desktop only if the Privacy Shield feature is enabled in your CJP service configuration.
Recording Pause Duration	If *Pause/Resume Enabled* is set to *Yes*, this field specifies how many seconds call recording will be paused if the agent does not click the *Turn Off Privacy Shield* button earlier.
Service Level Threshold	Specify the maximum length of time, in seconds, that a customer call can be in queue before being flagged as outside service level. If a call is completed within this time interval, it is considered to have been handled within service level.
Maximum Active Calls	Specify the maximum number of simultaneous calls allowed for this entry point or queue. Additional calls terminating on the number associated with this queue will be blocked (that is, a busy signal will be played).
Control Script URL	The system automatically populates this field with the URL for this entry point or queue's default control script, to be used if the control script is not provided through the CJP Routing Strategy module.

Setting	Description
IVR Requeue URL	Not currently used.
Maximum Time in Queue	Specify the length of time, in seconds, after which a queued call will be distributed to the overflow number provisioned for this queue. The value entered here is the default value that appears in the *Maximum Time in Queue* field in a routing strategy for this queue. If a different value is entered in the routing strategy, that value will be used instead of this one. For an email queue, specify a very high value to avoid overflow.
Overflow Number	Enter the destination number to which calls are distributed when they exceed the *Maximum Time in Queue* setting specified in the routing strategy for this queue. Valid entry is 11 digits—for example, 14155551234.
Vendor ID	If this is a proxy queue, or if this is an entry point or queue used for a media type other than telephony, enter the unique alphanumeric string that maps this queue to the vendor.
Time Zone (Routing Strategies Only)	If the Multiple Time Zone feature is enabled for your enterprise, optionally specify the time zone of the entry point or queue. Time values in routing strategies are based on the time zone provisioned for the entry point or queue or, if no time zone is specified, the time zone provisioned for your enterprise (typically headquarters).
DN List	
IVR DN List	Visible only if this is an entry point. If this entry point will be integrated with an external IVR, enter the DN pool list numbers.
DN	This setting is displayed only when you view or edit an inbound entry point. • If no DNs are mapped, *Not Mapped* is displayed. To add mapping, see “DN to Entry Point Mapping” on page 60. • If DNs have been mapped to the entry point, you can click the button to display a list of the mapped DNs.
Scorecard Routing Settings	
CJP Queues Only	Visible only if this is an inbound entry point. • If **Yes**, call that arrive at this entry point will be routed only to CJP queues. • If **No**, calls will be routed to proxy queues that represent third-party ACDs and may also be routed to CJP queues.

Setting	Description
CJP Queue	Visible only if this is an inbound queue. Select **No** if this is a proxy queue.
ACD Type	Visible only if this is a proxy queue. Select the type of ACD system from the drop-down list.
ACD Description	Visible only if this is a proxy queue. Optionally enter a description of the ACD.
Upload DNIS Pool File	Visible only if this is a proxy queue, this field lets you upload the .csv file containing the DNIS pool used to negotiate call delivery to the third-party ACD. To do so: 1. Create a .csv file consisting of new-line separated entries. Each line can have either a DNIS number or a range. The separator for a range is ... (three dots). 2. Save the file to your system. 3. To specify the path to the .csv file in this field, click the **Browse** button, then navigate to the file and select it. When viewing or editing the queue (as described in "Viewing or Editing an Entry Point or Queue" on page 58), you can click the button to display a list of DN entries for this queue in a pop-up window. When you view the queue, this setting is labeled **DNIS Pool Data**.
DNIS Timeout (seconds)	Visible only if this is a proxy queue. If, after the time interval specified here, a Connect message has not been received from the third-party ACD, it will be assumed that the call did not get connected and the DNIS will be released so that it can be reused. Minimum value is 15 seconds.
Maximum DNIS Retries	Visible only if this is a proxy queue. Enter the maximum number of times the system should attempt to route a call to this queue before the call is rerouted to the entry point.
Primary Ping URL	Visible only if this is a proxy queue. Enter the URL provided by the third-party outsourcer to determine the accuracy of the data from the proxy queue.
Backup Ping URL	This setting is reserved for future use.
Latitude Longitude	These settings are reserved for future use.
Dedicated	Visible only if this is a proxy queue. • If **Yes**, agents signed in to this queue are serving only the CJP customer. • If **No**, agents signed in to this queue are serving more than one customer.
Label	This setting is reserved for future use.

Setting	Description
Metrics Data Precedence	Visible only if this is a proxy queue. Move all the listed data sources from the **Available** list to the **Selected** list in the order in which you want the system to look for metrics data to use in the routing decision. All three data sources must be moved to the **Selected** list. • **Vendor.** Metrics periodically posted by the vendor. • **Realtime.** Real-time metrics computed and tracked by the CJP service. • **Historical.** The CJP service periodically loads six-week rolling historical data from the call data processor database. This data is computed and stored by each minute.
Block Area Codes	Visible only if this is a proxy queue. Select **Yes** or **No** to specify whether or not to block the routing of calls to this queue from a set of specified area codes. If you selected **Yes**, click the button to display the **Choose Area Codes** settings, and then specify the area codes to block (see "Specifying Area Codes to Block" on page 68).
Associated Queues	
Visible only when you view or edit an entry point, this read-only section displays the names of all queues that are associated with the entry point in a routing strategy.	

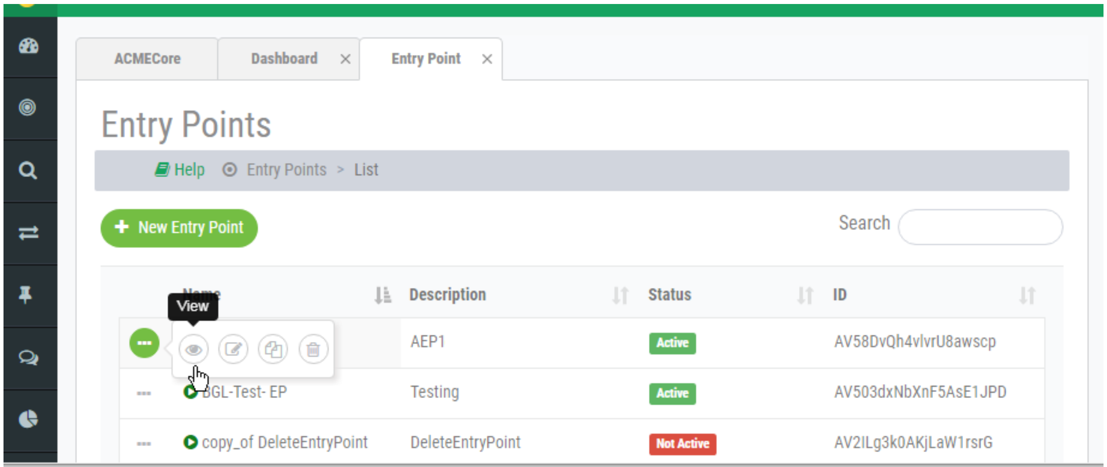
4. A new inbound entry point cannot be used until DNs have been mapped to it as described in "DN to Entry Point Mapping" on page 60.

   A new outdial entry point requires intervention by CJP Operations to complete additional provisioning steps.

Viewing or Editing an Entry Point or Queue

To view or edit an entry point or queue:

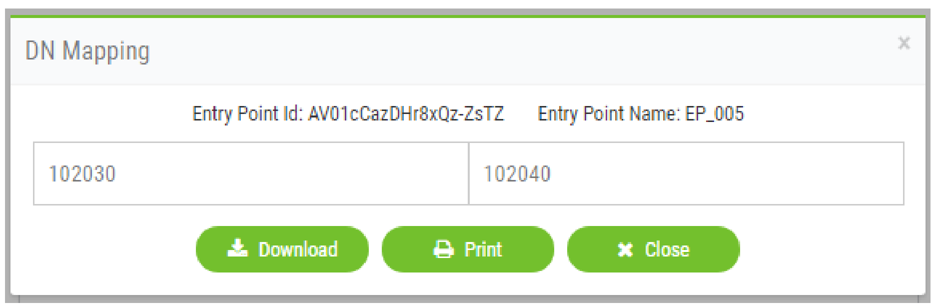
1. On the CJP Portal navigation bar, select **Provisioning** > **Entry Points/Queues** and then select one of the following links: **Entry Point**, **Queue**, **Outdial Entry Point** or **Outdial Queue**.
2. Click the ••• button to the left of a listed entry point or queue and select **View** or **Edit**.



The page displays settings for the selected entry point or queue. For a description of each setting, see the settings table beginning on page 54.

3. If DNs have been mapped to the entry point, you can click the button in the **DN** field to open a pop-up window displaying the list of mapped DNs.

   Click one of the buttons at the bottom of the pop-up window to print the list or download as a .csv file.



4. If you are viewing a proxy queue, you can click the button in the **DNIS Pool Data** field to open a pop-up window displaying the list of DNIS entries for the queue. You can click a button bottom of the pop-up window to print the list or download the data as a .csv file.

5. If you are editing a proxy queue configured to use the blocked area codes feature, you can click the button to edit the list of blocked area codes (see "Specifying Area Codes to Block" on page 68 for more information).

Deleting an Entry Point or Queue

Before attempting to delete an entry point or queue, be aware of the following:

- An entry point or queue cannot be deleted if it is associated with or referenced by any other entity.
- The deleted entry point or queue continues to be visible in historical reports and on the list page for Entry Points or Queues.
- On the list page, the deleted entry point or queue is shown with the status *Not Active*.

To delete an entry point or queue:

1. On the CJP Portal navigation bar, select **Provisioning** > **Entry Points/Queues** and then select one of the following links: **Entry Point**, **Queue**, **Outdial Entry Point** or **Outdial Queue**.

   The page for the type of entry point or queue you selected appears, displaying a list of existing entry points or queues.

2. Click the ▪▪▪ button to the left of a listed entry point or queue and select **Delete** .

   If the entry point or queue is referenced by other entities, a message informs you that it cannot be deleted. Click the information icon at the end of the message to display a list of associated entities.

DN to Entry Point Mapping

Each DN (ingress toll-free or DID number) that arrives at an entry point in the CJP system must be mapped to the entry point before the entry point can be used.

The DN Mappings page provides an interface for adding, editing, and viewing the mappings between DNs and entry points as described in the following topics:

- Adding, Editing, and Deleting DN Mappings Individually
- Using Bulk Upload to Add or Remove DN Mappings

Adding, Editing, and Deleting DN Mappings Individually

Note: Changes take effect after the system has automatically synchronized the associated files, which occurs at hourly intervals.

To add, edit, or delete DN mappings individually:

1. On the CJP Portal navigation bar, select **Provisioning** > **DN to Entry Point Mappings**.

   The DN to Entry Point Mappings List page appears, displaying a list of all DNs.

2. To filter the list, do one of the following:
   - From the **Select Entry Point** drop-down list, select an entry point or select **Not Mapped** to display a list of DNs that are not currently mapped to an entry point.
   - If Site Level DN is enabled for your enterprise, select a site from the **Select Site** drop-down list.
   - Enter one or more characters in the **Search** field.

3. To delete a mapping, click the ▪▪▪ button to the left of a listed mapping and select **Delete**.

4. To add a new mapping, click the **Add New DN to EP Mapping** button.

   - OR -

   To edit a mapping, click the ▪▪▪ button to the left of a listed mapping and select **Edit**.

5. If you are adding or editing a mapping, specify or change the settings on the page that appears, and then click **Save**. Settings are described in the following table.

Setting	Description
DN	Enter the ingress toll-free or DID number. The format must match whatever will be received from the inbound carrier, which is typically numbers only—no spaces or other characters.
File Location	If Site Level DN is enabled for your enterprise: • Select a button to specify whether you want the mapping file to be located at the **Tenant Level** or **Site Level**. • If you selected *Site Level*, select a site from the **Site** drop-down list.
Entry Point	Select the entry point to which you want to map the DN. If the entry point has not yet been created, select **None**. Then you can map the DN to an entry point later.

6. To export the DNs and their related entry points as a .csv file, click the **Export as CSV** button on the upper right side of the page.

Using Bulk Upload to Add or Remove DN Mappings

To add or remove multiple DN mappings simultaneously:

1. Create a .csv file consisting of new-line separated entries. Each line must include a comma-separated DN number, entry point ID pair. For example:

   8005551234,AVx90dWsbxpvzWSp3TSo
   8005552345,AVx9qUofbxpvzWSp3TST

2. Save the .csv file to your system.
3. Select **Provisioning** > **DN to Entry Point Mappings** on the Portal navigation bar.
4. Click the **Bulk Upload** button on the upper right side of the DN to Entry Point Mapping page to display the bulk upload settings.
5. Specify the settings as described in the following table and then click **Upload**.

Setting	Description
Operation	Select a button to specify whether you want to add a new DN mapping or remove an existing mapping.
File Location	If Site Level DN is enabled for your enterprise: • Select a button to specify whether you want the mapping file to be located at the **Tenant Level** or **Site Level**. • If you selected *Site Level*, select a site from the **Site** drop-down list.
Upload File	Click the **Browse** button, then navigate to the .csv file and select it.

Multimedia Profiles

The optional Multimedia feature enables the CJP system to route email, fax, and chat contacts.

If Multimedia is enabled for your enterprise, each agent is associated with a multimedia profile, which specifies how many of each media type the agent can handle concurrently.

Multimedia profiles can be assigned to sites, teams, and individual agents. By default, the *Default_Telephony_Profile* is assigned to every site. This profile cannot be edited or deleted, but you can assign a different profile to a site.

Each agent-based team at a given site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team's profile unless the agent is assigned a different multimedia profile.

To view, add, edit, or delete multimedia profile:

1. On the CJP Portal navigation bar, select **Provisioning** > **Multimedia Profiles**.

   The Multimedia Profiles page appears, displaying a list of profiles. Note that the *Default_Telephony_Profile* cannot be edited or deleted.

2. To delete a profile, click the ▪▪▪ button to the left of a listed profile and select **Delete** 🗑. You cannot delete a profile that is assigned to a site, team, or agent.

3. To add a profile, click **New Multimedia Profile**.

   - OR -

   To view or edit a profile, click the ▪▪▪ button to the left of a listed profile and select **View** 👁 or **Edit** 📝.

4. If you are adding or editing a profile, specify or change the settings on the page that appears, and then click **Save**. Settings are described in the following table.

Setting	Description
Profile Details	
Name	Enter a name for the multimedia profile.
Description	Optionally, enter a description of the profile.
Allow agents to simultaneously handle multiple realtime interactions	If set to **Yes**, multiple realtime contacts can be routed to the agent at the same time. If set to **No**, only one realtime contact can be routed to the agent at a time. For example, the agent cannot receive a chat contact while handling a voice contact.
Status	Displayed on the View and Edit pages to specify whether the profile is Active or Not Active.

Setting	Description
Media Details	
Voice	For each media type, specify the number of concurrent contacts of that type an agent can handle or specify **0** if no contacts of that type can be sent to the agent. Currently, only email, chat, and telephony media types are available. For Voice, you can specify only **0** or **1**. The maximum number of media channels is determined by the *Maximum Channels Per Profile* provisioned on the Module Permissions page of the tenant settings for your enterprise (see "Tenant Settings" on page 44).
Email	
Fax	
Chat	
Video	
Others	

Multimedia Enabler

If *Multimedia Extensions Enabled* is true for your enterprise, the Multimedia Enabler page provides access to settings for the multimedia enabler.

To add or delete a multimedia enabler or to view, copy, or edit the settings for an enabler:

1. On the CJP Portal navigation bar, select **Provisioning** > **Multimedia Enabler**.
2. On the Multimedia Enabler page, do one of the following:
    - To add an enabler, click **New Multimedia Enabler**.
    - To view, copy or edit the settings for an enabler, click the button to the left of a listed enabler and select **View**, **Copy** or **Edit**.
    - To delete an enabler, click the button to the left of a listed enabler and select **Delete**. Then, in the confirmation dialog box, click **OK**.
3. If you are adding, copying, or editing a multimedia enabler, specify or change the settings as described in the following table, and then click **Save**.

Setting	Description
General Settings	
Name	Enter a name for the multimedia enabler.
Description	Optionally, enter a description of the multimedia enabler.
Channel Type	Select the channel type from the drop-down list: Email or Chat. Other channel types (Fax, Video, and Others) are reserved for future use.

Setting	Description
Status	Displayed on the View and Edit pages to specify whether the multimedia enabler is Active or Not Active.
Media Details	
Agent URL	Enter the URL for access to the real-time monitoring module provided by the multimedia enabler.
Agent Display Label	Enter a label for the link on the portal navigation bar that will provide access to the monitoring module provided by the multimedia enabler.
Provisioning URL	Enter the URL for access to the provisioning module provided by the multimedia enabler.
Display Label	Enter a label for the link on the portal navigation bar that will provide access to the provisioning module provided by the multimedia enabler.
Report URL	Enter the URL for access to the multimedia report module provided by the multimedia enabler.
Report Display Label	Enter a label for the link on the portal navigation bar that will provide access to the multimedia report module provided by the multimedia enabler.

Multimedia Extensions

If your enterprise uses the Multimedia feature and Multimedia Extensions are enabled for your enterprise, agents can be associated with a multimedia extension, which identifies the enabling module for each media type the agent can handle.

Multimedia extensions can be assigned to sites and individual agents. Each agent at a given site is associated with the multimedia extension assigned to that site unless the agent is assigned a different multimedia extension.

To view, add, edit, or delete a multimedia extension:

1. On the CJP Portal navigation bar, select **Provisioning** > **Multimedia Extension**.

   The Multimedia Extension page appears, displaying a list of entries.

2. To delete an extension, click the ▪▪▪ button to the left of a listed multimedia extension and select **Delete** 🗑. You cannot delete a multimedia extension that is assigned to a site or agent.

3. To add a multimedia extension, click **New Multimedia Extension**.

   \- OR -

   To edit a multimedia extension, click the ▪▪▪ button to the left of a listed extension and select **Edit**.

4. If you are adding or editing a multimedia extension, specify or change the settings on the page that appears, and then click **Save**. Settings are described in the following table.

Setting	Description
General Settings	
Name	Enter a name for the multimedia extension.
Description	Optionally, enter a description of the multimedia extension.
CAS Enabled	This field reserved for future use.
Status	Displayed on the List and Edit pages to specify whether the multimedia extension is **Active** or not **Not Active**.
Multimedia Extension Details	
Multimedia Profile	From the drop-down list, select a multimedia profile that does not include telephony. After you select a multimedia profile, a new setting appears for each channel type included in the profile.
Multimedia Enabler	Select a multimedia enabler from the drop-down list for each channel type included in the selected multimedia profile.

Sites

A site is a physical contact center location under the control of your enterprise. For example, an enterprise named *Acme* might have sites in Chicago, Manila, and Bangalore with agents to handle calls.

Note: When you add a site, the system automatically adds a team to the new site. You can change the team name and other settings if you want to use this team, but you cannot change the team type from Capacity Based to Agent Based. Do not delete the team without first adding a different team for the new site.

Before attempting to delete a site, be aware of the following:

- A site cannot be deleted if any active teams or any active or suspended agents are associated with it.
- The deleted site continues to be visible in historical reports and on the Sites list page.
- On the Sites list page, the deleted site is shown with the status *Not Active*.

To view, add, edit, or delete a site:

1. On the CJP Portal navigation bar, select **Provisioning** > **Sites**.
2. On the Sites List page:
   - To add a site, click **New Site**.
   - To view or edit the settings for a site, click the ▪▪▪ button to the left of a listed site and select **View** or **Edit**.
   - To delete a site, click the ▪▪▪ button to the left of a listed site and select **Delete**. Then, in the confirmation dialog box, click **OK**.

     If the site is referenced by other entities, a message informs you that the site cannot be deleted. Click the information icon at the end of the message to display a list of associated entities.
3. If you are adding or editing a site, specify or change the settings on the page that appears, and then click **Save**. Settings are described in the following table.

Setting	Description
General Settings	
Name	Enter the name of the site (for example, *Chicago*).
Latitude * Longitude *	Reserved for future use.
Advanced Settings	
Status	Select an option to specify whether the site is **Active** or **Not Active**.
Multimedia Profile	If Multimedia is enabled for your enterprise, optionally select a multimedia profile for this site or leave the default setting, *Default_Telephony_Profile* (see "Multimedia Profiles" on page 62 for more information).
Multimedia Extension	If Multimedia Extensions are enabled for your enterprise, optionally select a multimedia extension for this site. The list of multimedia extensions is populated based on the multimedia profile assigned to the site. (See "Multimedia Extensions" on page 65 for more information.)
Block Area Codes	Select **Yes** or **No** to specify whether or not to block the routing of calls to this site from a set of specified area codes. If you selected **Yes**, click the button to display the **Choose Area Codes** settings, and then specify the area codes to block (see "Specifying Area Codes to Block" on page 68).

Specifying Area Codes to Block

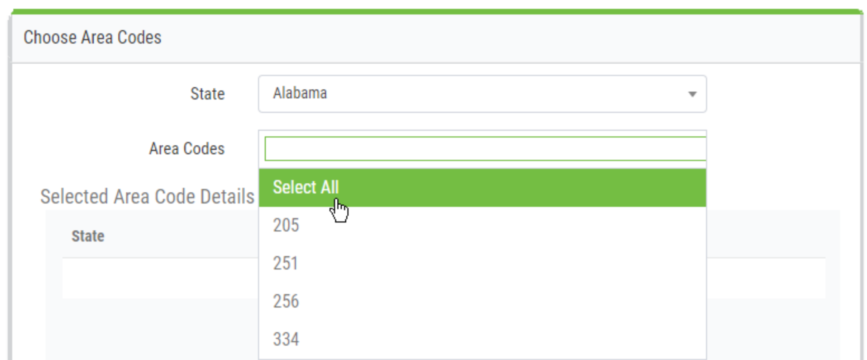
If the *Block Area Code* setting for a site or proxy queue is set to **Yes** you can specify the area codes to block for the site or proxy queue as follows:

1. While adding or editing a site or proxy queue, click the button to display the **Choose Area Codes** settings.

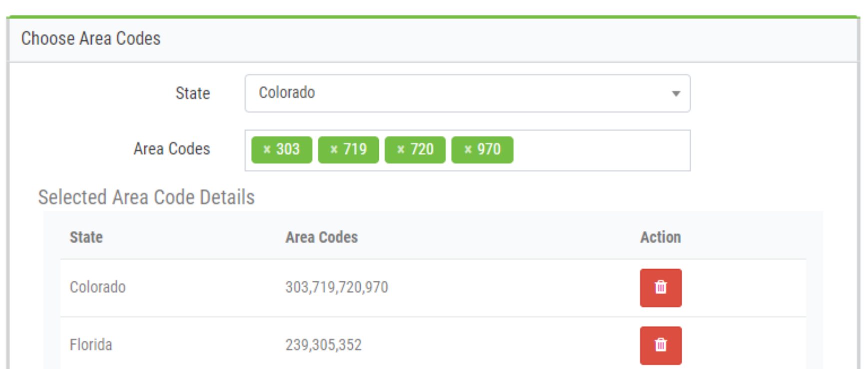
   For more information, see:

   - "Sites" beginning on page 66
   - "Adding an Entry Point or Queue" beginning on page 53
   - "Viewing or Editing an Entry Point or Queue" beginning on page 58

2. Select a state from the **State** drop-down list.
3. Select one or more area codes from the **Area Codes** drop-down list. To select multiple area codes using the keyboard, hold down the Shift key and press the Down Arrow key.



4. Repeat steps 2 and 3 until you have selected all the area codes you want to block.
5. To remove an area code, select the relevant state from the **State** drop-down list and then either click the **x** to the left of the area code listed in the Area Codes field or, to delete all selected area codes for a state, click the Delete button to the right of the listed area codes in the **Selected Area Code Details** table.



6. When you are finished, click **Save** to save the list of area codes to block.

Skill Definitions

Skills-based routing is an optional CJP feature that enables you to assign skill requirements, such as language fluency or product expertise, to incoming calls so they can be distributed to agents with a matching set of skills.

The Skill Definitions page provides an interface for viewing, creating, and editing the skills that can be assigned to calls and to skill profiles, which can then be assigned to teams or individual agents (for more information, see “About Skills-Based Routing” on page 115 and “Skill Profiles” on page 71).

The maximum number of active skills that you can create is determined by the *Maximum Skills* and *Maximum Text Skills* values provisioned for your enterprise (see “Tenant Settings” on page 44 beginning on page 44).

To create, view, or edit skill definitions:

1. On the Portal navigation bar, select **Provisioning > Skills > Skill Definition**.
2. On the Skill Definitions page:
   - To add a new skill definition, click **New Skill Definition**.
   - To edit a skill definition, click the button to the left of a listed skill and select **Edit**.
3. Specify or change the settings for the skill as described in the following table, and then click **Save**.

Setting	Description
Name	Enter a name for the skill.
Description	Optionally, enter a description of the skill.
Service Level Threshold	Specify how many seconds a customer call can be in queue for this skill before being flagged as outside service level. If a call is completed within this time interval, it is considered to have been handled within service level for this skill.

Setting	Description
Type	If you are creating a new skill, specify the skill type (you cannot change the skill type): • **proficiency.** Can have a value ranging from 0 to 10 that represents the agent's level of expertise in the skill. For example, you might define a skill for each language that your agents speak. • **boolean.** Can have the value of True or False to indicate whether or not the agent has the skill. For example, you might define a skill named *PremierService* to ensure that your most valuable customers get the best service. Your most experienced agents can be assigned a value of True, and your least experienced agents can be assigned a value of False • **text.** A free-form text skill that must be matched exactly. For example, you might define a skill named *Extension* that will let you route a call to a specific agent's extension number based on digits entered by the caller in response to a prompt. The text value can include up to 40 characters, including spaces. • **enum.** A named set of predefined values. For example, a skill named *Line of Business* might have a set of three values: *Sales*, *Service*, and *Billing*.Each value can include up to 20 characters, including spaces.
List Values	If the skill type is *enum*, specify the values that can be associated with this skill. For example, for an enum skill named *Operating System*, you might define three values: *Windows*, *Linux*, and *Unix*. Each value is limited to a maximum length of 20 characters, including spaces. • To add a value, type the value name in the **List Value** field and then press Enter. Repeat for each value you want to add. • To delete a value, click the **x on the left side of the value entry**.
Status	Select **Active** or **Not Active**. A skill cannot be made inactive if it is used in a skill profile or a routing strategy.

Skill Profiles

A skill profile is a set of skills, each with an assigned value, that can be assigned to an agent-based team or to an individual agent. For example, a skill of English might be assigned a high level of proficiency in one skill profile and a lower level in another profile.

If a skill profile is assigned to a team, all agents logged in to that team are associated with that skill profile unless the agent is assigned a specific skill profile.

To create, copy, or edit a skill profile:

1. On the CJP Portal navigation bar, select **Provisioning > Skills > Skill Profiles**.
2. On the Skill Profiles page:
   - To add a skill profile, click **New Skill Profile**.
   - To copy or edit the settings for a skill profile, click the ▪▪▪ button to the left of a listed skill profile and select **Copy** or **Edit**.
3. Enter or change the name and optional description of the skill profile on the Add, Copy, or Edit page.
4. Select or clear the check box to the left the name of each skill you want to add to or remove from the skill profile, and specify the value of each selected skill as described in the following table.

For this skill type	Do this to specify the skill value
proficiency	Drag the slider to a number between 0 and 10 to indicate how proficient the agent is in this skill.
boolean	Click one of the radio buttons to specify whether the agent has this skill (**True**) or does not have the skill (**False**).
text	Enter a maximum of 40 characters (including spaces).
enum	Select the check box next to each list value that represents a skill the agent has.

5. Click **Save** to save the skill profile.

Business Metrics

If your enterprise subscribes to CJP Scorecard Routing, you can add business metrics for use in call routing decisions (see "About CJP Scorecard Routing" on page 117).

To view, add, edit, or delete a business metric:

1. On the CJP Portal navigation bar, select **Provisioning > Business Metrics**.
2. On the Business Metrics page:
   - To delete a business metric, click the ••• button to the left of a listed metric and select **Delete**. Then, in the confirmation dialog box, click **OK**.
   - To add a business metric, click **New Business Metric**.
   - To edit the settings for a business metric, click the ••• button to the left of a listed metric and select **Edit**.
3. In the dialog box, specify or change the settings for the business metric you are adding or editing as described in the following table, and then click **Save**.

Note: You cannot edit the variable type of a business metric that is referenced in a routing strategy.

Setting	Description
Name	Enter the name of the business metric.
Variable Type	Select a value from the drop-down list: • **Direct Variable**. The variable's impact on the routing decision increases as the value of the variable increases; for example, Conversion Rate. • **Inverse Variable**. The variable's impact on the routing decision decreases as the value of the variable increases; for example, Cost.
Status	If you are editing a business metric, select **Active** or **Not Active**.

Teams

A team is a group of people who support a specific group of functions; for example, *Gold Customer Service* or *Billing*. A team is associated with a specific site.

Before attempting to delete a team, be aware of the following:

- A team cannot be deleted if it is used in a strategy, or if a skill profile or multimedia profile is assigned to it, or if any active or deleted agents are assigned to it, unless the agents have been permanently removed from the system.
- The deleted team continues to be visible in historical reports.
- The deleted team also continues to be visible on the Teams list, where it is displayed with the *Not Active* status.

To view, add, edit, or delete a team:

1. On the CJP Portal navigation bar, select **Provisioning** > **Teams**.
2. On the Teams page:
   - To add a team, click **New Team**.
   - To view or edit the settings for a team, click the ▪▪▪ button to the left of a listed team and select **View** or **Edit**.
   - To delete a team, click the ▪▪▪ button to the left of a listed team and select **Delete**. Then, in the confirmation dialog box, click **OK**.

     If the team is referenced by other entities, a message informs you that the team cannot be deleted. Click the information icon at the end of the message to display a list of associated entities.
3. If you are adding or editing a team, specify or change the settings for the team on the page that appears, and then click **Save**. Settings are described in the following table.

Setting	Description
General Settings	
Site	If you are adding a new team, select the site. You cannot change the site after team is created.
Name	Enter a team name, preferably one that indicates the team's function—for example, *Billing* or *Customer Support*.

Setting	Description
Type	Specify the team type: • **Agent Based**. The team has a specific number of agents assigned to it. These agents use the CJP Agent Desktop to interface with the CJP system. • **Capacity Based**. The team does not have specific agents assigned to it, and the agents do not use the CJP Agent Desktop. A capacity-based team might be used to represent a voice mailbox or an agent group that is not managed by the CJP system. The capacity of such teams is determined by the Capacity setting, which can be overwritten by team capacity strategies defined in the Routing Strategy module. For more information, see “About Team Types” on page 167.
Team Status	Select **In Service** (team is available to handle calls) or **Not Available**. You cannot change the team status from *In Service* to *Not Available* if the team is part of a routing strategy.
Status	This setting appears on the Edit page to specify whether the team is Active or Not Active.
Advanced Settings	
DN	This setting is enabled only if *Capacity Based* is specified in the *Team Type* field. Enter the dial number where calls will be distributed for this team.
Priority	Reserved for future use. Enter a “dummy” value here.
Capacity	If *Capacity Based* is specified in the *Team Type* field, specify the maximum number of simultaneous calls that this team can handle. You can specify a maximum of up to 10,000. Calls will be routed to other sites or will be queued after the team capacity has been reached. You can create scheduled team capacity strategies to override this setting in response to changing contact center conditions. If a team capacity strategy is not created for a capacity-based team, the system uses this capacity value. For more information, see “Scheduling Team Capacity” on page 190.
Skill Profile	If your enterprise uses the optional Skills-Based Routing feature, you can optionally select a skill profile for this team (see “Skill Profiles” on page 71 for more information). You cannot assign a skill profile to a capacity-based team.
Multimedia Profile	If Multimedia is enabled for your enterprise, optionally select a multimedia profile for this team (see “Multimedia Profiles” on page 62 for more information).This profile overrides the multimedia profile assigned to the site where this team is located. You cannot assign a multimedia profile to a capacity-based team.
Agents	If this is an agent-based team and agents have already been provisioned, you can assign agents to the team by clicking in this field and selecting them from the drop-down list. (See “Management Portal and Agent User Accounts” on page 104.)

Threshold Rules

If your enterprise uses the Threshold Alerts feature, authorized users can create threshold rules to monitor agent and call data.

When a threshold is breached, an alert is sent to the CJP Real-Time Reports module where it can be viewed, acknowledged, and archived by authorized users (see “Monitoring Threshold Alerts” on page 249). In addition, a threshold rule can specify one or more email addresses to which alert notifications will be sent when a threshold is breached.

A threshold alert can be displayed in the Agent Personal Statistics tab on the Agent Desktop if *Agent Viewable* is set to *Yes* for the threshold rule and the threshold alert is selected in the agent profile assigned to the agent (see “Agent Profiles” on page 88).

Threshold rules can be configured for the call and agent metrics listed in the following table. For each rule, you specify a value that will trigger the alert and one of the following operands:

> greater than
>= greater than or equal to
< less than
<= less than or equal to
= equal to

Metric	Entity Type	Trigger Value Type
Call Metrics		
Abandoned Calls	Queue	Count
Average Queue Time	Queue	Duration
Average Speed of Answer	Queue	Duration
Blind Transferred Calls	Queue	Count
IVR Calls	Entry Point	Count
Longest Time in Queue	Queue	Duration
Number of Calls in Queue	Queue	Count
Overflow Calls	Queue	Count
Service Level Threshold	Queue	Percentage
Short Calls	Entry Point or Queue	Count
Transferred Calls	Queue	Count
Agent Metrics		
Available Agents	Site or Team	Count
Connected Agents	Site or Team	Count
Current Available Time	Agent	Duration
Current Connected Time	Agent	Duration

Metric	Entity Type	Trigger Value Type
Current Hold Time	Agent	Duration
Current Idle Time	Agent	Duration
Current Wrap-up Time	Agent	Duration
IB Average Handle Time	Site or Team	Duration
Idle Agents	Site or Team	Count
Not Responding Agents	Site or Team	Count
Number of Agents in Outdial	Site or Team	Count
Number of Logged in Agents	Site or Team	Count
OB Average Handle Time	Site or Team	Duration
Occupancy	Site or Team	Percentage
Total Available Time	Agent	Duration
Total Idle Time	Agent	Duration

The maximum number of threshold rules that you can create is determined by the *Maximum Threshold Rules* value provisioned for your enterprise (see “Tenant Settings” beginning on page 44).

To view, edit, or create a threshold rule:

1. On the CJP Portal navigation bar, select **Provisioning** > **Threshold Rules**.
2. On the Threshold Rules page:
   - To add a new rule, click **New Threshold Rule**.
   - To view, copy or edit the settings for a threshold rule, click the ▪▪▪ button to the left of a listed rule and select **Copy** or **Edit**.
   - To delete a threshold rule, click the ▪▪▪ button to the left of a listed rule and select **Delete**. Then, in the confirmation dialog box, click **OK**.
3. If you are adding, copying, or editing a threshold rule, specify or change the settings for the rule as described in the following table, and then click **Save**.

Setting	Description
General Settings	
Name	Enter a name for the rule.
Description	Enter a short description of the rule.
Agent Viewable	Select **Yes** or **No** to specify whether an alert can be sent to agents when the threshold rule is breached. If **Yes**, this rule will be available for selection on the *Agent Profiles > Agent Thresholds* page when you create or edit an agent profile (see “Agent Profiles” on page 88).

Setting	Description
Entity Type	Select the entity type that the threshold rule will apply to: Entry Point, Queue, Site, Team, or (if your enterprise uses the Agent Threshold Alerts feature) Agent.
Status	This setting appears on the Edit page to specify whether the threshold is Active or Not Active.
Entity Information	
Metric Type	Specify whether this is an agent threshold or a call threshold.
Entity	Select the entry point, queue, site, or team that the rule will apply to. This setting is not applicable if the entity type is Agent.
Threshold Information	
Threshold Metric	Select a value from the drop-down list. The list displays only those metrics that are applicable to the selected entity type.
Operand	**Operand**. Select a value from the drop-down list: **>** (greater than) **>=** (greater than or equal to) **<** (less than) **<=** (less than or equal to) **=** (equal to)
Trigger Value	Specify the value that will trigger a threshold alert. The value type (duration, count, or percentage) is based on the metric selected. The trigger value must be greater than 0 for all metrics except *Available Agents*, *Connected Agents*, *Number of Agents in Outdial*, and *Number of Logged in Agents*.
Trigger Interval	Specify the interval, in seconds, during which the system will generate only one alert for the threshold rule check.
Email Information	
Notification Receivers	If you want an email alert or text message to be sent to an individual when the threshold is triggered, enter the email address in either the **Notification Receivers** or the **Text Notification Receivers** field, and then press Enter. Repeat for each address you want to add. To remove an address, click the **x** on the left side of the listed address.
Text Notification Receivers	

Work Types

When you create an idle or wrap-up code, you associate it with a work type—a value that can be used to group idle and wrap-up codes in auxiliary reports.

To create or edit a work type:

1. On the CJP Portal navigation bar, select **Provisioning** > **Work Type**.
2. On the Work Types page:
   - To add a work type, click **New Work Type**.
   - To edit the settings for a work type, click the ▪▪▪ button to the left of a listed work type and select **Edit**.
   - To delete a work type, click the ▪▪▪ button to the left of a listed work type and select **Delete**. Then, in the confirmation dialog box, click **OK**.
3. If you are adding or editing a work type, specify or change the settings as described in the following table and then click **Save**.

Setting	Description
Name	Enter a name for the work type.
Description	Optionally, enter a description of the work type.
Status	This setting appears on the Edit page to specify whether the work type is Active or Not Active. If the work type is **Not Active**, it cannot be assigned to an auxiliary code.
Type	Select either **Idle Code** or **Wrap Up Code** to specify the type of auxiliary code this work type can be associated with.

Idle and Wrap-up Codes

Idle and wrap-up codes are selected by agents when they are logged in to the CJP Agent Desktop.

- Idle codes typically indicate why an agent is not available to take calls, such as a lunch break or meeting.
- Wrap-up codes indicate the result of the call—for example, a sale was made or a call was escalated.

Each idle and wrap-up code is associated with a work type—a value that can be used to to group idle and wrap-up codes in auxiliary reports (see "Work Types" on page 78).

You make idle and wrap-up codes available to agents by adding them to an agent profile and then assigning the agent profile to the agents. At least one idle code and one wrap-up code must be included in an agent profile. (For more information, see "Agent Profiles" on page 88.)

Note: If your enterprise uses the outdial feature, it is recommended that you create a wrap-up code such as "Outdial Failed" that agents can enter when they are placed in the Wrap Up state after initiating an outdial call that fails to be connected.

To create an idle or wrap-up code or to edit or delete a wrap-up or idle code that has been created for your enterprise:

1. On the CJP Portal navigation bar, select **Provisioning** > **Auxiliary Codes**.

   The Auxiliary Codes page appears, displaying the list of idle codes for your enterprise.

2. To display a list of wrap-up codes, select the **Wrap Up Codes** button at the top of the page.

3. On the Idle Codes or Wrap Up Codes List page:

   - To add a new code, click **New Idle Code** or **New Wrap Up Code**.
   - To edit the settings for a code, click the ▪▪▪ button to the left of a listed code and select **Edit**.
   - To delete a code, click the ▪▪▪ button to the left of a listed code and select **Delete**. Then, in the confirmation dialog box, click **OK**.

4. If you are adding or editing an idle or wrap-up code, specify or change the settings for the code as described in the following table, and then click **Save**.

Setting	Description
Name	Enter the code name that agents will see on the Agent Desktop.
Description	Enter an optional description of the code.
Status	Displayed on the View and Edit pages to specify whether the code is **Active** or **Not Active**.
Is Default	Select **Yes** or **No** to indicate whether this is the default code. • If this is the first idle or wrap-up code to be created, you must make it the default, but you can modify it later after more than one code is defined. • If another default code exists when you select **Set as Default on Save**, it will no longer be the default after you click **Save**. The default idle and wrap-up codes must be included in agent profiles (see “Agent Profiles” on page 88). • The default wrap-up code is used when the agent’s profile specifies Auto Wrap Up. Such agents do not enter wrap-up codes. Instead, they automatically go into the Available state after completing an incoming call and automatically go into the Idle state after making an outdial call. • The default idle code is used when the agent initially logs in and after the agent makes an outdial call if the agent’s profile specifies Auto Wrap Up.
Is System Auxiliary Code	Select **Yes** or **No** to indicate whether this is the system code. System auxiliary codes are used by the multimedia subsystem.
Work Type	Select the work type you want to associate with this code.

Address Books

Topics covered in this section:

- About Address Books
- Creating, Editing, and Deleting Address Books and Address Book Entries

About Address Books

Agents can be given access to an address book from which they can select an entry to dial instead of entering a number in the *Start a new call* or DN field.

You can create address books that are available to all sites or only to a specific site.

You make an address book available to agents by adding it to an agent profile and then assigning the agent profile to the agent. (For more information, see "Agent Profiles" on page 88.)

The number of address books that you can create is determined by the *Maximum Address Books* value provisioned in the tenant settings for your enterprise (see "Tenant Settings" on page 44).

Creating, Editing, and Deleting Address Books and Address Book Entries

To create a new address book or to edit or delete an existing one:

1. On the CJP Portal navigation bar, select **Provisioning** > **Address Book**.
2. On the Address Book page:
   - To add an address book, click **New Address Book**.
   - To edit the settings for an address book, click the ▪▪▪ button to the left of a listed address book and select **Edit**.
   - To delete an address book, click the ▪▪▪ button to the left of a listed team and select **Delete**. Then, in the confirmation dialog box, click **Yes**.
3. If you are adding or editing an address book, enter or edit the settings displayed in the **General Settings** section of the Add or Edit page as described in the following table.

Setting	Description
Name	Enter a name for the address book.
Description	Optionally, enter brief description of the address book.
Parent Type	Select a parent type: • **Tenant**. The address book will be available to all sites at your enterprise. • **Site.** The address book will be only to a specific site.
Parent Name	If the specified Parent Type is **Site**, select the site this address book will be available to.

4. To add an entry to the address book:

    a. In the **Entry List** section of the page, click the button on the lower-right side of the Entry List table.

    b. In the **Edit Entry** dialog box, enter a name and phone number in the available fields and then click **Save**.

    c. Repeat this step to add an additional entry.

5. To edit an address book entry, click the **Edit** button to the right of a listed entry, change the settings that appear in the **Edit Entry** dialog box, and click **Save**.

6. To delete an entry, click the **Delete** button to the right of a listed entry, and in the **Confirm Delete** dialog box, click **Yes**.

7. When finished, click **Save**.

Outdial ANI

The Outdial ANI feature provides a way for an agent to select the phone number that will be sent as the caller ID to the recipient of an outdial call.

You make an outdial ANI list available to the agent by adding it to an agent profile and then assigning the agent profile to the agent. (For more information, see "Agent Profiles" beginning on page 88.)

To add or edit a list of outdial ANIs:

1. On the CJP Portal navigation bar, select **Provisioning** > **Outdial ANI**.
2. On the Outdial ANI page:
    - To add an Outdial ANI list, click the **New Outdial ANI** button.
    - To edit an Outdial ANI list, click the ▪▪▪ button to the left of a listed outdial ANI and select **Edit**.
    - To delete an Outdial ANI list, click the ▪▪▪ button to the left of a listed outdial ANI and select **Delete**. Then, in the confirmation dialog box, click **Yes**.
3. If you are adding or editing an outdial ANI list, you can enter or edit the name and optional description for the list in the **General Settings** section of the page that appears.
4. To add an entry to the list:
    a. Click the button on the lower-right side of the **Outdial ANI Entry List** table.
    b. In the **Add Outdial ANI** dialog box, enter a name and phone number in the available fields and then click **Save**.
    c. Repeat this step to add an additional entry.
5. To edit an entry in the **Outdial ANI Entry List** table:
    a. Click the **Edit** button to the right of the listed entry to open the **Edit Outdial ANI** dialog box.
    b. Make your changes and then click **Save**.
6. To delete an entry, click the **Delete** button to the right of an entry in the **Outdial ANI Entry List** table. Then, in the **Confirm Delete** dialog box, click **Yes**.
7. When finished, click **Save**.

Dial Plans

Topics covered in this section:

- About Dial Plans
- Example Dial Plans
- Adding, Editing, and Deleting Dial Plans

About Dial Plans

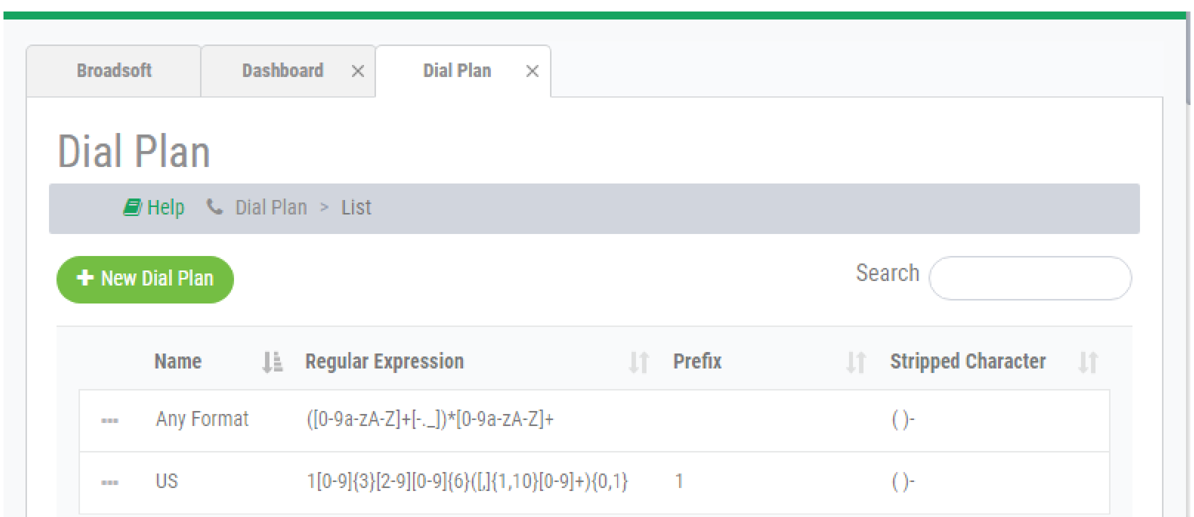
If an agent is assigned a profile in which the *Dial Plan* setting is enabled, the agent can make outdial calls by entering valid text in the **Start a new call** field of the dialpad on the Agent Desktop. The system validates the text entered by the agent based on criteria specified in the Dial Settings section of the agent profile.

Note: In order for the dialpad to be enabled on the Agent Desktop, your service must be set up for Outdial.

Dial plans can also be used to validate the DN an agent uses to log in to the Agent Desktop, as specified in the Agent DN Validation Settings section of the agent profile.

Example Dial Plans

When you add a dial plan, you must create a regular expression to specify the required format for the phone number entered in the **Start a new call** field on the Agent Desktop or to validate the DN an agent uses to log in. Optionally, you can also specify a prefix and stripped characters. The settings for two system-supplied dial plans are shown in the following illustration.



The system-supplied US dial plan shown in the previous illustration accepts input text such as the following:

18005551234
1-800-555-1234
1 (800) 555-1234
18005551234,,,222

In the last example (18005551234,,,222), commas are inserted before an extension number to indicate pauses.

The system performs the following steps to determine the validity of text the agent enters in the **Start a new call** field:

1. Strip the characters specified in the dial plan's *Stripped Characters* field from the input text. In the system-supplied *US* and *Any Format* dial plans, the specified characters are left parenthesis, right parenthesis, space, and hyphen.
2. Validate the resulting text according the specified regular expression. If the text passes this test, it is deemed valid.
3. If the text is not deemed valid, concatenate the text specified in the Prefix field. In the US dial plan, the specified prefix is the number 1.
4. Validate the resulting text according to the defined regular expression again.

Regular Expression for the System-Supplied *US* Dial Plan

The regular expression specified for the US dial plan is shown below with annotations.

```
1[0-9]{3}[2-9][0-9]{6}([,]{1,10}[0-9]+){0,1}
1   2      3     4            5
```

Following is a description of what this regular expression specifies.

1. The first digit must be **1**.
2. Three digits 0-9 must follow.

   {3} means "3 of the preceding"
3. One digit 2-9 must follow.
4. Six digits 0-9 must follow.

   {6} means "6 of the preceding"
5. Zero or one of the following sequence can follow: between one and ten commas, followed by one or more digits 0-9.

   {1,10} means "1 to 10 of the preceding"

   + means "one or more of the preceding"

   {0,1} means "0 or 1 of the preceding"

Regular Expression for the System-Supplied *Any Format* Dial Plan

Following is a second annotated example of a regular expression. This regular expression is specified for the system-supplied dial plan named *Any Format*.

$$\overbrace{\texttt{(}\underbrace{\texttt{[0-9a-zA-Z]+}}_{\textbf{1a}}\underbrace{\texttt{[-.\_]}}_{\textbf{1b}}\texttt{)*}}^{\textbf{1}}\overbrace{\texttt{[0-9a-zA-Z]+}}^{\textbf{2}}$$

This regular expression can be used to validate any phone number as well as the part of an email address preceding the @. For example:

```
123
5551234
555-1234
8005551234
1800FLOWERS
bruce.matthews
```

Following is a description of what this regular expression specifies:

1. The input text can start with zero or more sets of the following (* means "0 or more of the preceding"):
   a. one or more alphanumeric characters (0-9a-zA-Z) followed by
   b. one hyphen, period, or underscore.
2. One or more alphanumeric characters (0-9a-zA-Z) must follow.

Adding, Editing, and Deleting Dial Plans

To add, edit, or delete a dial plan:

1. On the Management Portal navigation bar, select **Dial Plans**.
2. On the Dial Plan page, do one of the following:
   - To add a dial plan click the **Add New Dial Plan** button.
   - To edit the settings for a dial plan, click the ▪▪▪ button to the left of a dial plan and select **Edit**.
   - To delete a dial plan, click the ▪▪▪ button to the left of a dial plan and select **Delete**.
3. If you are adding or editing a dial plan, specify or change the settings as described in the following table and then click **Save**.

Setting	Description
Name	Enter a name for the dial plan. This name will be displayed on the Add Agent Profile and Edit Agent Profile pages in the Ad-hoc Dial Plan and Agent DN Validation Settings sections.
Regular Expression	Enter a regular expression that will be used to validate the text entered in the **Start a new call** field or in the DN field when the agent logs in. The regular expression specifies the format of the phone number and which characters can be used, which characters, if any, are required, and which, if any, are prohibited. For examples, see: • "Regular Expression for the System-Supplied US Dial Plan" on page 85 • "Regular Expression for the System-Supplied Any Format Dial Plan" on page 86.
Prefix	Optionally enter a prefix that the system will automatically add to the entered phone number if the agent does not include it—for example, the digit 1 for long-distance calls made within the United States
Stripped Character	Specify any characters that should be stripped from the character string entered by the agent—for example, left and right parentheses, space, and hyphen.

Password Policy

A password policy is a set of rules governing the required length, duration, valid characters, and other characteristics of passwords. You assign a password policy to a user profile which can then be assigned to a user (see "CJP Users" on page 99).

To create, edit, or delete a password policy:

1. On the CJP Portal navigation bar, select **Provisioning** > **Password Policy**.
2. On the Password Policy page:
   - To add a new password policy, click **New Password Policy**.
   - To edit a password policy, click the ▪▪▪ button to the left of a listed policy and select **Edit**.
   - To delete a code, click the ▪▪▪ button to the left of a listed code and select **Delete**. Then, in the confirmation dialog box, click **OK**.
3. If you are adding or editing a password policy, specify or change the settings for the policy as described in the following table, and then click **Save**.

Setting	Description
General Settings	
Name	Enter a name for the policy.
Description	Optionally, enter a description of the policy.
Is Default	Select **Yes** or **No** to specify whether or not this is the default password policy for user accounts.
Advanced Settings	
Password Length	Specify the minimum number of characters required in a password.
Number of Passwords Remembered	Specify the number of unique passwords a user must use before a previous password can be reused.
Maximum Invalid Attempts	Specify the number of times a user can enter an incorrect password before being locked out.
Password Expiry Period	Specify the number of days a password can be used before the user must change it.
Must Contain At Least One Uppercase Letter	Select **Yes** or **No** to specify whether or not a password must include at least one uppercase letter.
Must Contain At Least One Lowercase Letter.	Select **Yes** or **No** to specify whether or not a password must include at least one lowercase letter.
Must Contain At Least One Digit	Select **Yes** or **No** to specify whether or not a password must include at least one digit.

Agent Profiles

An agent profile is a group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies permissions relating to queue transfers, agent consults and transfers ("buddy teams"), wrap-up and idle codes, wrap-up timeout values, agent auto-available, dialing capabilities and behaviors, restrictions on the DN the agent can enter to log in to the Agent Desktop, and access to current personal, queue, and team statistics.

Topics covered in this section:

- Viewing, Creating, Editing, and Deleting Agent Profiles
- General Information Settings
- Auxiliary Code Settings
- Collaboration Settings
- Dial Plan Settings
- Agent DN Validation Settings
- Agent Viewable Statistics Settings
- Agent Threshold Settings

Viewing, Creating, Editing, and Deleting Agent Profiles

You can create an agent profile that will be available for all agents at your enterprise or only for agents at a specific site.

Note: You cannot delete an agent profile that is assigned to an agent.

To view, create, edit, or delete an agent profile:

1. On the CJP Portal navigation bar, select **Provisioning** > **Agent Profiles**.
2. On the Agent Profiles list page:
   - To view the settings for an existing agent profile, click the ▪▪▪ button to the left of a listed profile and select **View**.
   - To add a new profile, click the **New Agent Profile** button.
   - To copy or edit the settings for a profile, click the ▪▪▪ button to the left of a listed profile and select **Copy** or **Edit**.
   - To delete a profile, click the ▪▪▪ button to the left of a listed profile and select **Delete**. Then, in the confirmation dialog box, click **OK**.
3. If you are adding, copying, or editing a profile, specify or change the settings displayed on each profile page:
   - "General Information Settings" on page 90
   - "Auxiliary Code Settings" on page 90
   - "Collaboration Settings" on page 92
   - "Dial Plan Settings" on page 92
   - "Agent DN Validation Settings" on page 94
   - "Agent Viewable Statistics Settings" on page 94
   - "Agent Threshold Settings" on page 95

General Information Settings

The Agent Profile > General Information page displays the settings described in the following table.

Setting	Description
Name	Enter a descriptive name for the profile.
Description	Optionally, enter a description of the profile.
Status	This setting appears only on the Edit page to indicate whether the profile is Active or Not Active. • **Active**. The profile can be assigned to an agent. • **Not Active**. The profile cannot be assigned to an agent.
Parent Type	Select a parent type: • **Tenant**. The agent profile will be available to all sites at your enterprise. • **Site.** The address book will be only to a specific site.
Parent Name	If the specified Parent Type is **Site**, select the site this agent profile will be available to.
Screen Popups	Select **Yes** or **No** to specify whether or not external pop-up screens will be allowed.
Last Agent Routing	This setting appears only if the Last Agent Routing feature is enabled for your enterprise. Select **Yes** or **No** to specify whether to display the Last Agent Routing check box on the Agent Desktop during Wrap Up. Agents can select this check box to request that the call be routed to them the next time the customer calls for the same issue.

Auxiliary Code Settings

The Agent Profile > Auxiliary Codes page displays settings for specifying wrap-up and idle code availability and permissions related to wrap up and agent auto-available.

Setting	Description
Wrap Up Settings	Select the **Auto Wrap Up with Time Out Of** button and enter a value in the available field if you want the default wrap-up code to be automatically entered after the agent completes a call unless the agent selects a code within the number of seconds specified in the field. Select **Manual Wrap Up** if you want the agent to select a wrap-up code after completing a call. No timeout is associated with manual wrap-up.

Setting	Description
Agent Available After Outdial	Select **Yes** if you want the agent to go into the Available state after completing and wrapping up an outdial call unless the agent selects an Idle state from the STATUS NOW drop-down list before selecting a wrap-up code. Select **No** if you want the agent to go into the Idle state after completing and wrapping up an outdial call.
Allow Auto Wrap Up Extension	Select **Yes** if you want agents to be able to cancel the auto wrap-up time, allowing them to extend the wrap-up time. When this option set to Yes, the **Cancel Auto Wrap Up** option is displayed while the agent is in auto-wrap-up mode.
Wrap Up Codes	Specify which wrap-up codes will be available in the drop-down list on the Agent Desktop: • Select **All** to make all wrap-up codes available. • Select **Specific** to make specific codes available; then select codes from the drop-down list. To remove a code, click the **x** on the left side of the listed code name. The default wrap-up code must be included in the Selected Codes list. The default code is used when the agent's profile specifies Auto Wrap Up. Such agents do not enter wrap-up codes.
Idle Codes	Specify which Idle codes will be available in the drop-down list on the Agent Desktop: • Select **All** to make all idle codes available. • Select **Specific** to make specific codes available; then select codes from the drop-down list. To remove a code, click the **x** on the left side of the listed code name. The default idle code must be included in the Selected list. The default code is used: • When the agent initially logs in. • After the agent makes an outdial call if the agent's profile specifies Auto Wrap Up.

Collaboration Settings

The Agent Profile > Collaboration page displays the settings described in the following table.

Setting	Description
Entry Point/Queue Transfer Targets	Specify which entry points and queues will be available for selection in the Queue drop-down list on the Agent Desktop: • Select **All** to make all entry points and queues available. • Select **Specific** to make specific entry points and queues available; then select entry points and queues from the drop-down list. • Select **None** if you do not want to make any entry points or queues available as transfer targets.
Buddy Teams	Specify the teams whose agents will be available for selection in the Agent drop-down list on the Agent Desktop. These are the agents that an agent with this profile will be able to consult with, conference with, and transfer calls to. • Select **All** to make the agents on all teams available. • Select **Specific** to make agents on specific teams available; then select teams from the drop-down list. • Select **None** if you do not want to make any teams available for consultation, conference, or call transfer.
Consult To Queue	Specify **Yes** if you want the agent to be able to select a queue in the Queue drop-down as a target for a consultation. The target must be an inbound CJP queue. • If the agent selects a proxy queue or an entry point as the target, the Consult button is disabled. • Consult to queue is supported only for queues that have teams serving them. If the agent attempts to consult to a queue that only redirects to another entry point or queue, a *Consult Failed* message is displayed.

Dial Plan Settings

The Agent Profile > Dial Plans page displays the following settings.

Setting	Description
Outdial Enabled	If you want the agent to be able to make outdial calls, select **Yes**. If you do not want the agent to make outdial calls, select **No**—this setting prevents the dialpad from appearing on the Agent Desktop. **Note:** In order for the dialpad to be displayed, your service must be set up for Outdial.

Setting	Description
Outdial Entry Points	If **Outdial Enabled** is set to **Yes**, select the outdial entry point that the agent will use to make outdial calls.
Address Book	Select the address book that includes speed numbers you want the agent to be able to select to make outdial and consult calls. If **Outdial Enabled** is set to **No** and you select an address book, the agent will be able select a name from the address book for consults and transfers, but will not be able to make outdial calls. Select **None** if you do not want to make an address book available to the agent. See "Creating, Editing, and Deleting Address Books and Address Book Entries" on page 81 for more information.
Dial Plan Enabled	If you want the agent to be able to make ad-hoc outdial calls, select **Yes**. If you specify **No**, the agent will not be able to make ad-hoc outdial calls. However, if **Outdial Enabled** is set to **Yes**, the agent will be able to make an outdial call—but only by either selecting an entry from the address book or typing a name from the address book in the **Start a new call** field on the dialpad.
Select Dial Plan	This setting appears only if **Dial Plan Enabled** is set to **Yes**. Select the dial plans that will determine which inputs the system will accept in the **Start a new call** field. Two system-supplied dial plans are available and others may have been created for your enterprise. • **US** accepts input text such as the following: 18005551234 1-800-555-1234 1 (800) 555-1234 • **Any Format** accepts any sequence of alphanumeric characters, hyphens, parentheses, and spaces, plus nonsequential underscores and periods. The input cannot begin with an underscore or period; hyphens, spaces, and parentheses are stripped, but periods and underscores are not. This format can be used for any phone number as well as for the first part of an e-mail address or SIP URI. For example: 123 5551234 555-1234 1-800-FLOWERS (800) 555-1234 John.Smith
Outdial ANI	This setting appears only if **Outdial Enabled** is set to **Yes**. Optionally, select the list of phone numbers that the agent can select before making an outdial call. The selected number is sent as the caller ID to the recipient of the call (see "Outdial ANI" on page 83 for more information).

Agent DN Validation Settings

The Agent Profile > Agent DN Validation page displays the following settings.

Setting	Description
Validation for Agent DN	To allow the agent to use any DN to log in to the Agent Desktop, leave this field set to **Unrestricted**. To restrict the DN the agent can enter, select one of the following buttons: • **Provisioned Value** restricts the login DN to the default value provisioned for the agent. Note that if no default DN value is provisioned, the agent will be able to enter any DN value. • **Validation Criteria** restricts the login DN to the format specified in the **Validation Criteria** setting.
Validation Criteria	This setting appears only if the **Validation Criteria** button is selected. Select the formats that the login DN will be restricted to: • Select **All** to restrict the DN to all available formats. • Select **Specific** and then select formats in the **Select Validation Criteria** drop-down list that appears. For a description of the US and Any Format validation criteria, see the entry for Select Dial Plan in the previous section.

Agent Viewable Statistics Settings

The Agent Profile > Agent Viewable Statistics page displays the following settings.

Setting	Description
Agent Statistics	Select **Yes** or **No** to specify whether or not you want the agent to be able to display the Agent Personal Statistics tab by clicking a button on the Agent Desktop.
Queue Statistics	This setting controls whether or not the agent can display statistics for all or some queues in the Agent Personal Statistics tab. • To enable the agent to display statistics for all queues, select the **All** button. • To enable the agent to display statistics for specific queues, select the **Specific** button; then select queues from the **Select Queues** drop-down list. • To prevent the agent from displaying queue statistics, select the **None** button.
Logged-in Team Statistics	Select **Yes** or **No** to specify whether or not the agent can view statistics for the team that the agent is logged in to. **Note:** This setting and the following setting are independent of each other.

Setting	Description
Team Statistics	Do one of the following: • To enable the agent to display statistics for all teams, select the **All** button. • To enable the agent to display statistics for specific teams, select the **Specific** button; then select teams from the **Select Teams** drop-down list. • To enable the agent to display statistics only for the team that the agent is logged in to, select the **Specific** button and leave the Select Teams list empty, and select **Yes** in the **Logged-in Team Statistics** field. • To prevent the agent from displaying team statistics, select the **None** button in this field and select **No** in the **Logged-in Team Statistics** field.
Access To Recordings	This setting appears only if your enterprise uses the Agent Access to Recordings feature. Select **Yes** or **No** to specify whether or not the agent can access recordings of calls handled in the last 24 hours.

Agent Threshold Settings

The Agent Profile > Agent Thresholds page appears only if your enterprise uses the Threshold Alerts feature. This page provides settings for specifying which, if any, agent-viewable alerts the agent can display in the Agent Personal Statistics tab on the Agent Desktop.

If your enterprise uses the Agent Threshold Alerts feature, the page also provides settings for specifying which, if any, agent thresholds are associated with the agent.

To enable display of the Agent Personal Statistics tab, you must also set *Agent Statistics* to *Yes* on the *Agent Viewable Statistics* page (see the previous topic, "Agent Viewable Statistics Settings").

See "Threshold Rules" on page 75 for more information.

Setting	Description
Agent Viewable Threshold Alerts	If agent-viewable threshold rules are available, specify the alerts you want the agent to receive by selecting rules in the drop-down list. When a selected threshold rule is breached, an alert is generated and displayed in the Threshold Alerts section of the Agent Personal Statistics tab.

Setting	Description
Enable Agent Threshold Alerts	This setting appears only if your enterprise uses the Agent Threshold Alerts feature. Select **Yes** or **No** to specify whether or not you want the agent and the agent's supervisor to receive alerts when the agent breaches specified threshold rules. If you selected **Yes** and agent-viewable agent threshold alerts are available, specify the alerts you want the agent and supervisor to receive by selecting rules from the drop-down list. If the agent breaches a selected rule, an alert is generated and displayed in the Agent Threshold Alerts section of the Agent Personal Statistics tab as well on the supervisor's CJP Management Portal.

Call-Associated Data Variables

Topics covered in this section:

- About Call-Associated Data Variables
- Defining or Editing a CAD Variable

About Call-Associated Data Variables

Call-associated data (CAD) variables can be defined in the Provisioning module for use in call control scripts to collect one of the following types of data values:

- **Caller-entered digits** collected while the call is in the IVR system, such as an account number.
- **Agent-entered data**, such as a case number or action code.

CAD values are stored in the cumulative call detail records (CCDRs) that Management Portal users can display and export to Excel or .csv files. Note the following:

- The system will store data for a CAD variable used in a call control script only if the variable name matches the name of an active CAD variable provisioned for your enterprise. You can view a list of the CAD variables used in a call control script in the Call Control section of the Create Routing Strategy or Edit Routing Strategy page (see "Assigning Call Control Scripts and Parameters" beginning on page 161).
- A CAD value entered by an agent during a call is saved to the database after the agent completes the Wrap-up state for that call. If Agent Desktop connectivity is lost before that point and cannot be recovered, the value entered by the agent will not be saved.

- If a call is transferred to another agent or queue and both agents enter or edit a CAD value, only the CAD value sent by the last wrap-up event is saved to the database. For example, consider the following scenario:

  1. The first agent enters a CAD value, then goes into the Wrap-up state and remains in that state.
  2. The second agent edits the CAD value, completes the Wrap-up state for that call, and becomes available to handle the next call.
  3. The first agent changes the CAD value, then completes the Wrap-up state for that call and becomes available to handle the next call.

  In this case, the last value entered by the first agent would be saved to the database.

- For best results, agents who are expected to enter CAD values should not be assigned an agent profile that places them automatically in the Available state after a call (see "Agent Profiles" beginning on page 88).

Be aware of the following security considerations:

- Data stored through use of a CAD variable is visible to all individuals who have access to historical records on the Management Portal. Secure data such as credit card numbers, PINs, and social security numbers should *not* be stored through use of CAD variables.
- The CAD data will be preserved subject to network availability and other operation considerations. CAD variables provide reference data only, and are not intended to provide Customer Relationship Management (CRM) functionality.

Defining or Editing a CAD Variable

A CAD variable cannot be deleted, but the status of the variable can be changed from Active to Not Active. An inactive CAD variable cannot be used to store data collected through a control script.

The maximum number of inactive CAD variables that you can define is determined by the *Number of CAD Variables* setting provisioned for your enterprise (see "Tenant Settings" on page 44).

To define or edit a CAD variable:

1. On the CJP Portal navigation bar, select **Provisioning** > **CAD Variables**.
2. On the CAD Variables page:
   - To add a new variable, click **New CAD Variable**.
   - To edit a CAD variable, click the ▪▪▪ button to the left of a listed variable and select **Edit**.
3. On the Add or Edt page that appears, specify the settings for the variable as described in the following table, and then click **Save**.

Setting	Description
Name	Enter the CAD variable name. The name can include alphanumeric characters and the following special characters: hyphen (-), underscore (_), and the space character. The name cannot begin with a space and cannot include two or more hyphens, underscores, or spaces in a row. The name cannot be modified after the CAD variable is created.
Description	Enter an optional description of the CAD.
Agent Editable	Select **Yes** or **No** to specify whether or not agents will be able to edit the value of the variable from the CJP Agent Desktop.
Status	Select **Active** or **Not A**ctive.

CJP Users

CJP Management Portal users are typically contact center supervisors and managers who are responsible for day-to-day operations. They use the CJP Management Portal to access the modules that provide them with the real-time visibility and control they need over the resources they are responsible for. Each user account includes a user profile that specifies the password policy as well as the level of access to CJP Portal modules and the access rights to entry points, queues, sites, and teams.

Agents use the CJP Agent Desktop for handling customer interaction. An agent user account must include a user profile that specifies access to the Agent Desktop module, and must also include an agent profile, described in “Agent Profiles” on page 88.

Topics covered in this section:

- Management Portal User Profiles
- Management Portal and Agent User Accounts
- Performing an Agent Bulk Upload
- Unlocking a Locked CJP User Account
- Deleting Multiple Agent User Accounts Simultaneously
- Checking the Status of a Bulk Operation

Management Portal User Profiles

To add, edit, delete, or view the settings for a user profile:

1. On the Management Portal navigation bar, select **Provisioning > User Profiles**.
2. On the User Profiles page:
   - To view the settings for an existing user profile, click the ▪▪▪ button to the left of a listed profile and select **View**.
   - To add a new profile, click the **New User Profile** button.
   - To copy or edit the settings for a profile, click the ▪▪▪ button to the left of a listed profile and select **Copy** or **Edit**.
   - To delete a profile, click the ▪▪▪ button to the left of a listed profile and select **Delete**. Then, in the confirmation dialog box, click **OK**.

3. If you are adding, copying, or editing a profile, specify or change the settings displayed in each of the three User Profile pages. Settings are described in the following sections:

   - General Settings
   - Module Settings
   - Access Rights

General Settings

The User Profile > General Settings page displays the settings described in the following table.

Setting	Description
Name	Enter a descriptive name for the profile.
Description	Optionally enter a description of the profile.
Password Policy	Leave the default setting or select a password policy from the drop-down list (see "Password Policy" on page 87 for more information).
Status	This setting appears on the Edit page to specify whether the profile is Active or Not Active.

Module Settings

The User Profile > Module Settings page displays the settings described in the following table. For each setting, specify an access level: **Edit**, **View**, or **None**.

Setting	Description
Agent Desktop	Provides access to the Agent Desktop.
Analyzer	Provides access to the CJP Customer Engagement Analyzer, a reporting and analytics application used to segment, profile and visualize the data in contact center systems and identify key variables that impact productivity and desired business outcomes. The following additional permissions can be enabled for the Analyzer module: • **Analyzer Data Exchange:** Provides access to the module for creating and modifying the Analyzer schemas. • **Business Rules:** Enables authorized users to incorporate customer data into the CJP environment for custom routing as well as for general implementation.

Setting	Description
Call Monitoring	Enables authorized users to silently monitor the quality of service being delivered across their multi-source contact centers. Through a simplified Web interface, users can select the queue, team, site, or agent they want to silently monitor. The following additional permissions can be enabled for the Call Monitoring module: • **Barge-In:** Allows the user to join any call he or she is monitoring and participate in the conversation between the agent and the customer. • **Mid-Call Monitor.** Allows the user to monitor a call that is already in progress and connected to an agent**.** • **Whisper Coach:** Allows a user who is monitoring a call to speak to the agent handling the call without being heard by the customer. • **Restricted Monitor Only:** Prevents users from viewing and editing monitoring schedules that they did not create. • **View Blind Monitor Requests:** Allows the user to see the blind monitoring requests of other users.
Call Recording	Enables authorized users to record any active call that is managed by the CJP service. Through a Web interface, authorized users can select which queue, team, site, and agent they want to record, and for what time period.
Campaign Manager	Enables authorized users to manager outbound voice and email campaigns.
Historical Reports	Provides access to reports that can be viewed online through a Web browser and downloaded to a data analysis tool such as Microsoft Excel. The following additional permissions can be enabled for the Historical Reports module: • **Monitored Calls:** Enables the Monitored Calls page. • **Threshold Alerts:** Enables the Threshold Alerts page and allows the user to view the threshold alerts for the entities to which the user has access. • **Usage Metrics Report:** Allows the user to access the Usage Metrics report.
Multimedia	Provides access to MM modules (MM Provisioning, MM Agent Desktop, MM Reports) based on which of these modules are set to **On**: • **MM Provisioning:** Enables authorized users to view and provision resources used for email and chat. • **MM Agent Desktop:** Enables authorized users to monitor their assigned email and chat queues and the agents assigned to those queues, reallocate and reject email contacts, approve email responses, silently monitor chat conversations, coach the agent being monitored, and join a chat in progress. • **MM Reports: TBD**

Setting	Description
Provisioning	Provides access to the Provisioning module, which enables authorized users to view the settings provisioned for their enterprise and to create and edit provisioned entities depending the following permissions, which are displayed when you select View or Edit: • **Manage Entry Points/Queues:** Allows the user to create and edit CJP entry points and queues. • **Manage Sites:** Allows the user to create and edit CJP sites. • **Manage Teams:** Allows the user to create and edit CJP teams. • **Manage Users:** Allows the user to create and edit CJP user accounts. • **Manage User Profiles:** Allows the user to create and edit CJP user profiles. • **Account Unlock:** Allows the user to lock and unlock CJP user accounts that have been locked because the user entered an incorrect password more than a specified number of times in succession (determined by the value of the *Maximum Invalid Attempts* setting in the password policy assigned to the user—see “Password Policy” on page 87). • **Password Reset:** Allows the user to reset or reassign passwords for agents at the sites and on the teams to which the user has access. • **DN Mapping:** Allows the user to map DNs to entry points. • **Manage Dial Plans:** Allows the user to create and edit dial plans. • **Audit Trail:** Allows users to access the Audit Trail interface where they can view details about provisioning changes made for their enterprise. • **Branding:** Provides access to the Custom Theme settings on the Management Portal landing page where the user can customize the banner color and images used on Management Portal pages. • **Manage Tenants:** Allows the user to edit some of the tenant settings on the **Provisioning > *Tenant Name*** page. • **Revoke API Key:** Allows the user to revoke the API key of a user.

Setting	Description
Real-Time Reports	Provides real-time visibility into contact center activity throughout the enterprise. Using a standard Web browser, authorized users can access call statistics for each site, team, agent, queue, and entry point, and can view current call volume and threshold adherence. The following additional permissions can be enabled for the Real-Time Reports module: • **Agent State Change:** Allows the user to log out agents from the Real-Time Reports module. • **Real-Time Threshold Alerts:** Enables the Threshold Alerts page and allows the user to view the threshold alerts for the entities to which the user has access. • **Web Callback Report:** Provides access to the Web Callback Report. • **Summary View:** Enables the agent summary view (In IVR, In Queue, Connected and Available Agents) to be displayed on the Management Portal landing page.
Recording Management	Provides access to the Recording Management module, which enables authorized users to search for and play audio files recorded through the CJP Call Recording feature. The following additional permissions can be enabled for the Recording Management module: • **Manage Recordings:** Allows the user to delete and restore recordings. • **Tags:** Allows the user to access the Tags tab to view. create, and edit tags that can be assigned to audio files for use as search criteria. • **Custom Attributes:** Allows the user access the Custom Attributes tab to create and modify custom attributes whose values can be saved with recordings and later searched for. • **Security Keys:** Allows the user access the Security Keys tab to view and change the schedule for generating security key pairs.
Release Notes	Provides access to release notes.
Routing Strategy	Provides access to the Web-based user interface for managing and configuring call-handling strategies. Authorized users can create and schedule global call-routing and team capacity strategies and alter them in real time in response to changes in business dynamics. The following additional permissions can be enabled for the Routing Strategy module: • **Manage Call Flow Scripts**: Enables the user to upload and update call control scripts so they can be used in routing strategies. A control script defines how calls are handled. • **Manage Media Files:** Enables the user to upload and update resources such as audio-on-hold files to make them available for use in routing strategies. Resource files with an extension of *.wav*, *.ulaw, .au*, *.php*, and *.xml* are supported, as well as other formats, depending on how the tenant's system is configured.

Setting	Description
Workforce Optimization	Provides access to Workforce Management, Quality Management, and WFO Analytics, including Speech, Text, and Desktop Analytics.

Access Rights

The **User Profile > Access Rights** page displays the settings described in the following table.

Setting	Description
Entry Points	In the drop-down list next to each setting, select the entities to which the user will have access or select All to provide access to all entities of that type.
Queues	
Sites	
Teams	

Management Portal and Agent User Accounts

The **Users** page provides an interface where you can add new Management Portal and agent users, view and edit existing user accounts, search for specific users, and export the user information to a data analysis tool. You can also delete user accounts, which makes them inactive. An inactive user cannot access CJP features and modules until the account is restored.

The **Agent Settings** on the **Users > Add** page (which are displayed when **Call Center Enabled** is set to **Yes**) provide an interface for adding agents to the system and assigning them to the agent-based teams that they will support. After a user has been added as an agent, you can make real-time changes to that agent's settings—for example, reassigning teams; locking, unlocking, deleting and activating agent accounts; and changing password information.

If you have the appropriate user permission, you can unlock a locked user account as described in "Unlocking a Locked CJP User Account" on page 109.

Note: If an existing user is given new access rights for a site, entry point, or queue, that user must sign out, and then sign in again in order to leverage the new rights.

To view, add, edit, or delete a Management Portal user account:

1. On the CJP Portal navigation bar, select **Provisioning > Users**.
2. The Users page displays controls for doing the following:
   - To sort the list by any column, click a column header. Click a second time to reverse the sort order.
   - To add a new user, click the **New User** button to display the Add page.
   - To view, copy, or edit the settings for a user, click the ▪▪▪ button to the left of a listed user and select **View**, **Copy**, or **Edit**.
   - To delete a user account, click the ▪▪▪ button to the left of a listed user and select **Delete**. Then, in the confirmation dialog box, click **OK**. After deletion, the user account is listed as **Not Active**.
   - To restore a deleted user account, click the ▪▪▪ button to the left of the listed user and select **Restore**.
   - To search for a specific user, enter the user's first, last, or login name in the text box on the upper right side of the Users List page.
   - To view or export the settings for all the entry points, queues, sites, and teams assigned to a user as either a Microsoft Excel file or as an Adobe PDF file, click the ▪▪▪ button to the left of a listed user and select **Excel** or **PDF**.
   - To reset a user's password, click the ▪▪▪ button to the left of the listed user and select **Password Reset**. Then in the confirmation dialog box, click **Yes**. A message informs you that a new password has been sent to the user.
   - To revoke a user's API key, click the ▪▪▪ button to the left of the listed user and select **Revoke API Key**. This setting is available only if your user profile includes the Revoke API Key permission.
3. If you are adding, copying, or editing a user account, specify or change the settings for the user on the page that appears, and then click **Save**. Settings are described in the following table.

Setting	Description
General Settings	
Username	Enter the name the user will use to log in to the CJP system, using a valid email address. This setting cannot be edited.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
Email	Optionally enter the user's email address.
Country	Optionally enter country where the user is located.

Setting	Description
State	Optionally enter state where the user is located.
City	Optionally enter the city where the user is located.
Street	Optionally enter the user's street address.
Work	Optionally, enter the user's work phone number.
Mobile	Optionally, enter the user's mobile phone number as a string, without dashes—for example: 4155551212.
Zip Code	Optionally enter the user's zip code.
User Profile	Select the profile you want to assign to the user from the drop-down list. (see "Management Portal User Profiles" on page 99).
Contact Center Enabled	Select **Yes** if you want to provide this user with login credentials for the Agent Desktop. A Yes setting enables the Agent Settings to be displayed.
Status	This setting is displayed on the List, View and Edit pages to specify whether the user account is Active or not Not Active.
Security Settings	
Password	Enter a password for the user. Minimum and maximum length and allowable characters are based on the password policy specified in the user profile (see "Password Policy" on page 87).
Confirm Password	Re-enter the password.
Account Locked	This is a read-only field unless your user profile includes the Account Unlock permission. For a new user, this field is set to **No**. The system automatically changes this setting to **Yes** if the user enters an incorrect password more than a specified number of times in succession, thus preventing future attempts to log in (see "Unlocking a Locked CJP User Account" on page 109).
Agent Settings	
Site	Select the site the agent is assigned to.
Teams	To assign the agent to one or more teams, select the teams from the drop-down list.
Skill Profile	If the optional Skills-Based Routing feature is enabled, optionally select a skill profile for this agent. This profile overrides any skill profile at the team level associated with the agent (see "Skill Profiles" on page 71).
Agent Profile	Select an agent profile from the list of profiles that have been created for your enterprise (see "Agent Profiles" on page 88). Note that although an agent can belong to several teams, the agent profile for that agent does not change.

Setting	Description
Multimedia Profile	If Multimedia is enabled, optionally select a multimedia profile for the agent. This profile overrides the multimedia profile associated with the team that the agent is logged in to (see “Multimedia Profiles” on page 62).
Multimedia Extension	If Multimedia Extensions are enabled, you can optionally select a multimedia extension for the agent. The list of multimedia extensions is populated based on the multimedia profile assigned to the agent. This multimedia extension overrides the multimedia extension assigned at the site level (see “Multimedia Extensions” on page 65).
Default DN	Optionally, enter the dial number associated with the agent.
External ID	Optionally, enter another means of identifying the agent, such as an employee number.

Performing an Agent Bulk Upload

Rather than adding agents individually, you can upload provisioning information for multiple agents from a .csv file to the CJP provisioning system as described in the following procedures:

- Creating the .csv File
- Uploading the Agent Data

Creating the .csv File

To access a .csv file to use as a template:

➤ In the Portal navigation bar, select **Provisioning > Templates > Agent Upload Template**.

The Agent Bulk Upload template contains the columns described in the following table. After you enter the relevant information for each agent you want to add, and then save the .csv file to your system, you can upload the data to the database as described in the next section, “Uploading the Agent Data.”

Column	Description
FIRST_NAME	Enter the agent’s first name.
LAST_NAME	Enter the agent’s last name.
LOGIN_NAME	Enter the agent’s login name.
EMAIL_ID	Enter the agent’s email address.
DEFAULT_DN	Enter a numerical value representing the extension number associated with the agent.

Column	Description
ACCOUNT_STATUS	Enter 0 (inactive) or 1 (active).
PASSWORD	Enter a password for the agent.
SITE_NAME	Enter the site name.
TEAM_NAME	Enter the name of the team or teams to which the agent belongs. When specifying multiple teams, enter them in this format: *team1/team2/team3/...* (using a '/' to separate the team names).
SKILL_PROFILE_NAME	Enter the name of a skill profile (available only if your enterprise uses the optional skills-based routing feature).
AGENT_PROFILE_NAME	Enter the name of an agent profile.
MEDIA_PROFILE_NAME	Enter the name of a multimedia profile (available only if Multimedia is enabled for your enterprise).
MULTIMEDIA_EXTENSION_NAME	Enter the name of a multimedia extension (available only if Multimedia Extensions are enabled for your enterprise).
EXTERNAL_ID	Optionally, enter another means of identifying the agent, such as an employee number.

Uploading the Agent Data

To upload the agent data:

1. On the Portal navigation bar, select **Provisioning** > **Agent Bulk Upload**.
2. On the **Agent Bulk Upload** page, specify the appropriate settings as described in the following table, and then click **Upload**.

   Note: Values entered here will override values in the .csv file.

Field	Description
Site	Select a site associated with the agents or **None** to use the values in the .csv file.
Team	Select a team associated with the agents or **None** to use the values in the .csv file.
User Profile	Select a user profile to assign to the agents.
Skill Profile	Select a skill profile that you want assigned to the agents or **None** to use the values in the .csv file.
Agent Profile	Select an agent profile or **None** to use the values in the .csv file.

Field	Description
Multimedia Profile	If Multimedia is enabled for your enterprise, select the multimedia profile that you want to assign to the agents or **None** to either use the profile assigned to the team that the agents are logged in to or to use the values in the .csv file.
Multimedia Extension	Select a multimedia extension or **None** to use the values in the .csv file.
Auto-generate Login	Select **Yes** if you want the system to automatically generate login names for the agents (using *first name_last name@domain name of the email id* from the .csv file). Select No to use the values in the .csv file.
Auto-generate Password	Select **Yes** if you want the system to automatically generate passwords for the agents (using the agent's first name). Select **No** to use the values in the .csv file. **Note:** The password policy specified in the agent profile does not apply to agent bulk upload.
Account Status	Specify a value: • **Yes**. The agent accounts will be active in the system after the data is uploaded. • **No**. The agent accounts will be inactive in the system after the data is uploaded. • **None**. The values in the .csv file will be used.
Upload File	Click the **Browse** button, navigate to the .csv file and select it, and then click **Open**.

3. If the data upload is initiated successfully, a message on the upper-right side of the page displays the batch name for the agent bulk operation. To find out if the operation succeeded and if not, the reason for failure, open the **Provisioning** > **Bulk Operations Status** page (see "Checking the Status of a Bulk Operation" on page 110 for more information).

Unlocking a Locked CJP User Account

The system automatically locks a user account if the user enters an incorrect password more than a specified number of times in succession, thus preventing future attempts to log in. The maximum number of allowable invalid login attempts is determined by the password policy assigned to the user (see "Password Policy" on page 87).

A locked user account can be unlocked only by a user whose profile includes the Account Unlock permission.

To unlock a locked Management Portal user account:

1. On the CJP Portal navigation bar, select **Provisioning > Users**.
2. Click the ▪▪▪ button to the left of listed user whose account is locked and select **Edit** .
3. In the Security Settings section of the Users Edit page, change the **Account Locked** setting to **No**, and then click **Save**.

   Your changes are saved and the user's account is no longer locked.

Deleting Multiple Agent User Accounts Simultaneously

To delete multiple agent user accounts simultaneously:

1. On the Portal navigation bar, select **Provisioning** > **Bulk Delete**.
2. On the Bulk Delete page, select a site from the **Site** drop-down list.
3. Select the check box to the left of the username of each agent you want to delete.
4. Click the **Delete Agents** button at the bottom of the page. Then, in the confirmation dialog box, click **Yes**.
5. A message on the upper-right side of the page displays the batch name for the initiated bulk operation. To find out if the operation succeeded and if not, the reason for failure, see the next topic, "Checking the Status of a Bulk Operation."

Checking the Status of a Bulk Operation

After performing a bulk operation to add, delete, unlock, or change the password for multiple agents, you can check the status of the operation as follows:

1. On the Portal navigation bar, select **Provisioning** > **Bulk Operations Status**.
2. From the drop-down lists at the top of the page, select the operation type (**Agent Bulk Upload**, **Agent Bulk Delete**, **Agent Password Reset**, or **Agent Unlock**) and batch name.
3. To filter the list, enter one or more characters in the **Search** box.

   The page displays the details about each agent you attempted to add, delete, unlock, or change the password for, including whether the deletion was successful, and if a deletion failed, the reason for the failure.

Provisioned Items Reports

The **Provisioning** > **Reports** link on the Portal navigation bar provides access to provisioned items reports in either Microsoft Excel or Adobe PDF format. These reports provide details about the settings configured for the following active resources provisioned for your enterprise: sites, teams, agents, inbound entry points, inbound queues, outdial entry points, outdial queues, agent profiles, and, if your enterprise uses the optional Skills-Based Routing feature, skills, skill profiles, and agent skills (which lists the skills assigned to each agent along with the agent's assigned skill profile and teams).

In addition, a Routing report is available that maps entry points, queues, and teams to the entities from which contacts are being received or to which contacts are being routed.

To access a Provisioned Items report:

1. On the CJP Portal navigation bar, select **Provisioning > Reports >** and then select the report you are interested in.
2. On the page that appears:
    - If you selected **Routing Report**, specify whether you want the report to include mapping for **All** routing strategies that are mapped to entities to which you have access, or for **Current** routing strategies only, or for **Active** routing strategies only.
    - Select an export option (**Excel** or **PDF**) and specify whether to download the report or have it emailed to you.
    - Click **OK**.

4 Contact Routing

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

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

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

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

Topics covered in this chapter:

About Contact Routing

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

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

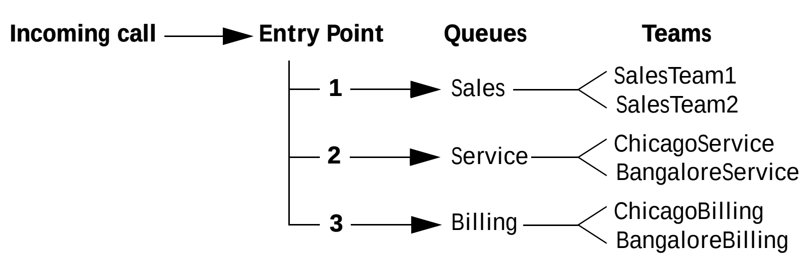
Note: Although the examples in the following sections refer to phone contacts, the same contact routing options are available to other media types.

Topics covered in this section:

- Basic Contact Routing
- About Skills-Based Routing
- About CJP Scorecard Routing
- About Queue Reshuffling
- About Global Routing Strategies
- About Team Capacity Strategies
- About Queue Precedence

Basic Contact Routing

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



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

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

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

A fourth option is available to enterprises that are provisioned with the optional Skills-Based Routing feature, described in the next section, "About Skills-Based Routing."

In addition, Queue Reshuffling can be incorporated into the routing decision for all of the above routing options, as described in "About Queue Reshuffling" on page 121.

For more information, see "Viewing, Creating, Modifying, and Deleting Routing Strategies" on page 146.

About Skills-Based Routing

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

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

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

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

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

For more information, see "Skill Definitions" beginning on page 69.

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

   For more information, see "Skill Profiles" beginning on page 71.

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

   ---

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

   For more information, see "Teams" beginning on page 73 and "Management Portal and Agent User Accounts" beginning on page 104.

4. **Create or upload a call control script** that defines how to treat the call (see "Working with Call Control Scripts" on page 125).

5. **Create the entry point and queue routing strategies**. In the entry point routing strategy, you assign skill requirements to calls based on menu selections collected during call treatment defined in the call control script (see "Assigning Skill Requirements to Incoming Calls" on page 163). The calls are then distributed to the specified queue where they wait for an agent who has been assigned the required skills.

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

   For more information, see "Viewing, Creating, Modifying, and Deleting Routing Strategies" beginning on page 146.

About CJP Scorecard Routing

Note: This feature is not currently available in the CJP Salesforce Edition.

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

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

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

In the routing strategy for a cross-ACD entry point, you organize the queues that will be served by the entry point into one or more prioritized groups and specify one of the following call-routing algorithms to determine which queue will receive the call (for instructions, see "Specifying Call Distribution for a Cross-ACD Entry Point" on page 174):

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

Service Level Metrics

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

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

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

Business Metrics

The Provisioning module provides an interface for defining business metrics to make them available for selection in a routing strategy (see "Business Metrics" on page 72). Each business metric is assigned one of the following variable types:

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

High-Level Logic of Weighted Routing

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

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

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

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

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

- Queues that have exceeded their provisioned *Maximum DNIS Retries* setting.
- Queues that have reached their specified *Capacity*, which identifies the number of active agents who can handle calls for the queue.
- Queues for which both of the following conditions are true:
  - The system has already routed the number of calls specified for the queue in the *Abandoned Call Threshold* setting during the *Compute Interval* period.
  - The percentage of abandoned calls for the queue is equal to or greater than the *Abandoned %* setting specified for the queue.

4. If only one queue is left after the filtering, send the call to that queue.
5. If one or more queues are left after the filtering, send the call to the queue with the highest positive differential in the percentages generated from inverse proportional values for inverse variables and proportional values for direct variables. This value is determined as follows:

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

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

   Call 2 arrives, and now the differentials are ((46.1% - 100%)=-53.9%, 30.7%, 23.2%), so the call goes to Queue2 because it has the highest positive differential of 30.7.
6. If no queues are left after the filtering:
   - Select the next group and go back to step 2.

     - OR -
   - If this is the last group, reconsider all queues and apply relaxation settings to filters in cycles until a destination queue is identified. As soon as a queue is identified, send the call to that queue.

   Relaxation settings are described in the following table.

Filter	Relaxation Attribute	Allowed Values
Abandons	Abandon %	A number that increases the *Abandoned %* value specified for the queue. Each relaxation will increase the percentage as a cumulative. For example, if the original value is 10% and the relaxation for the first cycle is set to 10, then the new value will be 20% in the first relaxation cycle. If the relaxation for the second cycle is set to 10, the new value will be 30% in the second relaxation cycle.
	Call Threshold	A number that increases the number of calls specified for the queue in the *Abandoned Call Threshold* setting during the *Compute Interval* period before the abandons filter is applied. You can easily stop the system from applying the abandons filter on a queue by increasing this relaxation value to a high number.
Areacode-Blocking	Remove Blocking	Two values are allowed: • **0** means do not relax. • **1** means relax area code blocking for the queue.
Clamp Reached	Clamp %	A number that increases the *Percentage Clamp* value specified for the queue. Each relaxation will increase the percentage as a cumulative. For example, if the original value is 10% and the relaxation for the first cycle is set to 10, then the new value will be 20% in the first relaxation cycle. If the relaxation for the second cycle is set to 10, the new value will be 30% in the second relaxation cycle.
Metric Exceeded	Metric Increment	A number that increases the *Max SLM* value specified for the queue. Each relaxation will increase the percentage as a cumulative. For example, if the original value is 70000 milliseconds and the relaxation for the first cycle is set to 10000 milliseconds, then the new value will be 80000 milliseconds in the first relaxation cycle. If the relaxation for the second cycle is set to 10000, the new value will be 90000 milliseconds in the second relaxation cycle.

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

See "Specifying Call Distribution for a Cross-ACD Entry Point" on page 174 for more information.

About Queue Reshuffling

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

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

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

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

About Global Routing Strategies

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

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

About Queue Precedence

A team can handle contacts from more than one queue. You can assign an agent to take contacts from more than one queue by adding that agent's team to the routing strategies for multiple queues. To cause an agent team to prioritize contacts from one queue ahead of contacts to other queues, you can set a priority for each queue by using the settings available on the Queue Precedence page. For details, see "Specifying Queue Precedence" on page 195.

About Team Capacity Strategies

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

Each capacity-based team is provisioned with a static capacity value (see "Teams" beginning on page 73). This value represents the number of simultaneous contacts the team can handle.

You can create scheduled team capacity strategies to override these settings in response to changing contact center conditions. If a team capacity strategy is not created for a capacity-based team, the system uses the capacity value provisioned for the team. For details, see "Scheduling Team Capacity" on page 190.

About Multimedia

Note: This feature is not currently available in the CJP Salesforce Edition.

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

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

1. **Define multimedia profiles.** If your enterprise subscribes to the CJP Multimedia feature, each agent is associated with a multimedia profile, which specifies how many of each media type the agent can handle concurrently. For more information, see "Multimedia Profiles" beginning on page 62.

2. **Assign multimedia profiles to sites, teams, or agents.** When Multimedia is enabled, every site is associated with a multimedia profile. Each agent-based team at a given site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team's profile unless the agent is assigned a different multimedia profile. For more information, see "Sites" beginning on page 66, "Teams" beginning on page 73, and "Management Portal and Agent User Accounts" beginning on page 104.

3. **Define multimedia extensions.** When Multimedia Extensions are enabled, each agent can be associated with a multimedia extension, which identifies the enabling module for each media type the agent can handle. For more information, see "Multimedia Extensions" beginning on page 53.

4. **Assign multimedia extensions to sites or agents.** Every site can be associated with a multimedia extension. Each agent at a given site is associated with the multimedia extension assigned to that site unless the agent is assigned a different multimedia extension.

5. **Create separate entry points and queues for each media type.** For more information, see Adding an Entry Point or Queue beginning on page 53.

6. **Work with CJP Operations to create routing strategies configured to use a specialized call control script.**

7. **Work with your specific CRM vendor to configure the multimedia interaction at the agent level.**

About Web Callback

Note: This feature is not currently available in the CJP Salesforce Edition.

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

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

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

Callback request details are displayed in a report that you can access from the CJP Management Portal (see "Viewing a Web Callback Request Report" on page 40).

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

1. Creating a Web page to capture the Web callback details and posting them to the CJP Web Callback service.
2. Specifying the maximum callback attempts allowed and the retry attempt interval (see "Module Permissions" beginning on page 48).
3. Creating the outdial entry points to use for Web callbacks (see "Adding an Entry Point or Queue" beginning on page 53).
4. Working with CJP Operations to create routing strategies configured to use a specialized call control script.

Working with Call Control Scripts

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

After a control script is created, authorized users can associate it with a routing strategy for an entry point or queue and specify values for any configurable parameters that are in the script, such as which sound file to play when a call arrives, or the timeout value for entering digits in response to a prompt (see "Assigning Call Control Scripts and Parameters" on page 161).

Topics covered in this section:

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

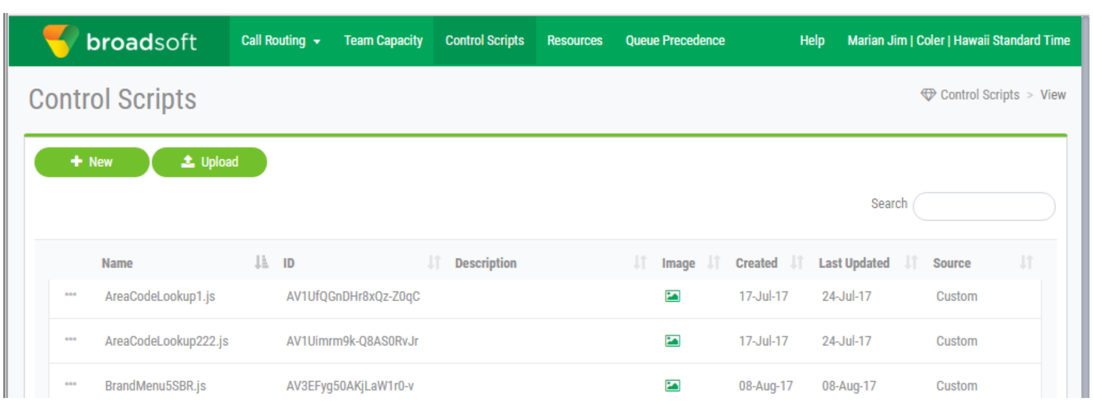
Creating a Call Control Script

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

To create a call control script:

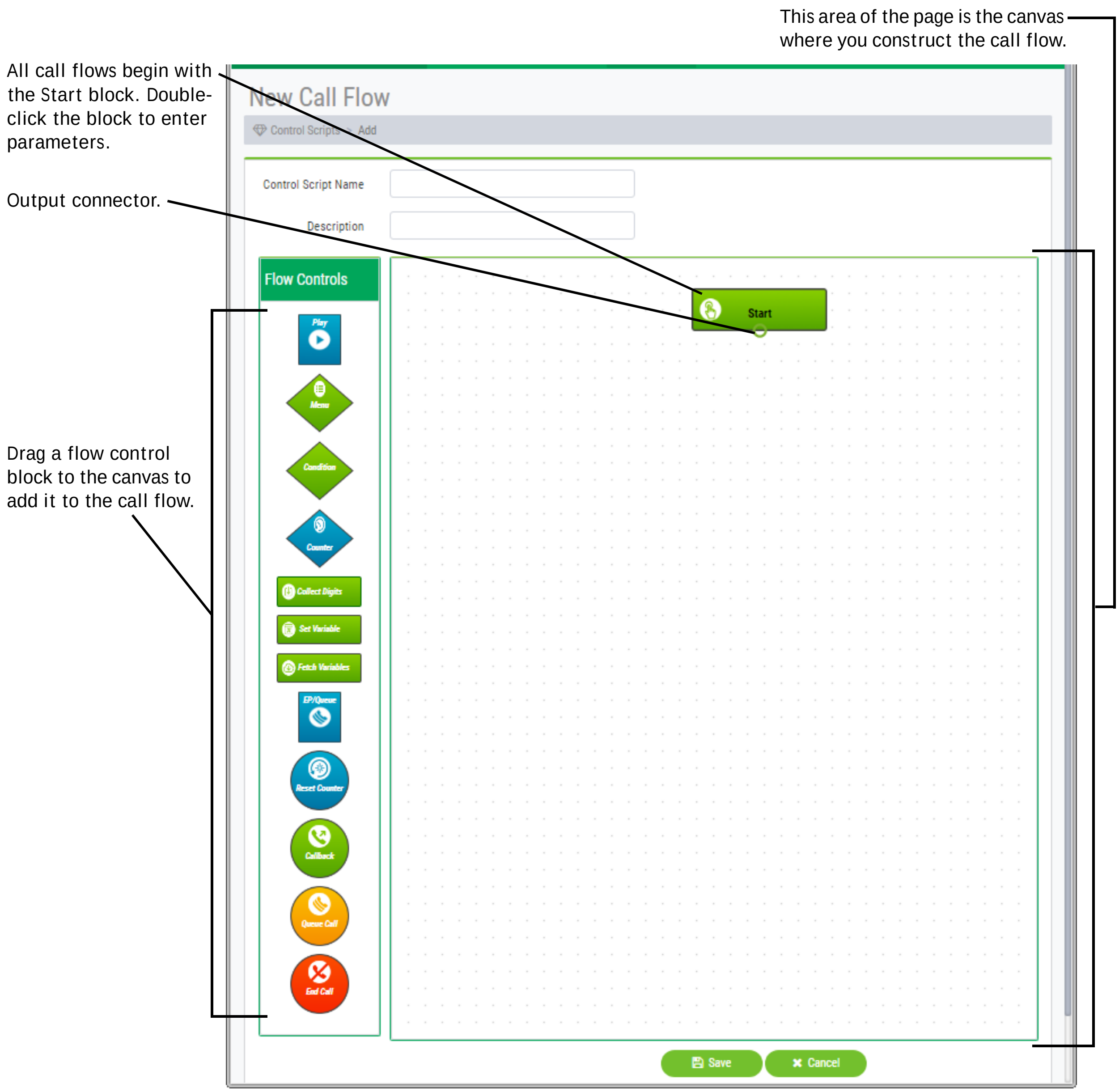
1. Open the **Routing Strategy** module and click the **Control Scripts** button.

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



2. Click **New**.

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



3. Enter a name and optionally, a description for the control script in the fields at the top of the page.

The name you enter will be displayed in the Control Script drop-down list for selection when users create or edit a routing strategy (see “Assigning Call Control Scripts and Parameters” beginning on page 161).

4. Double-click the **Start** block and specify the call flow type (entry point or queue) and other parameters in the dialog box that opens. For a description of each parameter, see “Start Block” on page 129.

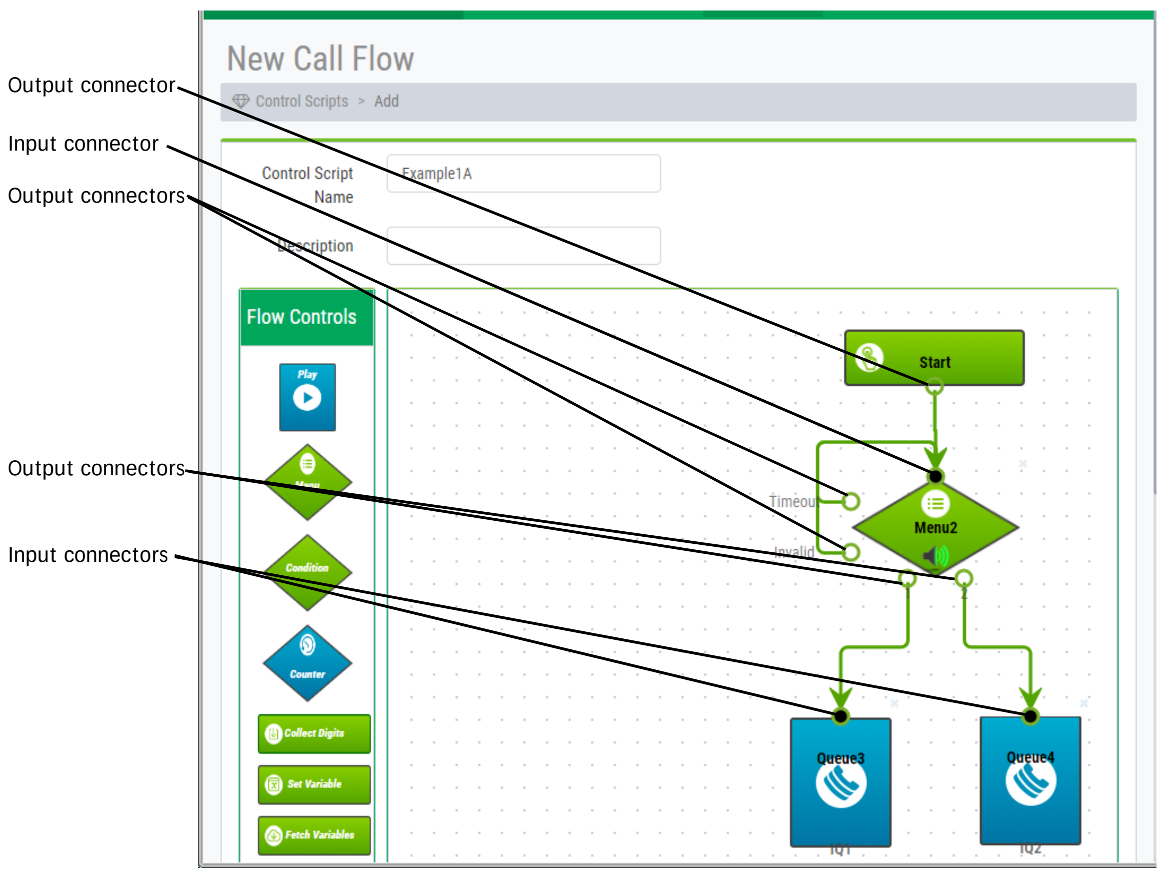
5. Drag flow control blocks to the canvas to add them to the call flow. To remove a block from the canvas, click the **x** on the upper right side of the block.

6. After adding a flow control block, double-click the block and enter the required parameters in the dialog box that opens. For a description of each block and its parameters, see “Call Control Block Descriptions” beginning on page 129.

7. To connect the blocks, drag each output connector to the appropriate input connector.

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

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

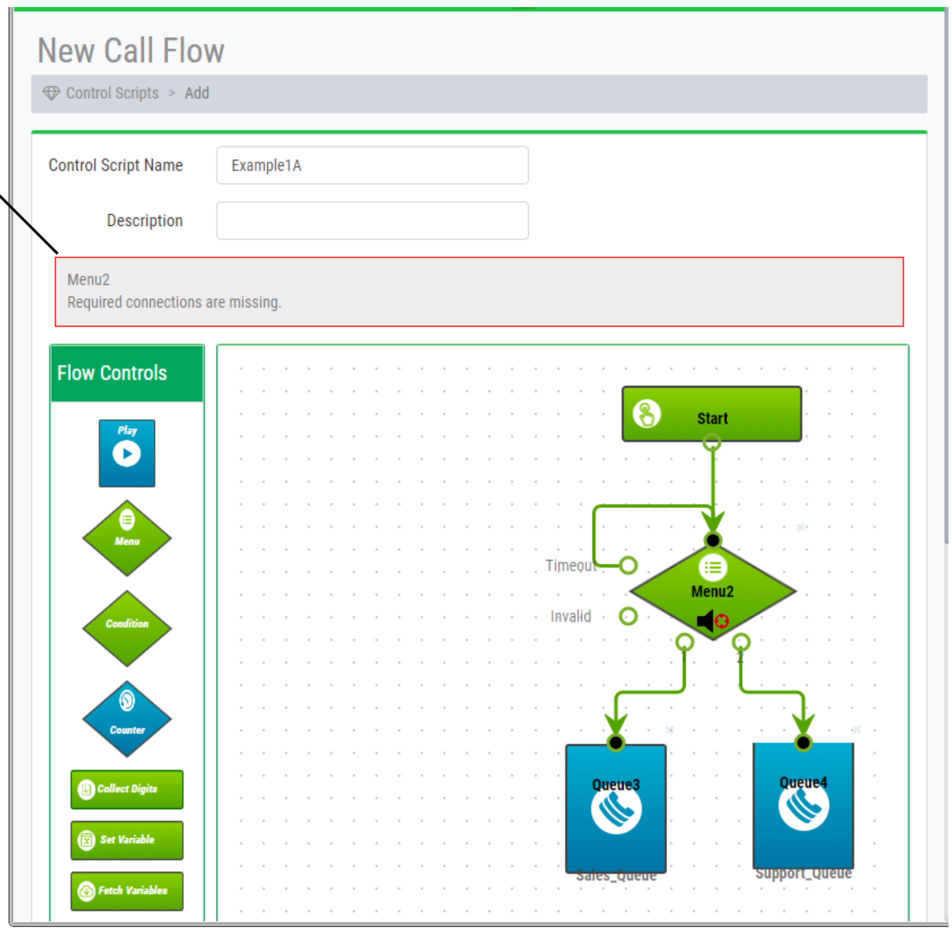


8. Each connector represents a call flow path. To specify a name for a path, click a green connector line and in the dialog box that opens, enter a name and optional description.

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

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

Control script errors are displayed here after you click **Save**.



Call Control Block Descriptions

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

- Start Block
- Play Block
- Menu Block
- Condition Block
- Counter Block
- Collect Digits Block
- Set Variable Block
- Fetch Variable Block
- EP/Queue Block
- Reset Counter Block
- Callback Block
- Queue Call Block
- End Call Block

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

Start Block

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

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

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

Play Block

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

Parameter	Description
Name	Enter a name for the play block or accept the default name.
Media	Select an audio file to play as a prompt.
Description	Optionally enter a description for the block.

Menu Block

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

The Menu block has the following parameters and outputs.

Parameter	**Description**
Name	Enter a name for the menu or accept the default name.
Media	Select an audio file to play as a prompt.
Timeout	Specify the number of seconds to wait after prompting. If the caller does not enter data before the timeout, the call will take the Timeout path configured in the control script.
Number of Branches	Select the number of output branches.
Branch <*N*>	For each branch, select the DTMF digit or symbol that must be entered for the call to take that branch.
Description	Optionally enter a description for the block.

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

Condition Block

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

The Condition block has the following parameters and outputs.

Parameter	**Description**
Operand 1	Select a CAD variable from the drop-down list.

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

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

Counter Block

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

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

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

Collect Digits Block

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

Note: The # character signifies end of input.

The Collect Digits block has the following parameters and outputs.

Parameter	Description
Call Associated Data	Select the name of the call-associated data (CAD) variable to which the entered data will be stored.
Media	Select an audio file to play as a prompt.
Timeout	Specify the number of additional seconds the user has to enter the requested string after the audio message has finished playing or after the last key press, whichever comes later. If the timeout is reached, the call takes the Timeout path configured in the control script.
Maximum Number of Digits	Specify the maximum DTMF string length.
Minimum Number of Digits	Specify the minimum DTMF string length.
Description	Optionally enter a description for the block.

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

Set Variable Block

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

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

Parameter	Description
Description	Optionally enter a description for the block.

Fetch Variable Block

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

The Fetch Variables block has the following parameters and outputs.

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

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

EP/Queue Block

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

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

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

Reset Counter Block

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

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

Callback Block

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

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

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

Parameter	Description
WCB CAD	Optionally you can select other CAD values that came in with the call for delivery along with the callback request.
Description	Optionally enter a description for the block.

Queue Call Block

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

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

End Call Block

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

Copying or Modifying a Call Control Script

You can copy or modify a control script that was created using the call flow builder interface available when you select the *New* button on the Control Scripts page. Custom control scripts can be modified only by Professional Services, after which they must be updated as described in "Updating a Custom Control Script" on page 139.

To copy or modify a call control script:

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

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

2. Click the ▪▪▪ button to the left of a listed control script and select **Copy** or **Edit**.

3. Make your changes. For details about available settings and how to add, remove, and configure call control blocks see "Creating a Call Control Script" beginning on page 125 and "Call Control Block Descriptions" beginning on page 129.

4. Click **Save**. The system automatically performs a validation.

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

5. If you are modifying a control script that has been assigned to a routing strategy, it must be reassigned to the routing strategy as follows:

   a. Click the **Call Routing** button on the menu bar, select the routing strategy to which the control script was previously assigned, and click **Edit**.

   b. In the **Call Control** section of the page, re-select the control script from the drop-down list, edit parameters if necessary, and then click **Apply**.

   c. Click **Update** to save your changes to the routing strategy.

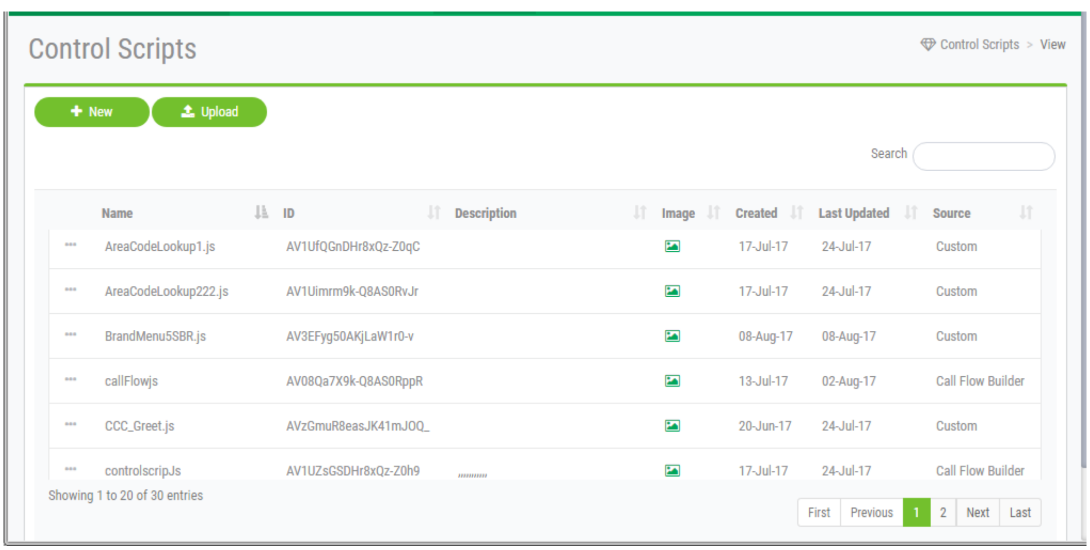
Uploading a Custom Control Script

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

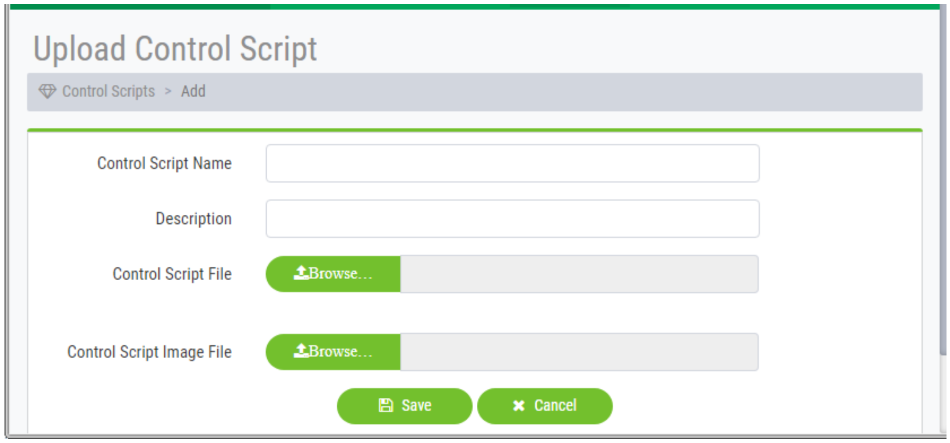
To upload a custom control script:

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

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



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



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

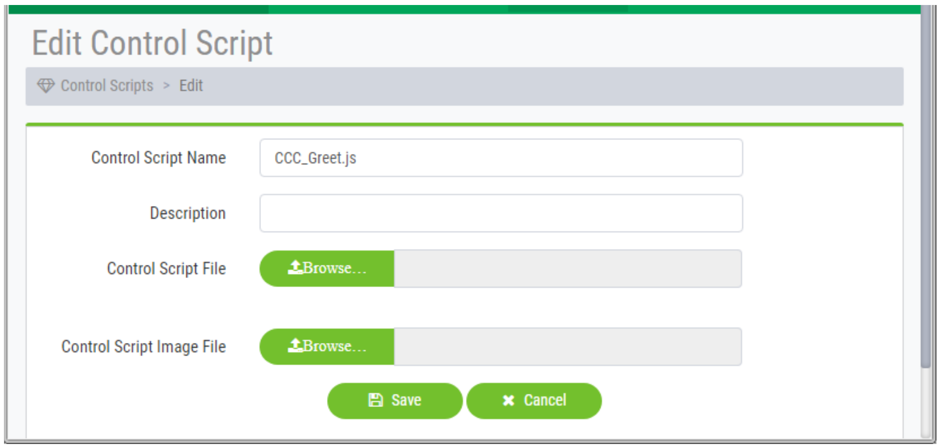
   The dialog box closes and the File field displays the path and file name of the uploaded file. If you entered a different file name in the Control Script Name field, it is overwritten by the name of the file you uploaded. You can change the text in the Control Script Name field if you want to.
5. Optionally upload the associated control script image file as follows: click the **Browse** button to the right of the **Control Script Image** field and, in the dialog box that opens, navigate to the image file in your system and click **Open**. Only GIF and JPEG file formats are supported.
6. Click **Save**. The script is uploaded and available for selection from the Control Scripts list (see "Assigning Call Control Scripts and Parameters" on page 161).

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

Updating a Custom Control Script

To update a custom control script:

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



3. Leave the **Name** field unchanged and enter a new description if desired.
4. Click the **Browse** button in the **Control Script File** field and, in the dialog box that opens, navigate to the control script file in your system and click **Open**.
5. Optionally, upload the associated control script image file as follows: click the **Browse** button in the **Control Script Image** field and, in the dialog box that opens, navigate to the image file in your system and click **Open**. Only GIF and JPEG file formats are supported.
6. Click **Save** to save your changes.
7. Click the **Call Routing** button on the menu bar, select the routing strategy to which the control script was previously assigned, and click **Edit**.
8. In the **Call Control** section of the page, re-select the control script from the drop-down list, edit parameters if necessary, and then click **Apply**.
9. Click **Update** to save your changes to the routing strategy.

Uploading and Updating a Custom Control Script Image File

You can view the image file associated with a control script on the Control Scripts page or by clicking the **Image** link in the Call Control section of the Create Routing Strategy or Edit Routing Strategy page (see “Assigning Call Control Scripts and Parameters” on page 161 for more information). Only GIF and JPEG file formats are supported.

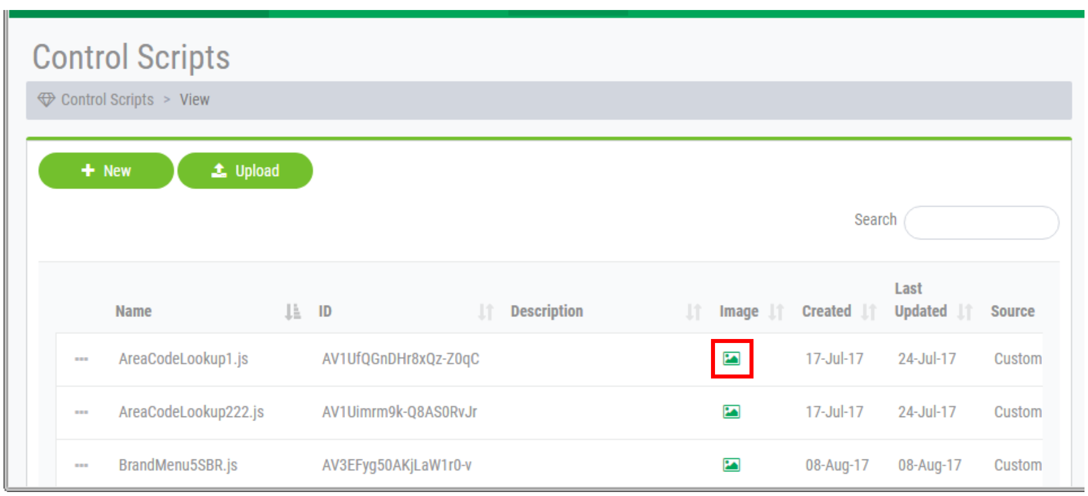
When a control script is created or modified using the call flow builder interface available through the New button on the Control Scripts page, the associated image file is available in the Routing Strategy module when the control script is saved. However, image files associated with custom control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

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

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

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

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



3. Do one of the following:
   - In the Call Flow Image dialog box, click the **Browse** button and in the dialog box that opens, navigate to the image file in your system and click **Open**.

     -OR-

   - Open the directory on your system where the image file is located and then drag and drop it into the designated area of the Call Flow Image dialog box.

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

Viewing and Exporting References to a Control Script

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

To view or export references to a control script:

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

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

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

Uploading and Updating Resource Files

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

- Uploading a Resource File
- Playing or Downloading a .wav File
- Updating a Resource File
- Copying a Resource File
- Exporting the References to a Media File

Uploading a Resource File

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

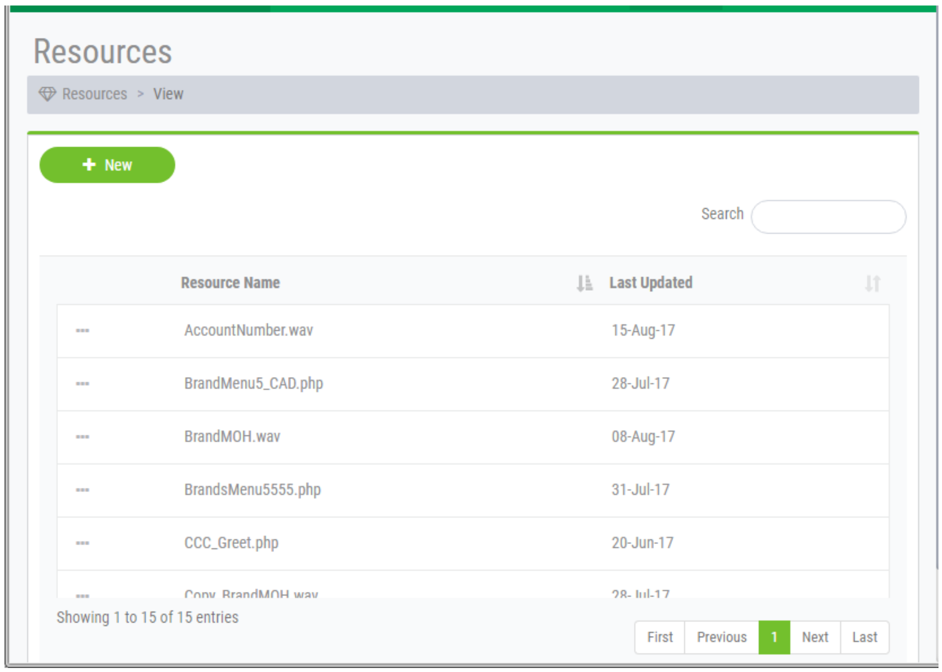
The names of all uploaded resource files are displayed in a drop-down list available when you create or modify a routing strategy. The names of uploaded audio files are displayed in the Media panel on the New Call Flow or Edit Call Flow page when you create or modify a control script.

Keep the following in mind:

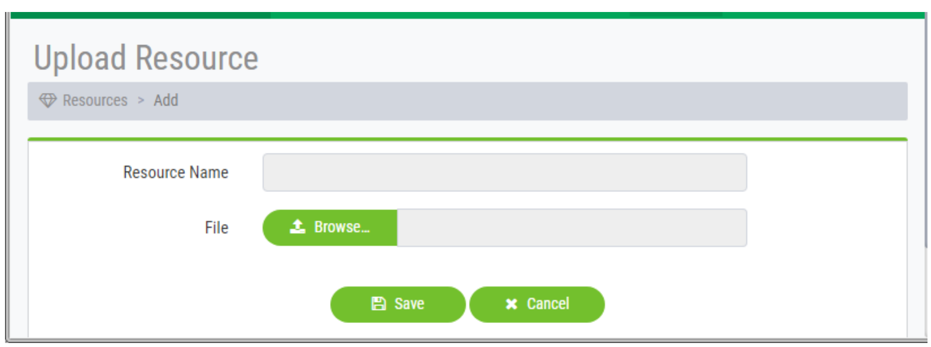
- Make sure that uploaded files have the correct file-name extensions and are properly formatted.
- You must save your resource files for record-keeping purposes because no version control is available.

To upload a resource file:

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



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



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

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

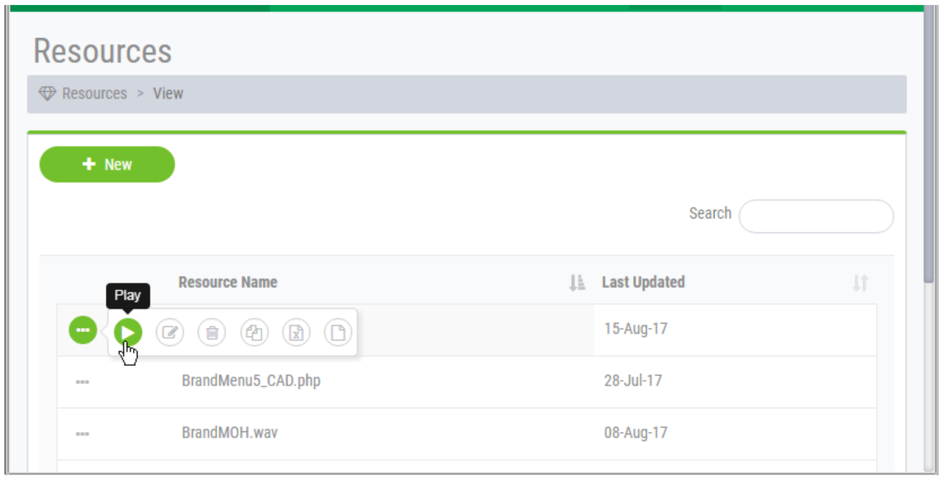
4. Click **Save**. The file is uploaded and available for selection when you create or modify a routing strategy.

Playing or Downloading a .wav File

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

1. Open the **Routing Strategy** module and click the **Resources** button to display the list of uploaded resources.

2. Click the ▪▪▪ button to the left of the file name and select **Play**.



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

Updating a Resource File

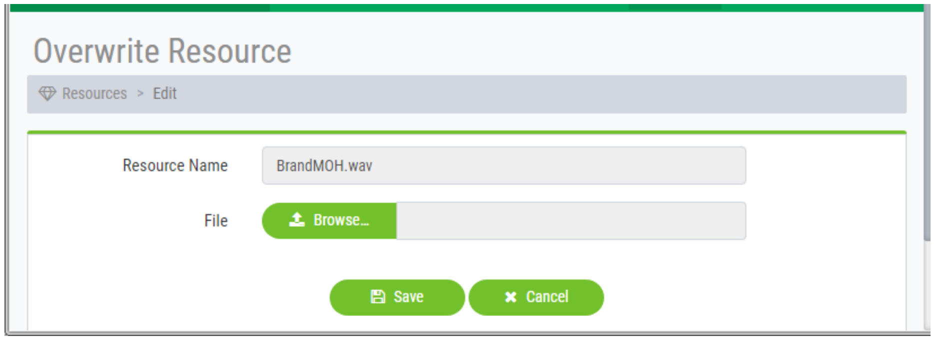
It is strongly recommended that you do not update resources that are currently being used by the system.

To update a resource file:

4. Open the **Routing Strategy** module and click the **Resources** button to display the list of uploaded resources.

5. Click the ▪▪▪ button to the left of the resource you want to update and select **Edit**.

6. On the page that appears, click the **Browse** button.



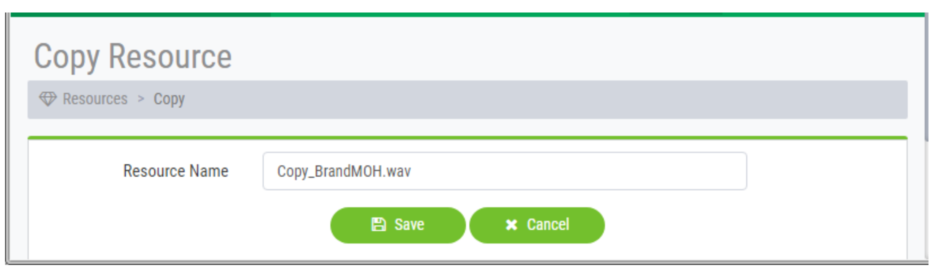
7. In the dialog box that opens, navigate to the file in your system and click **Open**.
8. The dialog box closes, the File field displays the path and file name of the uploaded file, and the Resource Name field displays the file name.
9. Click **Save** to overwrite the original resource with your changes.

Copying a Resource File

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

To copy a resource file:

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

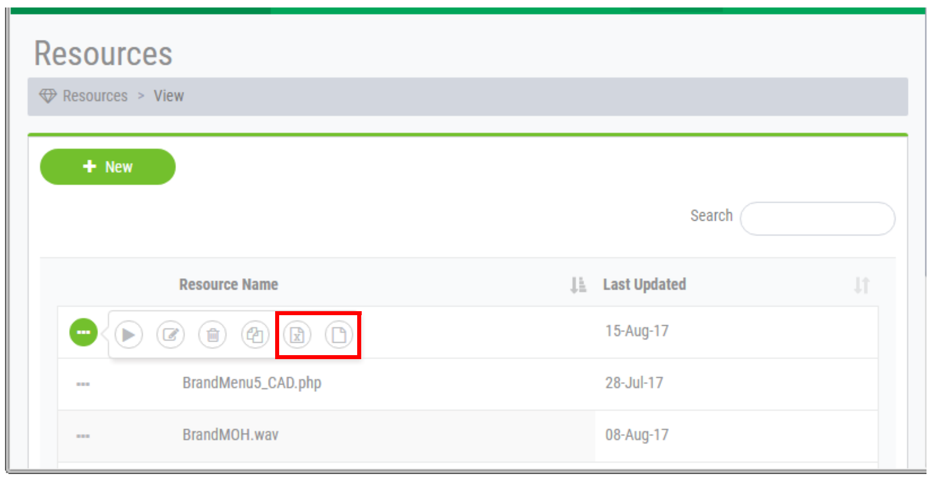


Exporting the References to a Media File

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

To view or export the references to a media file:

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



Viewing, Creating, Modifying, and Deleting Routing Strategies

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

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

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

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

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

Topics covered in this section:

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

Viewing Routing Strategies for an Entry Point or Queue

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

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

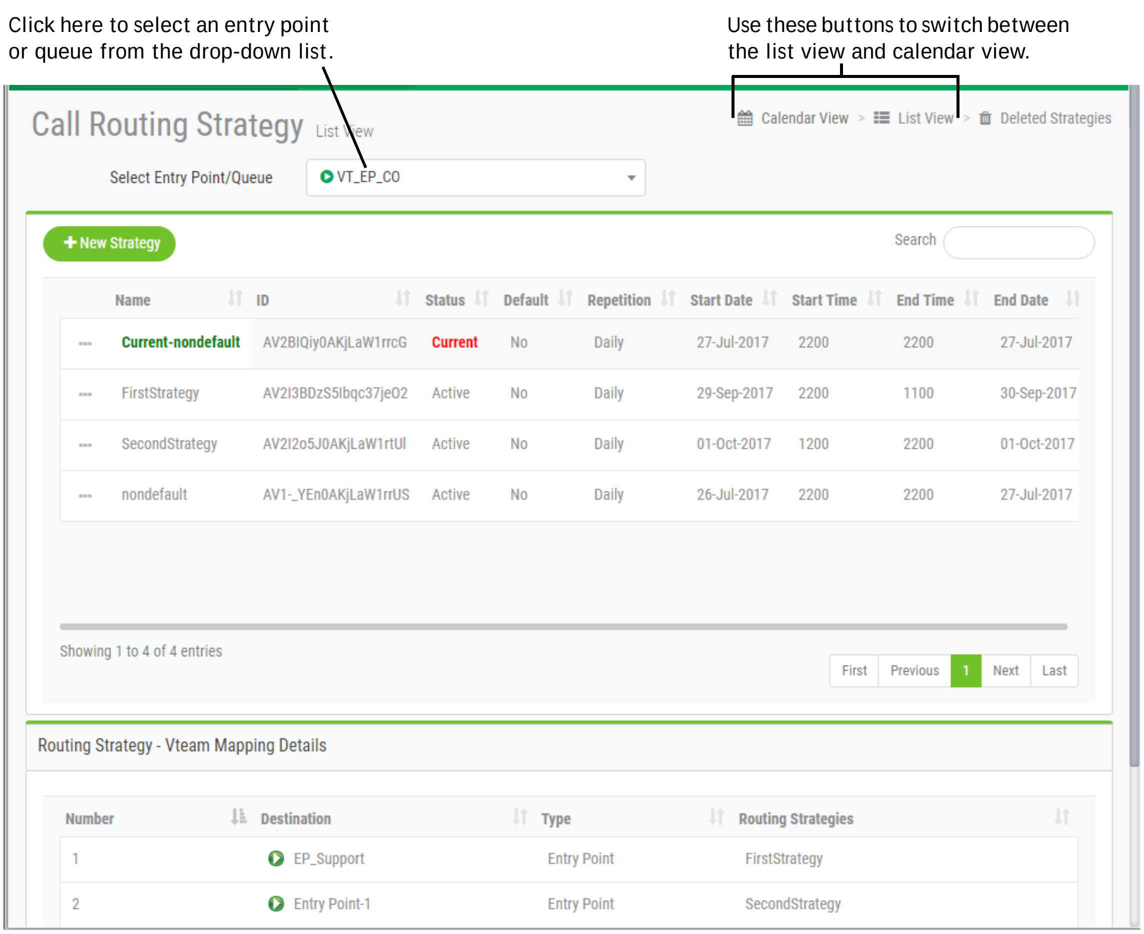
   The Routing Strategy page appears, displaying one of two possible views: calendar view or list view. Use the buttons beneath the menu bar on the right or left side of the page (depending on the width of your browser window) to switch between these two views.

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

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

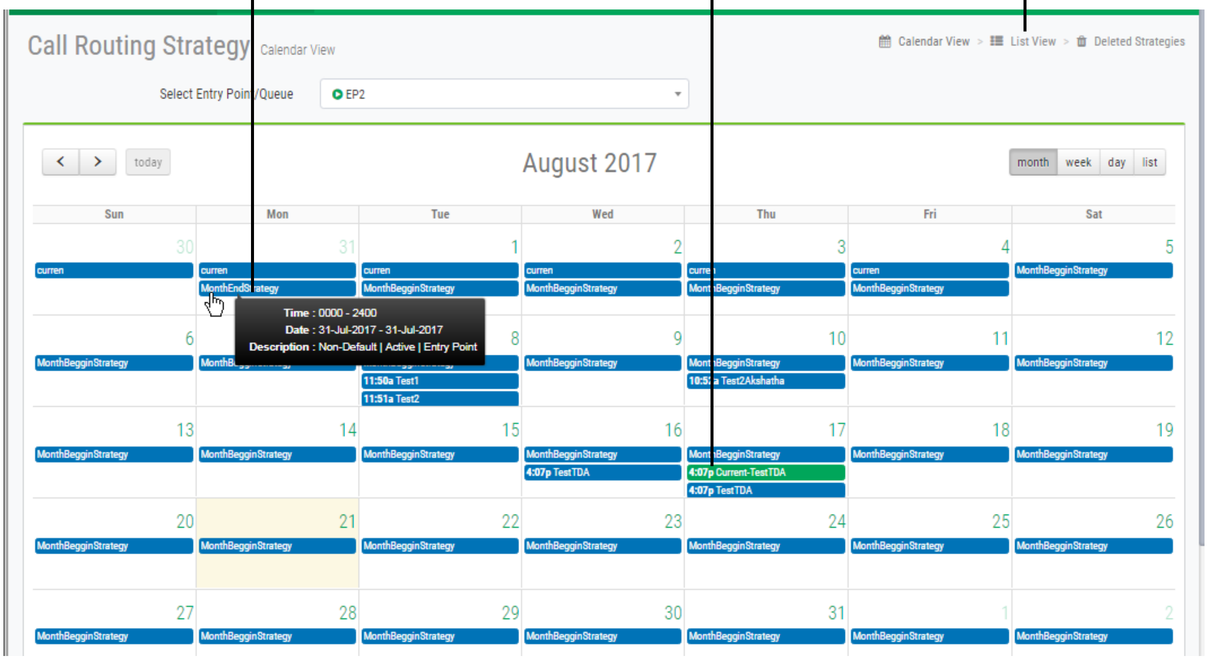
   - entry point
   - cross-ACD entry point
   - outdial entry point
   - queue
   - proxy queue
   - outdial queue

   The list view is shown in the following illustration.

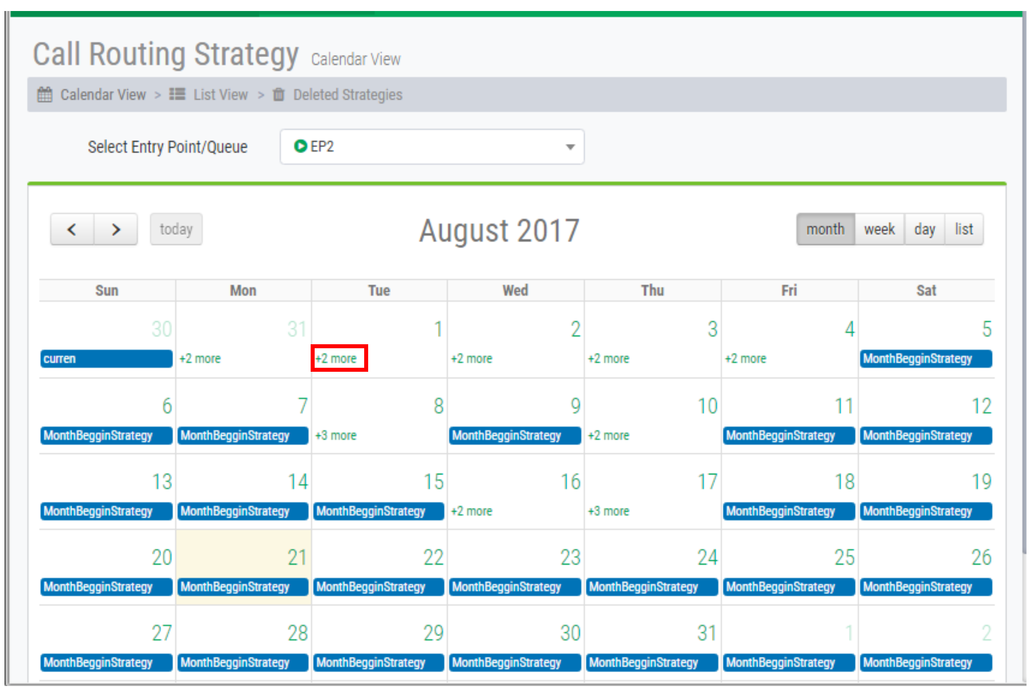


Calendar View

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



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



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

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

List View

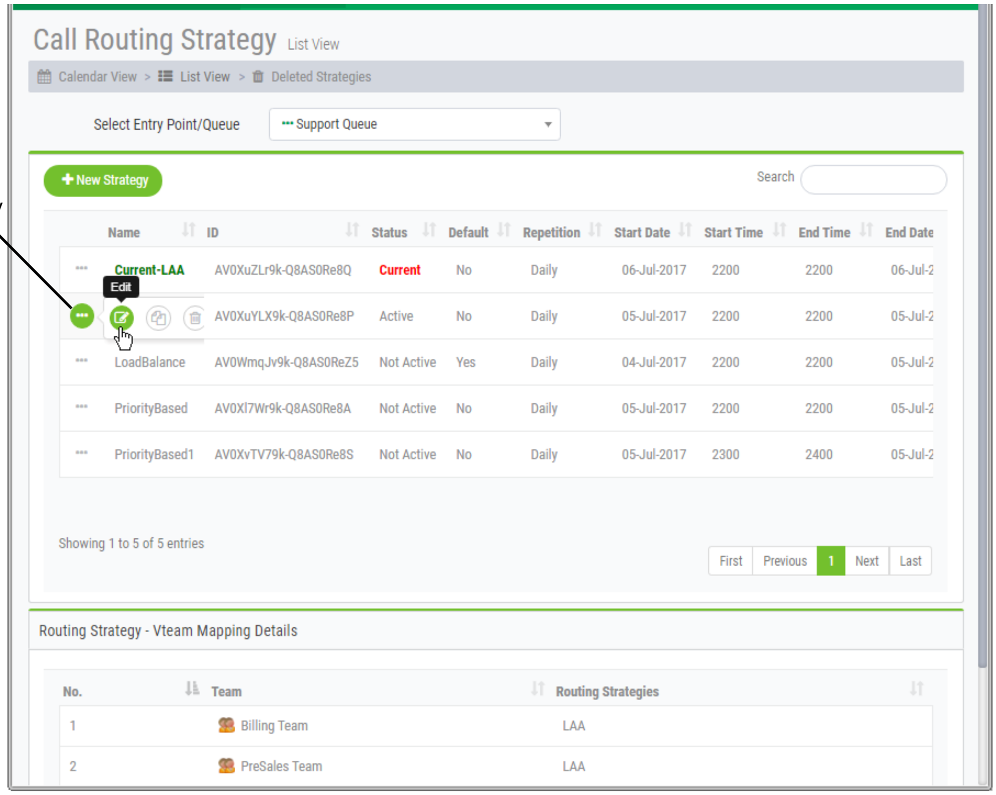
The upper section of the list view displays a table listing all routing strategies available for the selected entry point or queue. To see details for a strategy, click the ▪▪▪ button to the left of the strategy and select **Edit**.

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

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

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

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



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

Column	Description
Name	The name assigned to the strategy when it was created. You cannot change the name after the strategy has been created.
ID	The identification number of the strategy. This number is automatically assigned by the system.
Status	Indicates the status of the strategy. • **Current** means this is a snapshot of the currently running strategy. You cannot copy the current strategy, but you can modify any setting that does not affect execution time or date. Changes to the strategy do not affect the recurring scheduled version of the strategy. **IMPORTANT:** You can delete the current strategy, but *do not delete it before creating a different strategy for the same time interval*. If you delete a strategy without having another one in place, the last strategy used by the system becomes the “default strategy” even though the times and dates specified have expired. If this occurs, either create a new strategy for the current time period, or copy the default strategy and correct the time settings. • **Active** means the strategy will become effective at the specified start time on the specified start date. This is the default status. • **Not Active** means the strategy will not become effective regardless of the specified start time and date. This status lets you save a strategy for future use or as a draft to continue working on later.

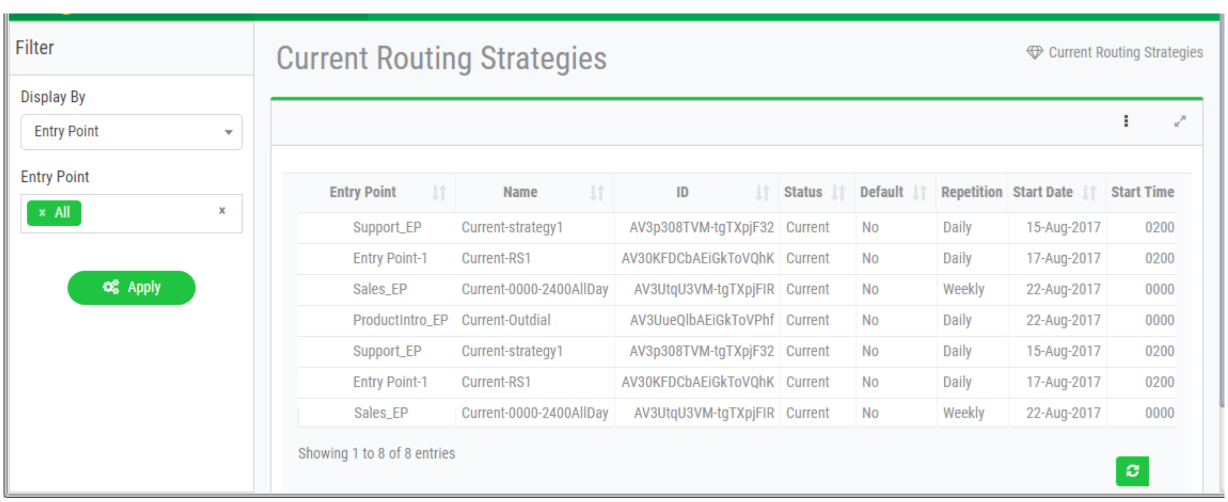
Column	Description
Default	Indicates whether the strategy is the default. A strategy that is *not* flagged as the default overrides a default strategy and is used as an exception to the default schedule.
Repetition	Specifies whether the strategy is scheduled to be repeated daily or only on specific days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

Viewing a List of Currently Deployed Routing Strategies

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

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

   Details about the current routing strategies for the selected entry points or queues are listed in the table on the right side of the page. The table includes the columns described in "List View" beginning on page 149 plus a "Control Script" column that displays the names of the call control scripts associated with the listed entry points or queues.

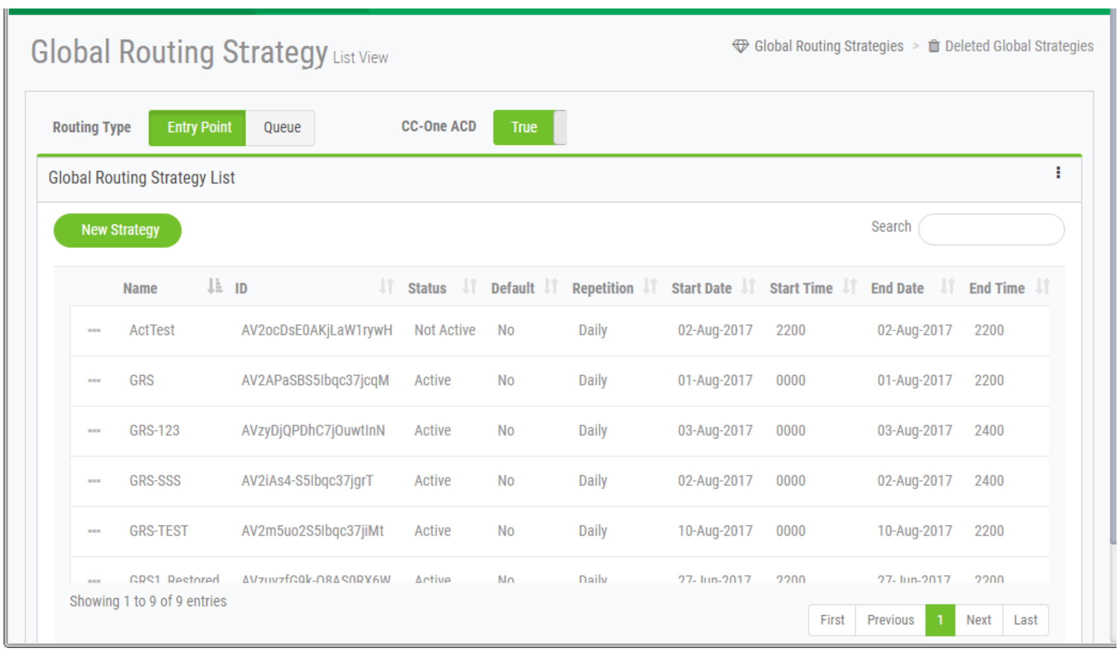


Viewing Global Routing Strategies

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

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

   The page displays a list of all global routing strategies available for the selected entry point or queue. For a description of each column in the list, see the table beginning on page 150.
3. To export the data displayed in the table to a data analysis tool, click the ▪▪▪ button on the right side of the page and select **Excel** or **CSV**.
4. To display details for a specific strategy, click the ▪▪▪ button to the left of a listed strategy and select **Edit**.



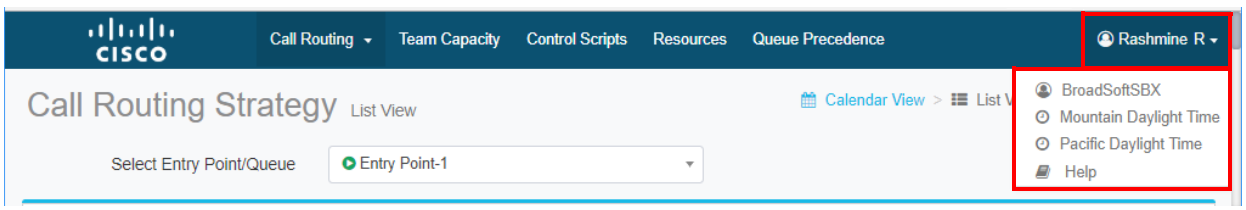
For more information, see "About Global Routing Strategies" on page 122. For how to create a global routing strategy, see "Creating a Routing Strategy" on page 154.

Understanding Time Values in Routing Strategies

Note: The Multiple Time Zone feature is not available in the CJP Salesforce Edition.

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

If an entry point or queue is provisioned with a time zone, the time zone is displayed beneath the enterprise time in the drop-down list that appears when you click your name button on the upper-right side of the routing strategy page as shown in the following illustration.

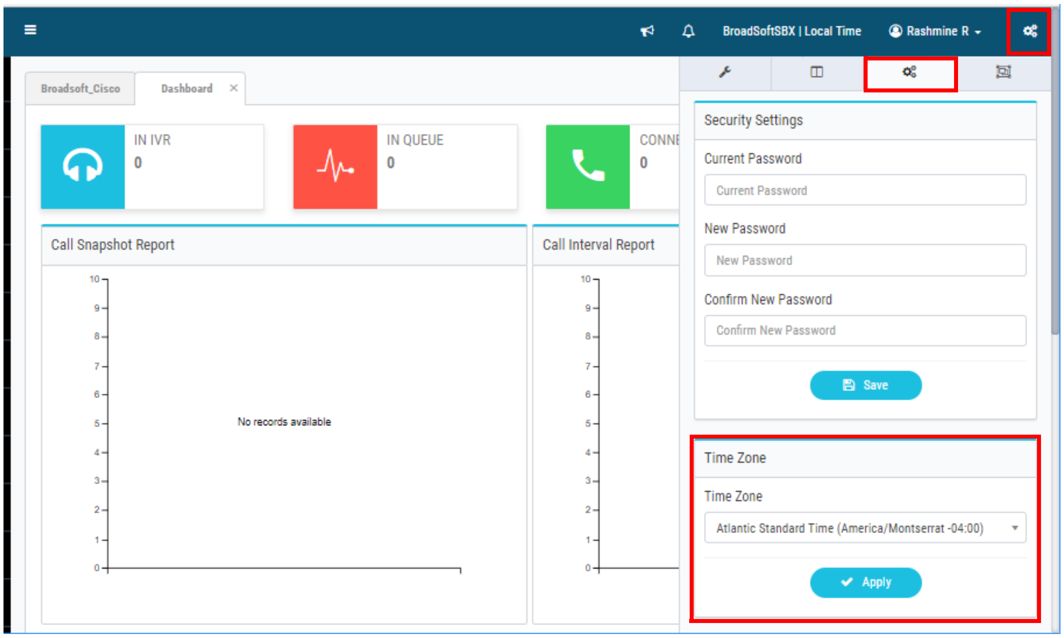


If the Multiple Time Zone feature is not enabled for your enterprise, time values in routing strategies are based on the time zone provisioned for your enterprise.

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

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

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



Creating a Routing Strategy

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

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

Note:

- You can create four types of routing strategies for standard CJP queues: *Agent Based*, *Load Balance*, *Priority Based*, and *Skills Based* (if your enterprise is provisioned with the optional Skills-Based Routing feature).
- You can create only one routing strategy for a proxy queue.

To create a routing strategy:

1. Open the **Routing Strategy** module.
2. Do one of the following:
   - On the Call Routing Strategy page that appears, make a selection from the **Select Entry Point/Queue** drop-down list.

     \- OR -
   - To create a global routing strategy, click the **Call Routing** button on the menu bar, select **Global Routing Strategies**, and select the **Entry Point** or **Queue** button on the upper-left side of the page.

     If you are creating a global routing strategy for cross-ACD entry points or for proxy queues, set the **CJP ACD** field to **False.**
3. Do one of the following from the list view:
   - Click the **New Strategy** button.

     \- OR -
   - Click the ••• button to the left of a listed strategy and select **Copy**.
4. Enter or modify the settings as described in the following table and then click **Save**.

   In the following table, asterisks (*) mark settings that are available only for standard CJP queue routing strategies.

Setting	Description
General Settings	
Name	Enter a descriptive name for the strategy, such as *US Holiday* or *Weekends*. You cannot edit this field after the strategy has been saved.
Status	Select **Active** if you want the strategy to become effective on the start date you specify in the *Start Date* field. Select **Not Active** if you want to save the strategy for future use or as a draft to continue working on later.

Setting	Description
Entry Points/Queues	This field appears only if you are copying a routing strategy or adding a global routing strategy. Select the entry points or queues that will be associated with this routing strategy.
Routing Type*	If this is a queue strategy, select a routing type (this setting is not available for proxy queues): • **Longest Available Agent.** Calls are routed to the agent who has been available for the longest time over all teams assigned to the strategy in the Call Distribution section. • **Load Balance.** Calls are routed to agents based on load-balancing conditions that you set in the Mode and Type fields and in the settings specified in the Call Distribution section. • **Priority Based.** Calls are routed to agent teams based on a priority scheme that you set in the Call Distribution section. • **Skills Based.** Calls are routed to agents based on skill requirements specified in the Call Distribution section of the routing strategy for the entry point that sends calls to this queue. The Skills Based routing type is available only if your enterprise is provisioned with the optional Skills-Based Routing feature. When you select *Skills Based* as the routing type, two additional settings appear for you to specify how to route a call when more than one agent with the required skill set is available: – **Longest Available Agent**. The call will be routed to the agent who has been available the longest. – **Best Available Agent.** When you select this setting, a **Skill** drop-down list appears. The call will be routed to the agent with the highest proficiency in the skill you select in the drop-down list.
Mode*	If you specified *Load Balance* in the *Routing Type* field, select one of the following values to specify how the call load will be handled: • **Percentage.** Calls are routed to selected teams based on a percentage allocation that you specify for each team in the Call Distribution section. The percentage spread total must equal 100 across all teams selected for Group 1. See "Specifying Call Distribution Settings" on page 166 for more information. • **Number.** Calls are routed to selected teams based on the value you specify for each team in the Call Distribution section. This value reflects the call capacity for that team. After the specified number of calls are sent to a particular team, no additional calls will be sent to that team. In other words, this strategy allows you to specify an upper limit on the total number of calls that are sent to a particular team. This allows you to meet any contractual obligations to not exceed certain targets.

Setting	Description
Type*	If you specified *Load Balance* in the *Routing Type* field, select one of the following values in the Type field: • **Dynamic.** Calls routed dynamically result in a single virtual queue. Callers queue for the longest available agent across all associated teams instead of being allocated immediately at the time of call arrival to a team specified in the load balance strategy (based on current call conditions). • **Static.** Calls are routed to specific teams on the basis of a predefined percentage or numeric allocation at the time of call arrival. In static routing, calls are assigned to a team based on the number of calls specified for that team in the Call Distribution section (either a percentage or number of calls). In dynamic routing, calls are assigned to a team based on the current allocation of calls among the teams based on the day's tally.
Time Settings (these are read-only for proxy queues)	
Start Date End Date	Click in each of these fields and use the calendar controls to specify the start date (the date the strategy will become effective) and end date (the date the strategy will expire).
Start Time End Time	Enter in 24-hour format (0000 to 2400) the time of day you want the strategy to start and end.
Day of Week	From the drop-down list, select **All Days** if you want to schedule the strategy for every day or **Weekdays** if you want to schedule the strategy for Monday through Friday only. -OR- Select each icon that represents a day on which you want to schedule the strategy.
Advanced Settings (not applicable to proxy queues)	
Music on Hold	Select the name of the audio (.wav) file to play for calls when they arrive or are waiting in queue. For more information, see "Audio on Hold" on page 196.
Maximum Time in Queue*	If this is a standard CJP queue routing strategy, enter the length of time, in seconds, after which a queued call should be distributed to the overflow destination number provisioned for the queue. Cisco recommends setting this to 1800 (30 minutes) or to three times the average queue length during busy hours. If this is an email routing strategy, set this to a very high value to avoid overflow. By default, this field is set to the value provisioned for the queue. **IMPORTANT:** The cumulative total queue time specified for all groups in the Call Distribution section of the routing strategy should not be greater than the value specified here. See "Specifying Call Distribution Settings" on page 166 for more information.

Setting	Description
Retries within the Team*	If this is a standard CJP queue routing strategy, specify the maximum number of times an attempt will be made to send a call to a team before the call is routed to the next available team. No further attempts will be made to send the call to that team again. **Exceptions:** • This setting does not apply to skills-based routing strategies. For skills-based routing, if the call is in the last group, the call overflows if no matching agent is found. If the call is in any other group, and if it is sent to an agent who does not answer, the system will continue to try other matching available agents any number of times, without regard to this setting. • In a load balance strategy using percentage allocation, a call is not distributed to a second team when the first team is unavailable. Instead, the system retries the first team’s DN for the number of times specified for the strategy and then overflows the call.
Flag as Default Routing Strategy -or- Update as Default Routing Strategy	This setting is available only if you are creating a new strategy or copying an existing one. Set to **Yes** if you want this to be the default routing strategy for the specified time interval for this entry point or queue. Set to **No** if you are creating an exception to the default schedule, such as a holiday. A strategy that is *not* flagged as default overrides the default strategy. That is, the system first checks for a strategy that is *not* flagged as default, and if none exists, the default strategy is used.
Call Control	
Select a call control script from the drop-down list. Every strategy must have a control script associated with it, which defines how calls are handled. If appropriate, change the script’s default parameters in the fields displayed. For more information, see the next section, “Assigning Call Control Scripts and Parameters.” **Caution:** If you are editing an existing strategy, selecting a different call control script can significantly change how calls are handled. It is important that you are clear on what you want to do before changing scripts or script parameters. If this is an entry point strategy for skills-based routing, assign skills requirements as described in “Assigning Skill Requirements to Incoming Calls” on page 163.	

Setting	Description
Call Distribution* (not applicable to proxy queues)	
If this is a standard CJP queue routing strategy, specify which teams you want to associate with this strategy and organize them into groups. See “Specifying Call Distribution Settings” on page 166 for details. In addition, do the following (as described in “Assigning Teams and Skill-Relaxation Settings to Groups” beginning on page 168): • If the routing type is *Load Balance*, assign percentage spreads or capacities to each team in Group 1. You can add additional groups, but you cannot assign percentage spreads or capacities to the teams in those additional groups. • If the routing type is *Priority*, assign priorities. Note that a specific priority can be assigned to only one team within the strategy (for example, only one team can have a priority of 1 assigned to it). • If the routing type is *Skills Based*, specify skill relaxation settings if appropriate. If this is a routing strategy for an outdial queue, you must specify a team in the Call Distribution section. The specified team is only a placeholder and will not be used. In addition, be sure to create only one group for an outdial queue routing strategy.	
Business Metrics & Queue Escalation (applicable only to cross-ACD entry points)	
If this routing strategy is for a cross-ACD entry point, organize the queues that will be served by the entry point into one or more groups and specify the call routing algorithm and applicable parameters as described in “Specifying Call Distribution for a Cross-ACD Entry Point” on page 174.	

Assigning Call Control Scripts and Parameters

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

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

If your enterprise uses the optional Skills-Based Routing feature, the Call Control settings for an entry point strategy can also include controls for specifying skill requirements for calls that arrive at the entry point, as described in "Assigning Skill Requirements to Incoming Calls" on page 163.

Note the following:

- Before you can assign a custom control script, it must be uploaded to the CJP system (see "Uploading a Custom Control Script" on page 137).
- After a control script is available for selection, it can be assigned to new or existing routing strategies.
- If a control script is modified after being assigned to a routing strategy, it must subsequently be reassigned to the routing strategy. For more information, see "Copying or Modifying a Call Control Script" on page 136 and "Updating a Custom Control Script" on page 139.

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

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

1. Open the **Routing Strategy** module and on the Call Routing Strategy page, display the list view.
2. Select an entry point or queue from the **Select Entry Point/Queue** drop-down list.
3. Do one of the following:
   - To create a new strategy, follow the instructions in "Creating a Routing Strategy" on page 154, and then return to this procedure for instructions on assigning a control script to the strategy.
   - To assign a control script to an existing strategy do one of the following: from the list view, click the ▪▪▪ button to the left of the listed strategy you want to modify and select **Edit**; or, from the calendar view, click the link to the strategy.

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

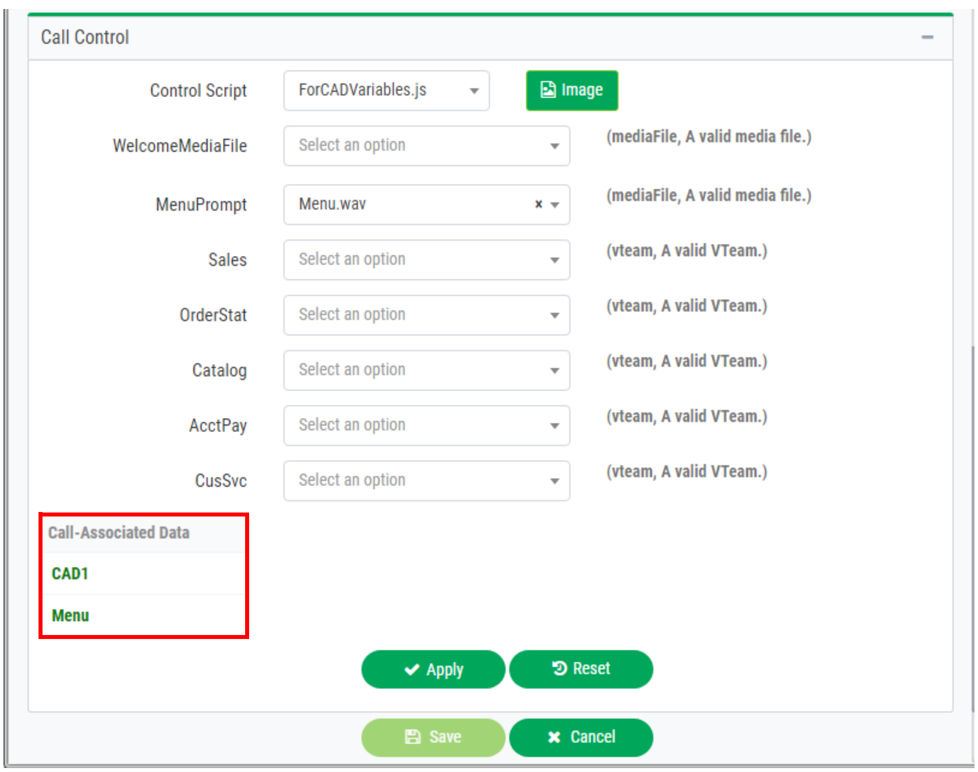
   The configurable parameters for your selection are displayed beneath the control script name. You must set a value for every parameter.

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

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

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

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



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

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

6. If the control script uses skills-based routing, a **Manage** button is displayed to the right of the Reset button. For details about adding skill requirements to a routing strategy, see "Assigning Skill Requirements to Incoming Calls" on page 163.

7. Click **Apply** to apply your control script and parameter settings.

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

Assigning Skill Requirements to Incoming Calls

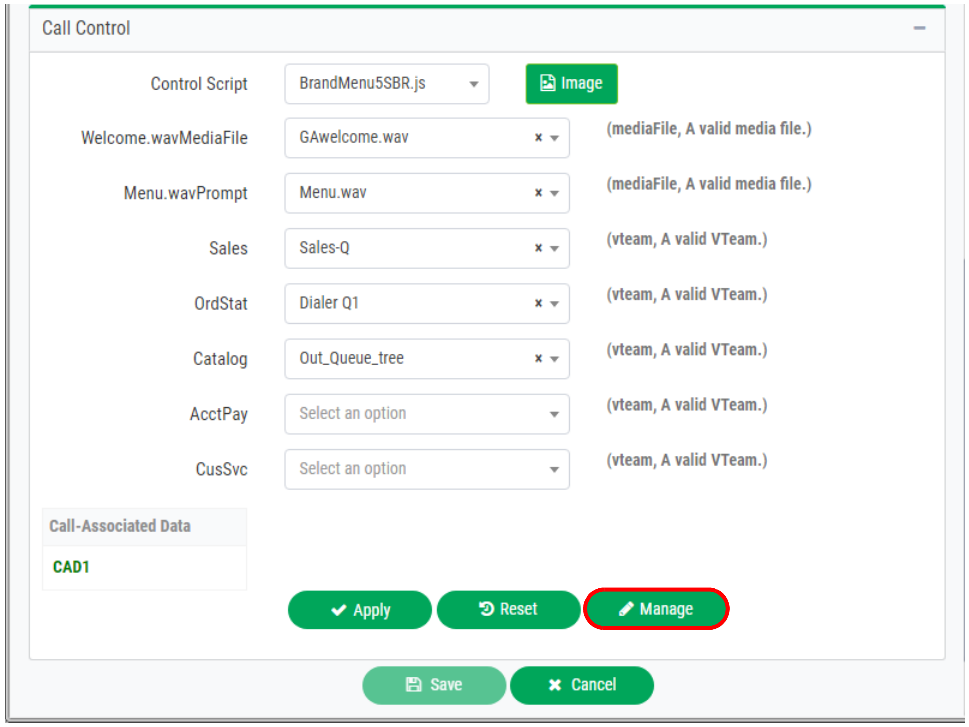
Skills-based routing is an optional CJP feature that matches the needs of callers with agents who have the skills to best meet those needs. When calls arrive at an entry point, they are assigned skill requirements based on call paths specified in the call control script associated with the routing strategy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

To assign skill requirements to incoming calls:

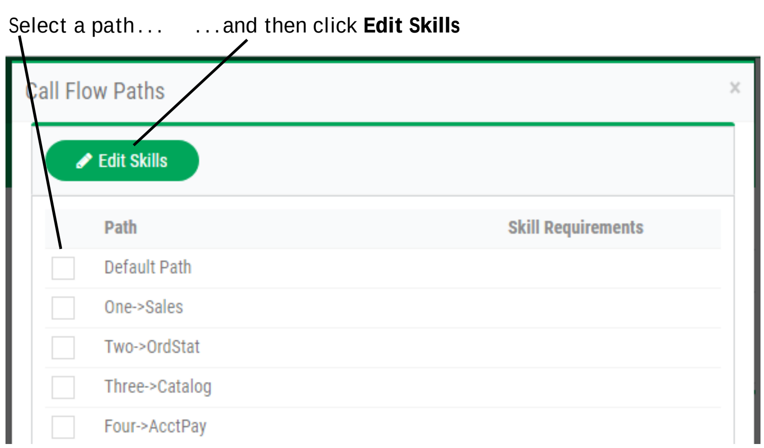
1. Display the routing strategy page for the entry point to which you want to assign or modify skill requirements.

2. In the **Call Control** section of the page, select the appropriate call control script and set any parameters as described in "Assigning Call Control Scripts and Parameters" on page 161.

3. Click the **Manage** button to display the **Call Flow Paths** window.



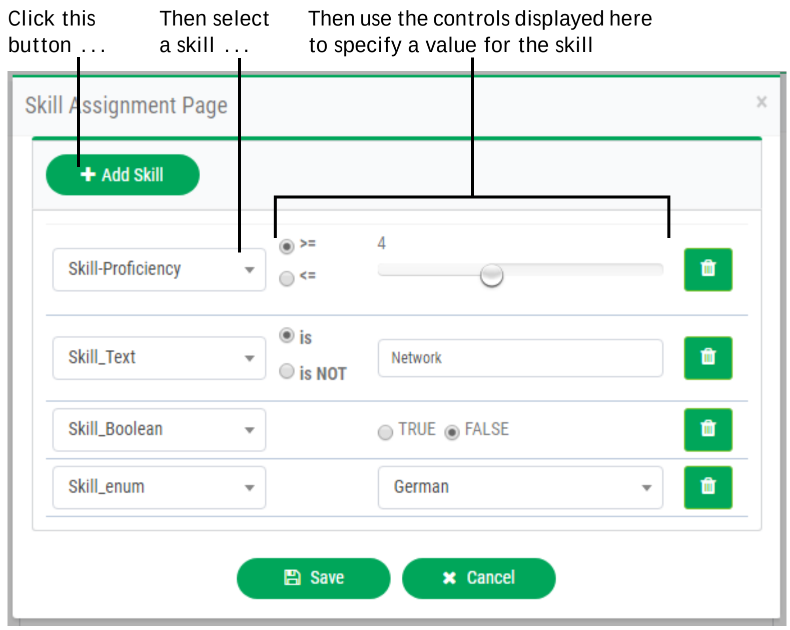
4. Click the check box to the left of a call path for which you want to assign skills, and then click the **Edit Skills** button.



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

   The controls for assigning a value to the skill vary depending on the skill type. The four skill types are shown in the following illustration and described in the table that follows. (For more information about skill types, see “About Skills-Based Routing” on page 115.)

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



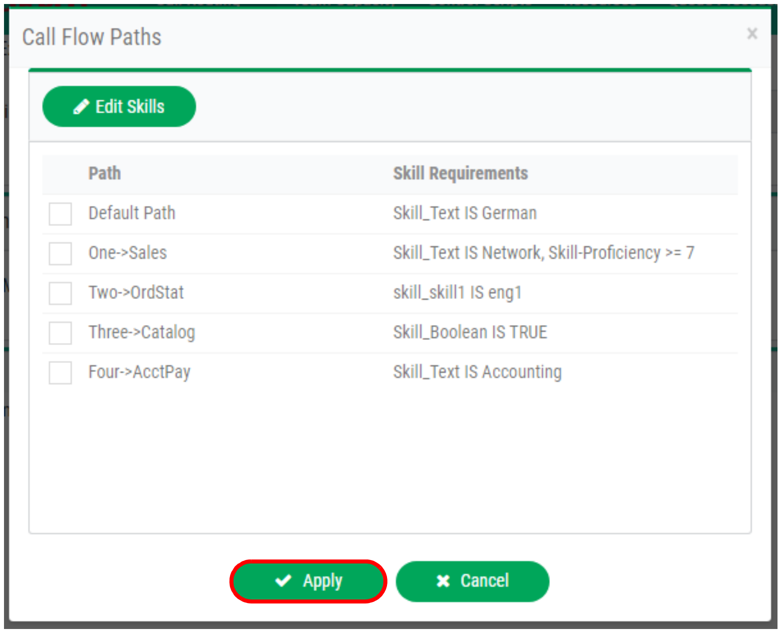
Skill Type	Description
Proficiency	Select the **>=** (greater than or equal to) button or the **<=** (less than or equal to) button, and then drag the slider to the right or left to assign a value between 0 (lowest) and 10 (highest) that represents the required level of expertise in the skill.
Boolean	Select **True** or **False** to indicate whether the agent handling the call is required to have or required not to have this skill.
Text	Enter a value in the text box and select the **is** or **is NOT** button to indicate whether the agent handling the call must have or must not have a matching value.
Enumeration	Select a value from the drop-down list.

6. To add another skill requirement for the selected path, repeat the previous step. To delete a skill requirement mapping, click the Delete button to the right of the setting for that skill.

7. When you are finished adding skill requirements for the selected path, click the **Save** button to save your changes and close the **Skills Assignment Page**.

8. To add skill requirements for another path, start again at step 4.

9. When you are finished, click the **Apply** button at the bottom of the **Call Flow Paths** window.



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

Specifying Call Distribution Settings

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

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

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

If a team is assigned to groups in the routing strategies for more than one queue, the system routes a call to that team based on whichever queue (1) has that team earliest in its priority-based routing strategy and (2) has had a call waiting in queue the longest.

Optionally, you can use the queue precedence function to assign the order in which calls are routed from queues to teams on a per team basis as described in "Specifying Queue Precedence" on page 195.

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

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

Topics covered in this section:

- About Team Types
- Assigning Teams and Skill-Relaxation Settings to Groups
- Editing a Group of Teams or Skill Relaxation Settings
- Deleting a Group of Teams or Skill Relaxation Settings

About Team Types

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

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

  The capacity of these teams is based on the provisioned team capacity setting, which can be overwritten by team capacity strategies (see "Scheduling Team Capacity" on page 190). If the team's actual capacity is higher than the value currently being used by the system, agents could be left with no calls to handle, and vice versa, making strategy design more challenging.

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

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

Assigning Teams and Skill-Relaxation Settings to Groups

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

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

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

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

To create a group:

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

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

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

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

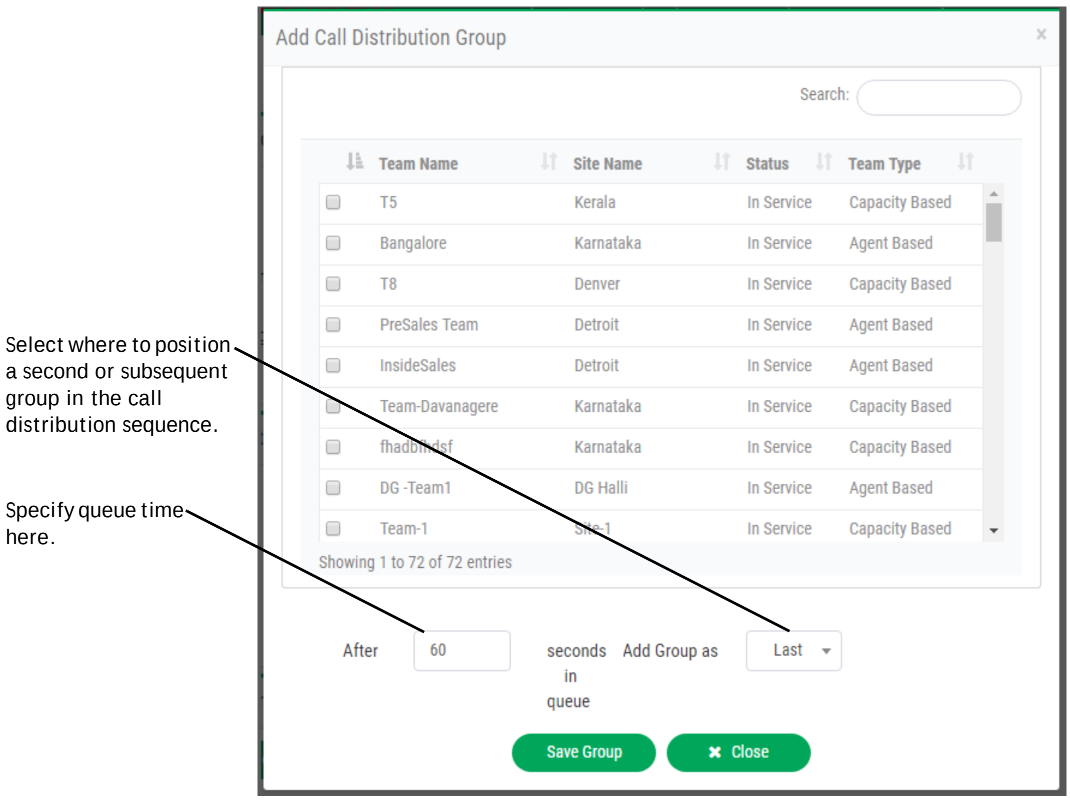
4. If you are creating a group for a *priority-based* strategy, assign a priority to each team in each group by making selections from the drop-down list in the **Priority** column. Note that priorities are assigned across groups.

5. Click **Save Group** to save the group.

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

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

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



7. If you are creating a group for a *skills based* strategy, you can specify skill-relaxation settings to remove or reduce some or all of the skill requirements assigned to the calls after a specified queue time. To do so, you must know exactly which skill requirements were assigned to the calls in the routing strategy for the entry point that sends calls to this queue (see “Assigning Skill Requirements to Incoming Calls” on page 163).

To specify skill-relaxation settings:

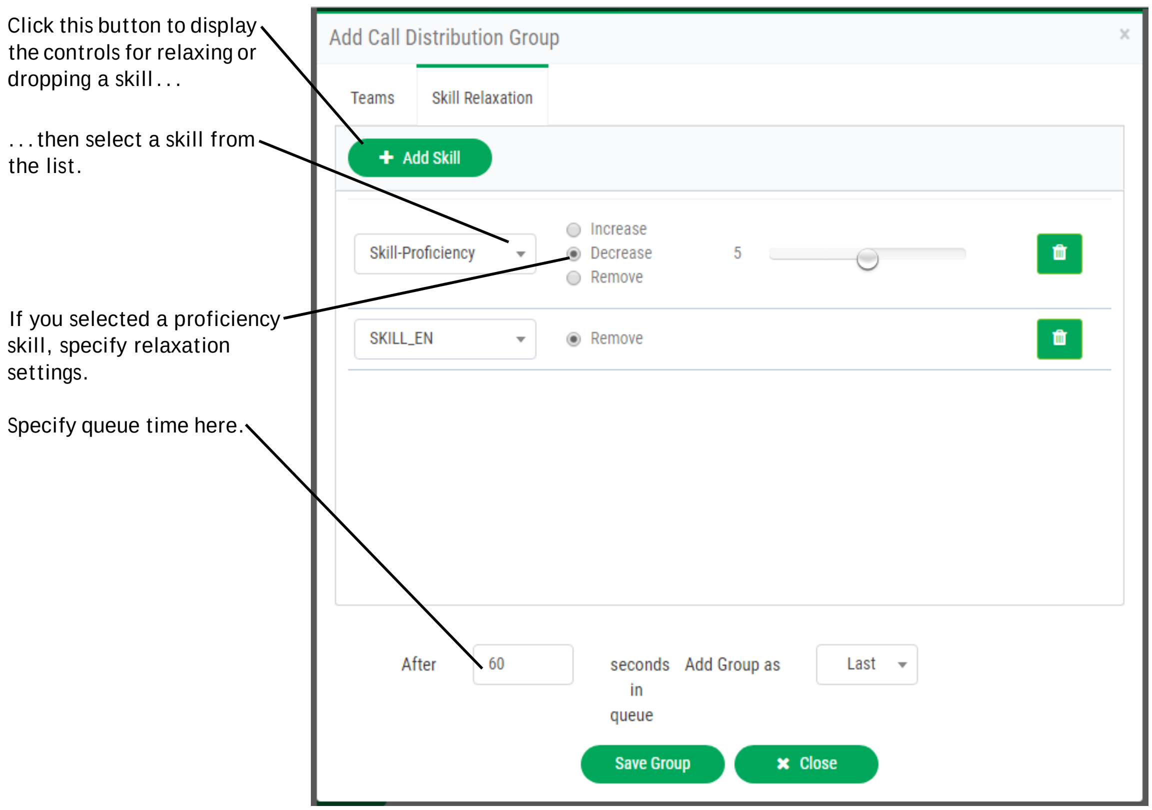
a. Click the **Skill Relaxation** tab at the top of the Add Call Distribution Group page and then click the **Add Skill** button. You can click this button multiple times to display relaxation settings for multiple skills.

To delete a displayed setting, click Delete button to the right of the setting.

b. Select a skill from the drop-down list.

c. If you selected a proficiency skill, select an option to indicate whether you want to increase, decrease, or remove the skill. If you selected **Increase** or **Decrease**, drag the slider to change the skill-level setting.

d. Specify queue time as described in the next step.



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

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

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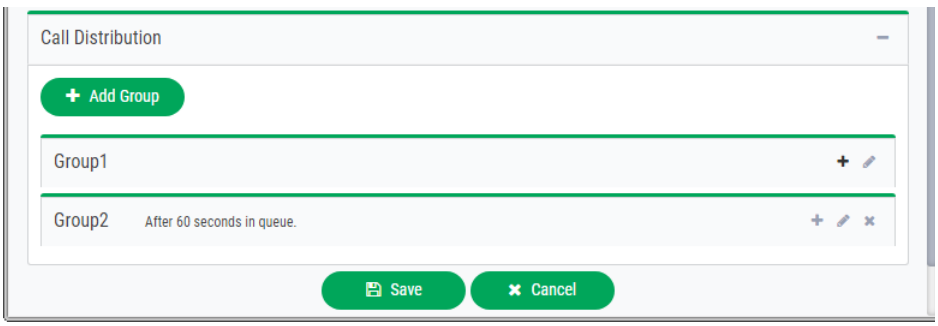
9. Click **Save Group**.

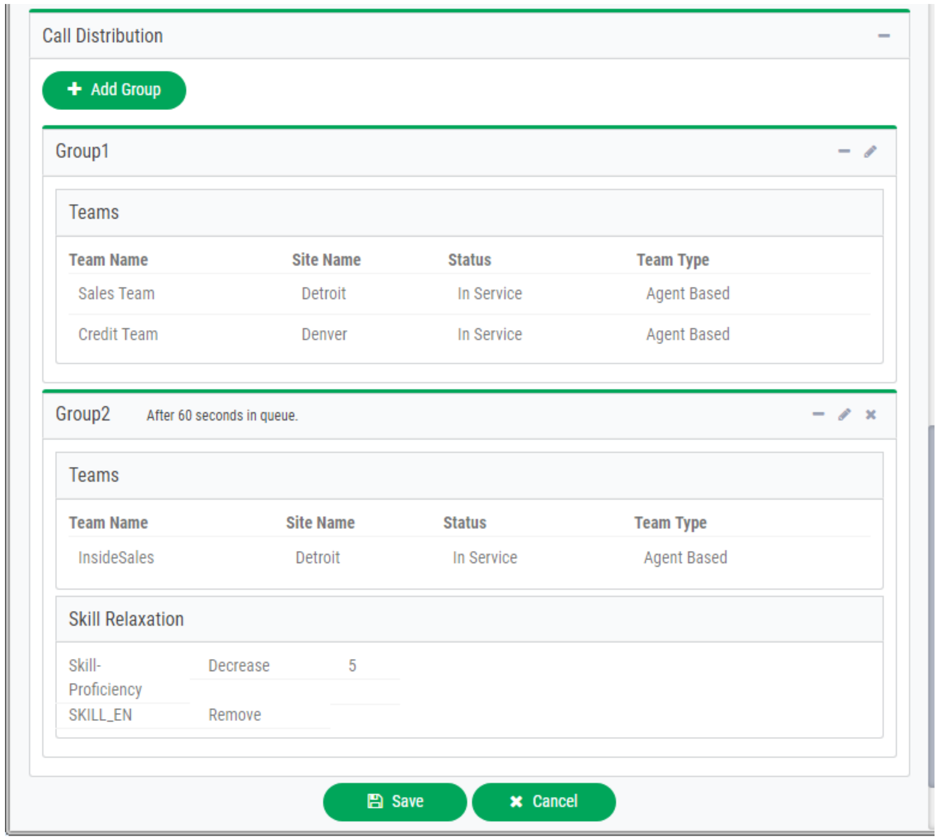
10. To create another group, start again at step 6.

11. After you have created all the groups you want, click **Close**. The Call Distribution section displays a Group header for each added group. Each header displays two or three buttons on the right side:

    - Click ➕ to expand a group section so you can see the settings for the group.
    - Click ✏ to open a dialog box where you can edit the group's settings.
    - Click ✖ to delete the group. This button is not displayed on Group 1 because the strategy must have at least one group.



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



Editing a Group of Teams or Skill Relaxation Settings

To edit a group:

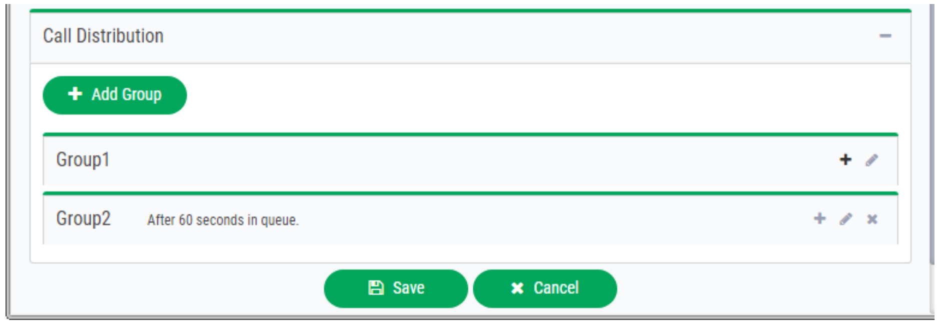
1. Display the Edit Routing Strategy page for the relevant routing strategy (see "Modifying a Routing Strategy" on page 186).

2. In the **Call Distribution** section, do one of the following:

   - Click the Delete button on the right side of the header for the group to delete the group. This button is not displayed on Group 1 because you cannot delete the first group.

   - Click the Edit button to open the Edit Call Distribution Group dialog box where you can edit the group's settings.

   - Click the **Add Group** button at the top of the Call Distribution section to create a new group, as described in "Assigning Teams and Skill-Relaxation Settings to Groups" on page 168.



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

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

4. After making your changes in the Edit Call Distribution Group dialog box, click the **Save Group** button and then click the **Close** button to close the dialog box.

5. Click **Save** at the bottom of the page to save the changes to the routing strategy.

Deleting a Group of Teams or Skill Relaxation Settings

To delete a group of teams:

1. Display the Edit Routing Strategy page for the appropriate routing strategy (see "Modifying a Routing Strategy" on page 186).

2. In the **Call Distribution** section, click the Delete ✖ button on the right side of the header for the group you want to delete.

3. Click **Save** to save this change to the routing strategy.

Specifying Call Distribution for a Cross-ACD Entry Point

Note: This feature is not available in the CJP Salesforce Edition.

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

- Organizing the queues that will be served by the entry point into one or more groups.
- Specifying the call routing algorithm and other parameters used to route calls under various conditions (for an overview, see "About CJP Scorecard Routing" on page 117).

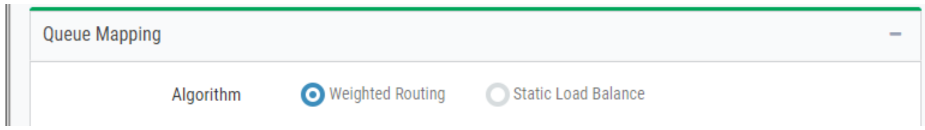
Topics covered in this section:

Specifying the Algorithm, Metrics, and Queue Groups

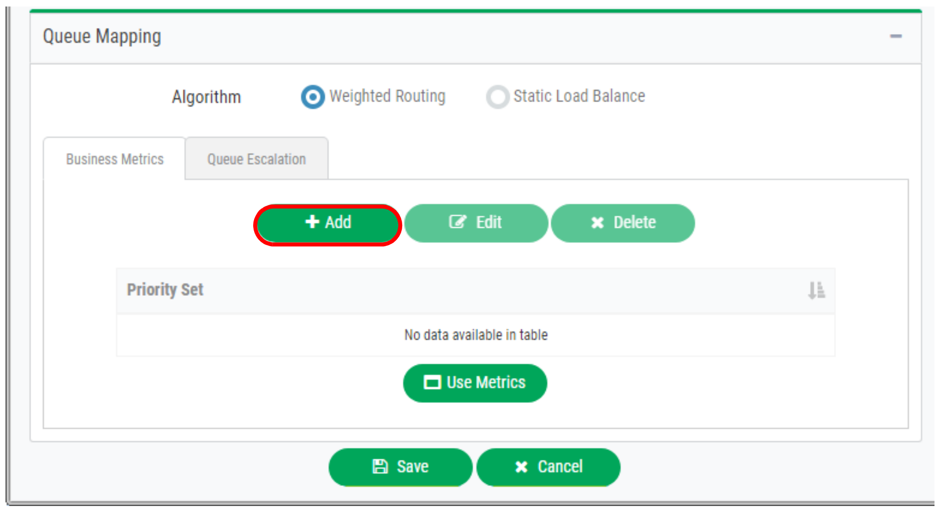
To specify the algorithm and queue escalation groups for a cross-ACD entry point:

1. Do one of the following:
   - To create a new strategy, follow the instructions in "Creating a Routing Strategy" on page 154, and then return to this procedure for instructions on specifying queue escalation.
   - To edit the queue escalation for an existing strategy do one of the following: from the list view, click the ▪▪▪ button to the left of the strategy you want to modify, and then click **Edit**; or, from the calendar view, click the link to the strategy.
2. In the **Queue Mapping** section of the page, select the **Algorithm** the system will use to determine which proxy queue to route calls to:
   - **Static Load Balance.** Calls will be allocated based on the load spread specified for the proxy queues, irrespective of current queue size or handle times. When this algorithm is selected, the *Business Metrics* tab is disabled and the only enabled settings in the *Queue Escalation* tab are those for creating and editing groups of queues and assigning a load spread (%) to each queue.

- **Weighted Routing.** Calls will be routed based on the weights specified for selected metrics within priority sets. When a call comes in, the weighted value of the metrics defined in the first priority set are computed for each queue. If multiple queues have equivalent values, a weighted value of the second priority set is computed. The call is routed to the queue with the best value.



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

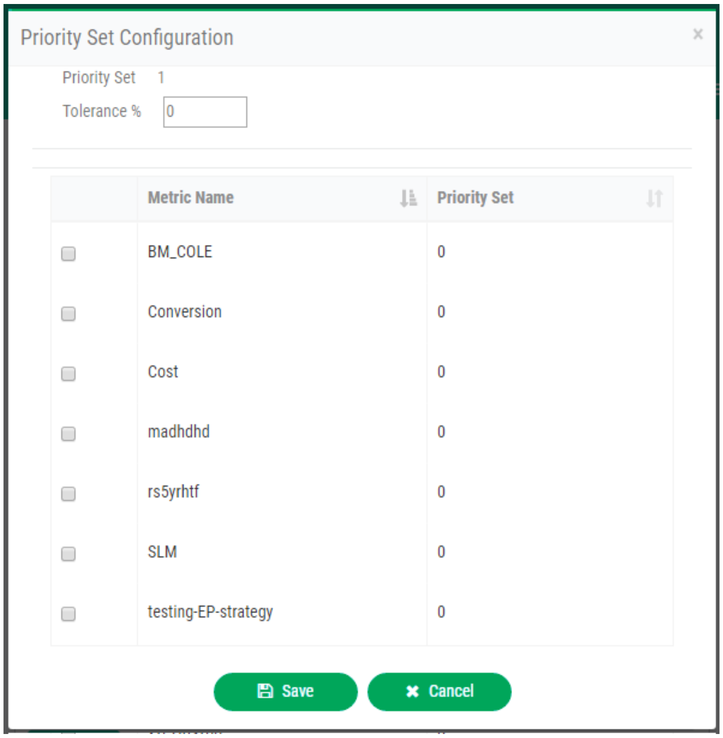


5. In the **Priority Set Configuration** dialog box that opens:

   a. Select the check box next to each metric you want to include in the priority set. A priority set must include at least one metric, and you cannot include the same metric in more than one priority set.

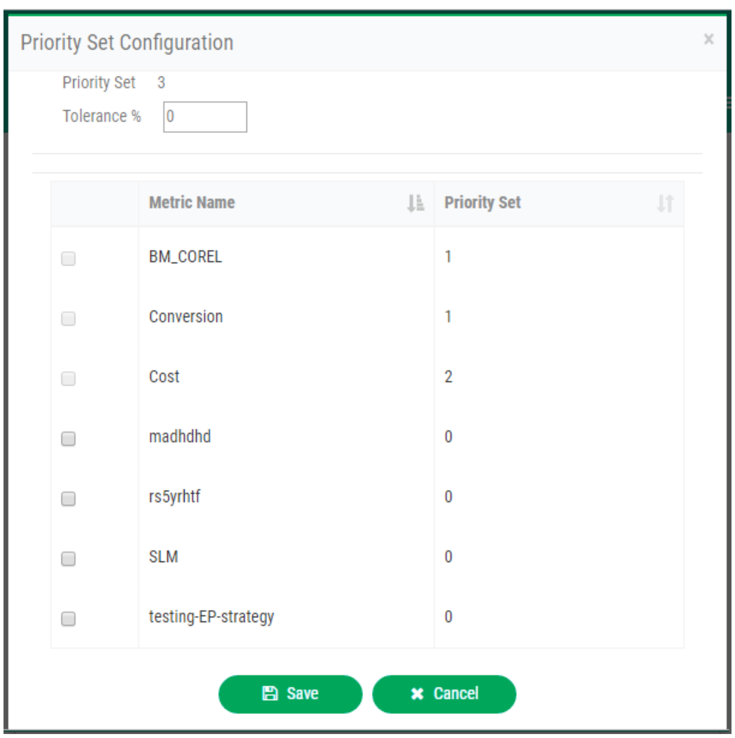
   b. Specify the **Tolerance %** for the set. When the metric values for two queues are compared, differences within the specified Tolerance percentage are ignored.

   c. Click **Save**.

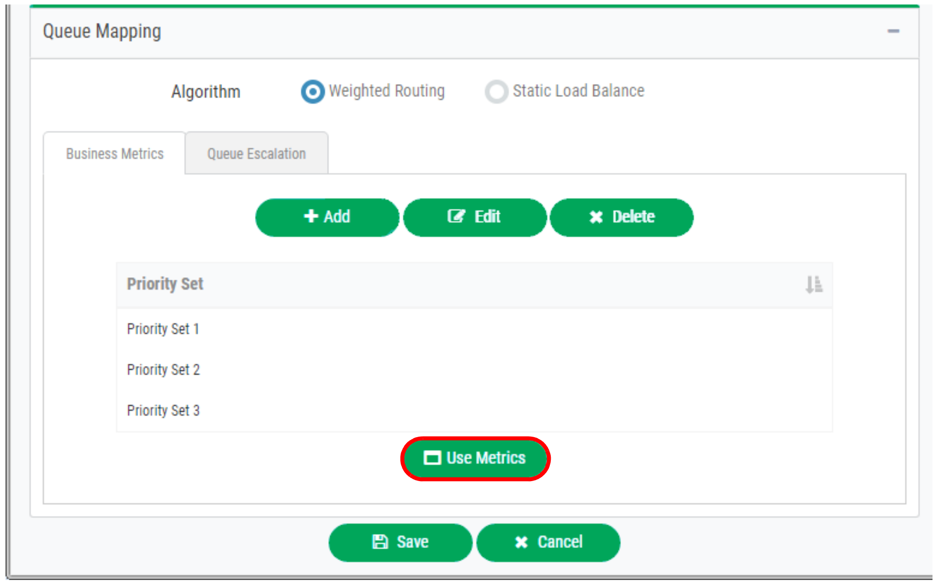


6. Repeat steps 4 and 5 for each additional priority set you want to define.

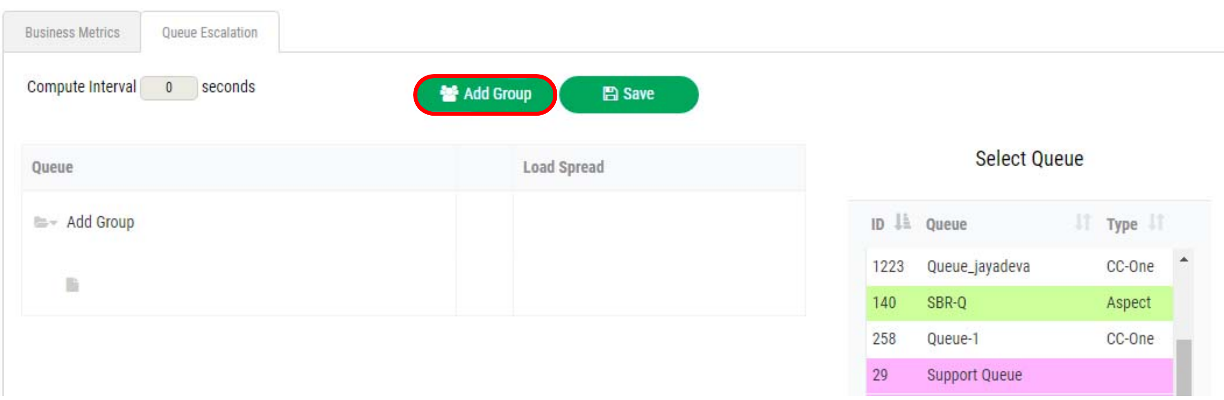
   If a metric is already included in a priority set, the number assigned to the priority set is displayed in the Priority Set column, and that metric cannot be selected.



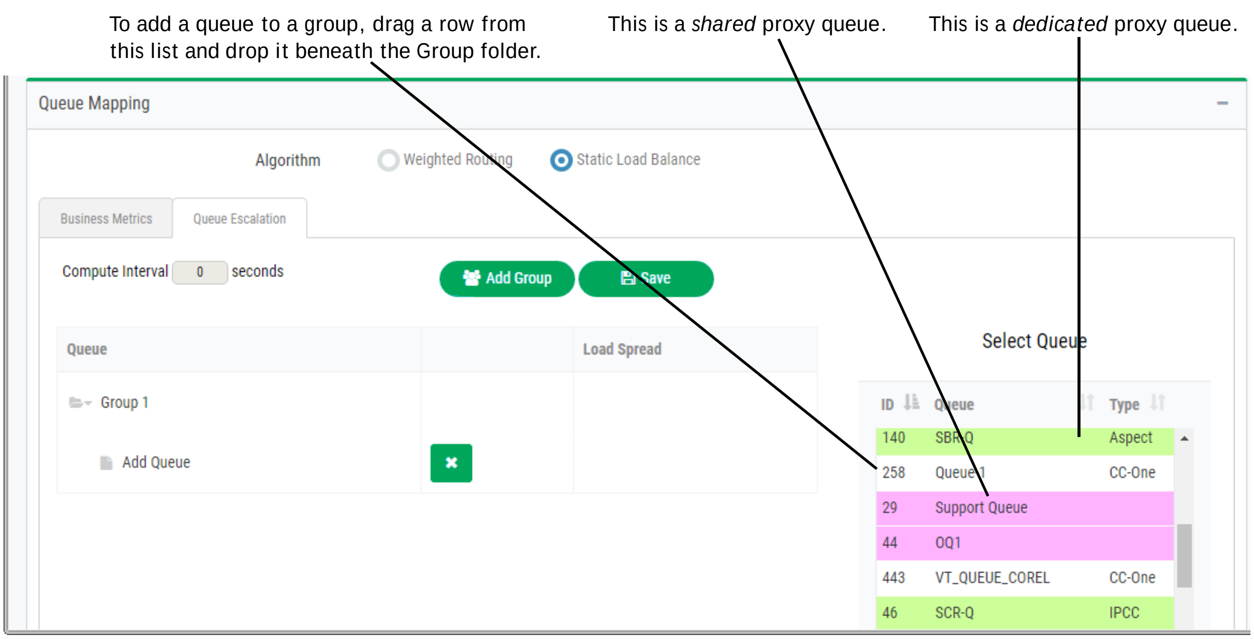
7. When finished, click the **Use Metrics** button at the bottom of the Business Metrics tab.



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



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



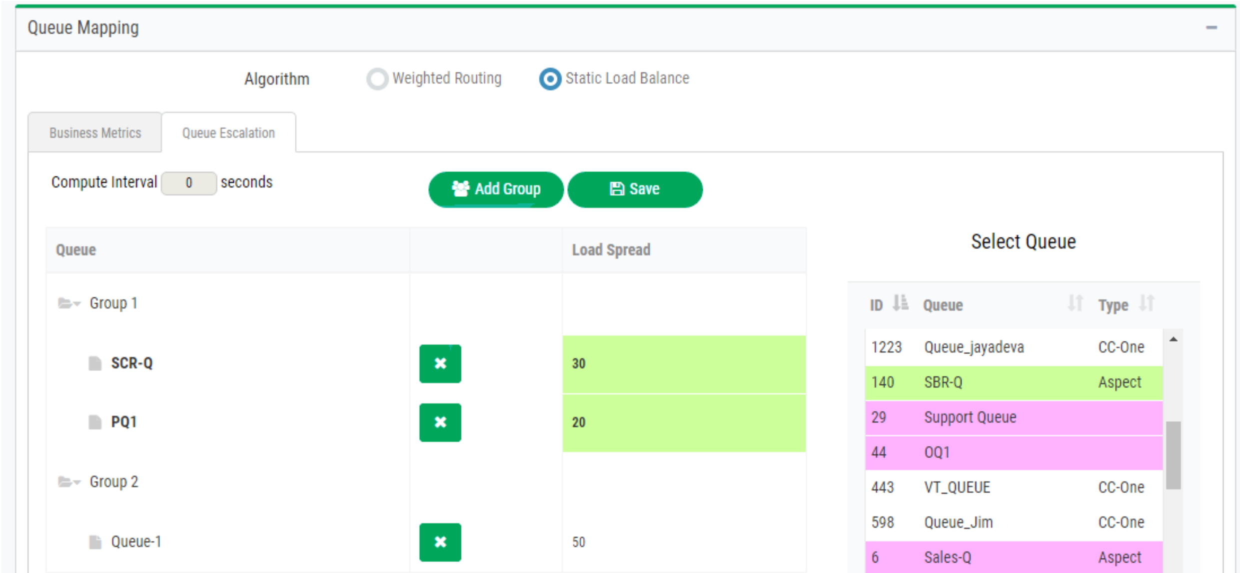
10. Specify the settings for each queue in the group as described in one of the following sections:

    - "Specifying Parameters for Static Load Balancing" on page 178
    - "Specifying Parameters for Weighted Routing" on page 179
    - "Using the Show Metrics and Simulate Buttons" on page 185

Specifying Parameters for Static Load Balancing

If *Static Load Balance* is the selected algorithm, after organizing the queues that will be served by the cross-ACD entry point into one or more groups (as described in "Specifying the Algorithm, Metrics, and Queue Groups" on page 174), specify the load spread as follows:

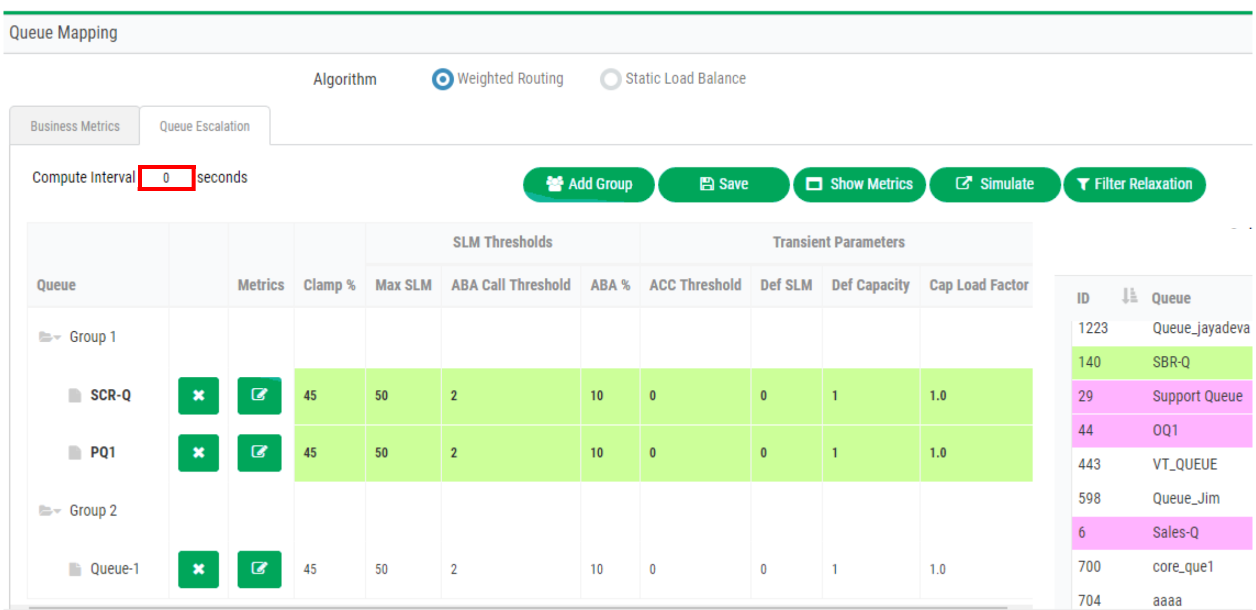
1. Enter a value from 1 to 100 in the **Load Spread** column for each queue. The total spread across all queues must equal 100%.
2. When you are finished specifying the load spread for each queue, click the **Save** button to the right of the **Add Group** button. Then click **Save** at the bottom of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



Specifying Parameters for Weighted Routing

If *Weighted Routing* is the selected algorithm for the cross-ACD entry point, after following the procedure described in "Specifying the Algorithm, Metrics, and Queue Groups" on page 174, specify the call routing parameters in the Queue Escalation tab as follows:

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

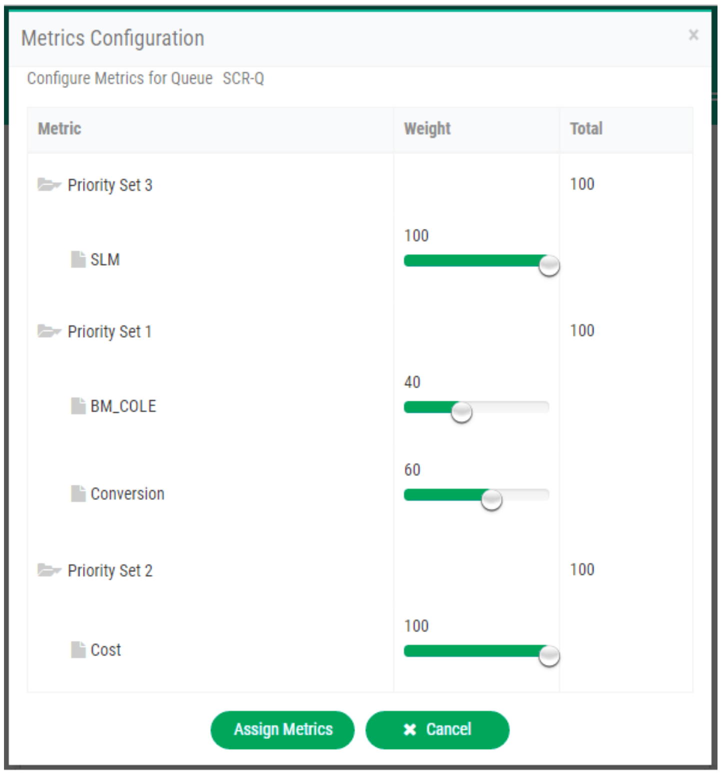


2. To specify a weight for each metric:

   a. Click the button in the **Metrics** column.

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

   c. Click **Assign Metrics** to save your settings.



To open a dialog box that displays the weights currently assigned to each queue in the routing strategy, or to simulate call distribution based on different weights, see "Using the Show Metrics and Simulate Buttons" on page 185.

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

Setting	Description
% Clamp	Enter a value from 1 to 100. The percentage of calls routed to this queue should not exceed the value specified here during the interval specified in the *Compute Interval* field. The total of the % Clamp values across all queues in all groups must equal or exceed 100%.

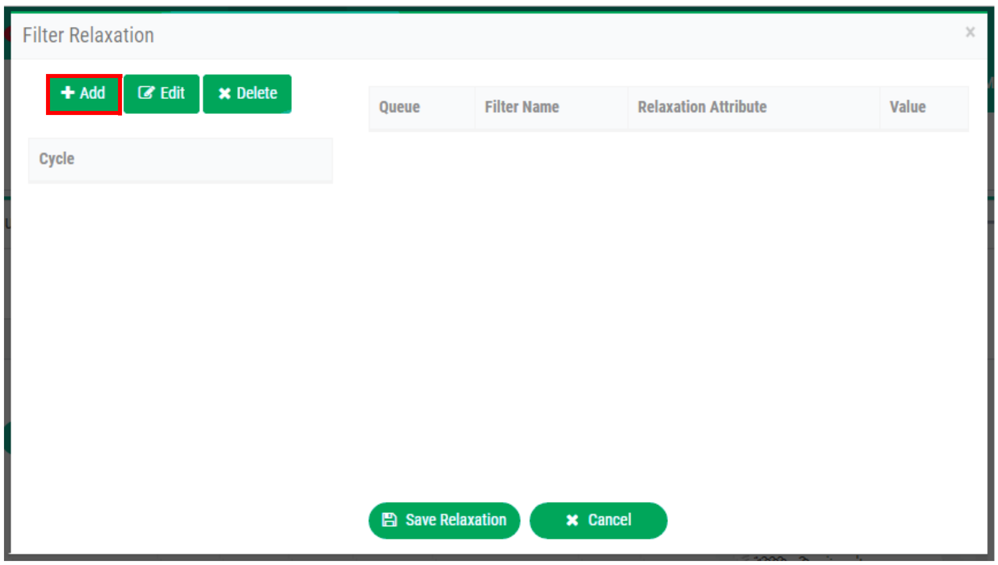
Setting	Description
Max Capacity Load Factor	Enter a multiple of the queue's *capacity* (which identifies the number of active agents currently handling calls for this queue). This setting determines how many active calls can be sent to the queue. For example, if the capacity of the queue is 14 and *Max Capacity Load Factor* is 1.5, then the routing engine will send a maximum of 21 active calls to this queue. In the case where the proxy queue's actual capacity is not being provided through a data feed, the routing engine will use a multiple of the queue's *Default Capacity* setting.
SLM Thresholds	
Max SLM	Enter a value that is greater than the value specified in the *Default SLM* field. If the ASA (average speed of answer) for this queue exceeds the value specified here, this queue will be excluded from the routing decision. If the ASA for every queue in the current group exceeds its specified Max SLM, queues in the next group will be considered in the routing decision.
Aba Call Threshold (Abandoned Call Threshold)	Specify the number of calls that must be routed to this queue during the *Compute Interval* before the *Abandoned %* will be considered in the routing decision.
Aba % (Abandoned %)	Enter a value from 1 to 100. After the *Abandoned Call Threshold* has been reached, calls will be routed to this queue only if the percentage of abandoned calls for the queue is less than the value specified here.
Transient Parameters	
Accuracy Threshold	If this is a proxy queue, enter a value from 1 to 100. If this is a standard CJP queue, the value is automatically set to 0 and cannot be changed. Accuracy is the percentage of ping events between the CJP system and the third-party ACD (represented by the proxy queue) that were successful in a specified time interval. The accuracy for a CJP queue is always 100%.
Default SLM	Enter a value that is less than the value specified in the *Max SLM* field; 0 is a valid value for this field. The SLM value specified here will be used to determine call routing for this queue when no vendor, real-time, or historical data is available. This setting applies only to proxy queues and is not relevant for CJP queues.

Setting	Description
Default Capacity	Specify the default number of active agents handling calls for this queue. This value will be used by the routing engine in the case where the proxy queue's actual capacity is not being provided through a data feed.

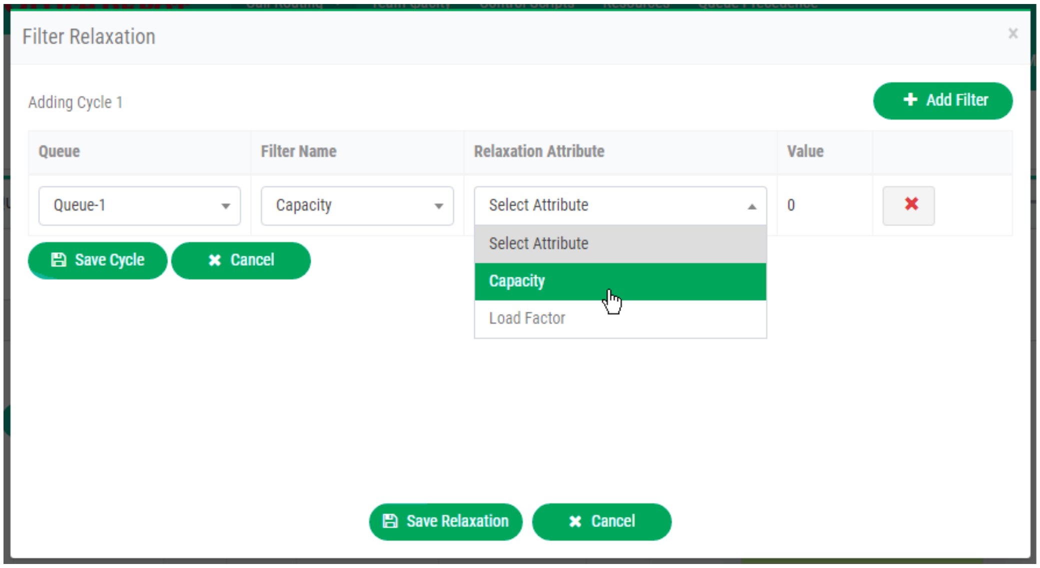
4. Optionally specify relaxation settings as follows:

   a. Click the **Filter Relaxation** button on the upper right side of the Queue Escalation tab.

   b. In the dialog box that opens, click **Add**.



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



Filter	Relaxation Attribute	Value
Abandons	Abandon %	Enter a number specifying how much to increase the *Abandoned %* value specified for the queue. Each relaxation cycle will increase the percentage as a cumulative. For example, if the original value is 10% and the relaxation value for the first cycle is 10, then the new value will be 20% in the first relaxation cycle. If the relaxation value for the second cycle is set to 10, the new value will be 30% in the second relaxation cycle.
	Call Threshold	Enter a number specifying how much to increase the number of calls specified for the queue in the *Abandoned Call Threshold* setting during the *Compute Interval* period before the abandons filter is applied. You can easily stop the system from applying the abandons filter on a queue by increasing this relaxation value to a high number.
Areacode-Blocking	Remove Blocking	Enter one of the following values: • **0** means do not remove area code blocking. • **1** means remove area code blocking for the queue.

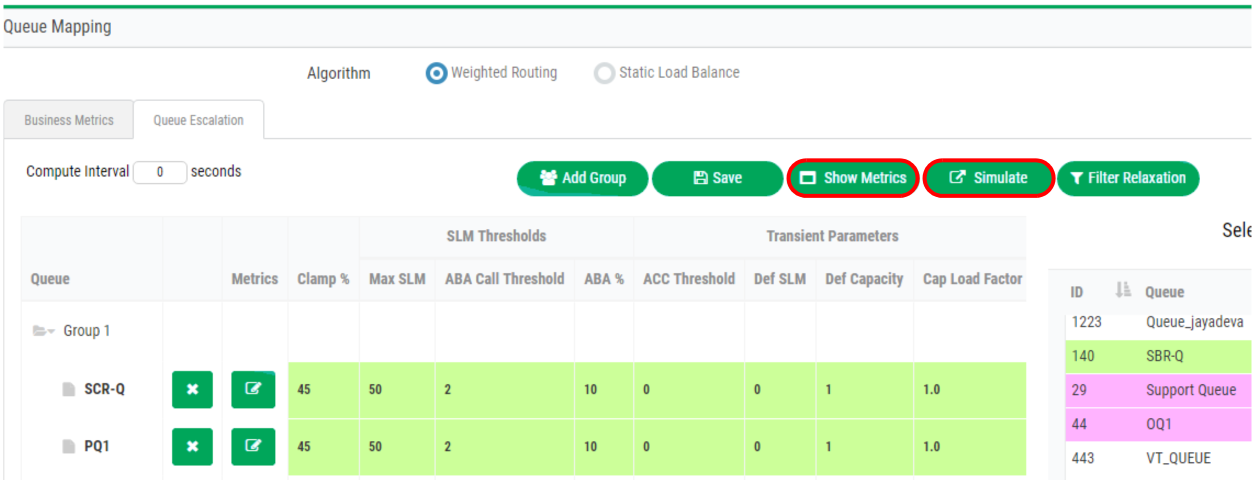
Filter	Relaxation Attribute	Value
Clamp Reached	Clamp %	Enter a number specifying how much to increase the *Percentage Clamp* value specified for the queue. Each relaxation cycle will increase the percentage as a cumulative. For example, if the original value is 10% and the relaxation for the first cycle is set to 10, then the new value will be 20% in the first relaxation cycle. If the relaxation for the second cycle is set to 10, the new value will be 30% in the second relaxation cycle.
Metric Exceeded	Metric Increment	Enter a number specifying how much to increase the *Max SLM* value specified for the queue. Each relaxation cycle will increase the percentage as a cumulative. For example, if the original value is 70000 milliseconds and the relaxation value specified for the first cycle is 10000 milliseconds, then the new value will be 80000 milliseconds in the first relaxation cycle. If the relaxation value specified for the second cycle is set to 10000, the new value will be 90000 milliseconds in the second relaxation cycle.
Capacity	Capacity	Enter a number specifying how much to increase the *capacity* for the queue. This value overrides system computed capacity. For example, if the default capacity is 25, and the relaxation value specified for the first cycle is 5, then the capacity will be increased to 30 in the first relaxation cycle.
	Load Factor	Enter a value specifying how much to increase the queue's *Max Capacity Load Factor*. For example, if the current load factor is 1.5 and you specify .5, then the load factor will be increased to 2. Thus, if the current capacity of the queue is 14, the number of active calls that can be sent to the queue will be increased to 28 (14 multiplied by 2).

5. Repeat step 4 for each additional relaxation cycle you want to add, and when you are finished adding cycles, click **Save Relaxation** on the lower right side of the dialog box.

6. When you are finished adding groups and queues and specifying settings and relaxation cycles, click the **Save** button to the right of the **Add Group** button to save your settings. Then click **Save** on the lower-left side of the page to save the routing strategy.

Using the Show Metrics and Simulate Buttons

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



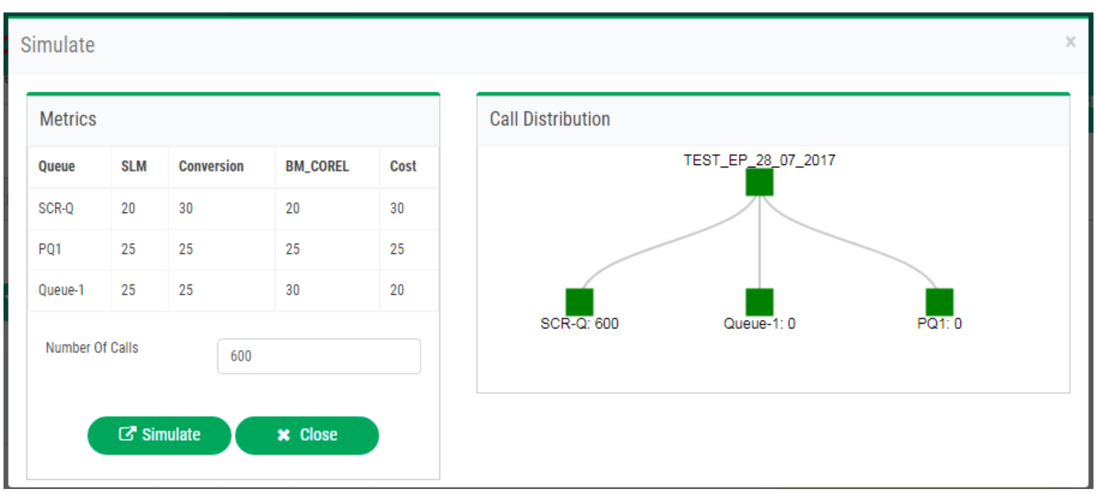
To open a dialog box that displays the weights currently assigned to each queue in the routing strategy:

➤ Click the **Show Metrics** button.

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

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

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



Modifying a Routing Strategy

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

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

To modify a routing strategy:

1. Open the **Routing Strategy** module.
2. If you are modifying a non-global routing strategy:

   a. On the Call Routing Strategy page, select an entry point or queue from the **Select Entry Point/Queue** drop-down list.

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

   b. Do one of the following:

      - From the list view, click the ••• button to the left of the strategy you want to modify and select **Edit**.
      - From the calendar view, click the link to the strategy you want to modify.
3. If you are modifying a global routing strategy:

   a. Click the **Call Routing** button on the menu bar, select **Global Routing Strategies**, and on the Global Routing Strategy page, select the **Entry Point** or **Queue** button on the upper-left side page.

   b. If you are modifying a strategy for cross-ACD entry points or for proxy queues, set the **CJP ACD** field to **False**.

   c. Click the ••• button to the left of a the strategy you want to modify and select **Edit**.
4. Make your changes. For information about each setting, see the setting descriptions table beginning on page 156.

5. If you are modifying the current strategy and want the changes to apply to calls currently in queue, select the **Apply changes to current calls in queue** check box on the lower right side of the page. If this check box is not selected, the changes will apply only to new calls.

6. Click **Save** to save your changes.

Deleting and Restoring Routing Strategies

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

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

Topics covered in this section:

- Deleting a Non-Global Routing Strategy
- Deleting a Global Routing Strategy
- Restoring or Permanently Deleting a Non-Global Routing Strategy
- Restoring or Permanently Deleting a Global Routing Strategy

Deleting a Non-Global Routing Strategy

To delete a non-global routing strategy:

1. Open the Routing Strategy module and on the Call Routing Strategy page, click the **List View** button.

2. Select an entry point or queue from the **Select Entry Point/Queue** drop-down list.

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

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

   The strategy is moved to the Deleted Routing Strategies page where it can be restored or permanently deleted (see “Restoring or Permanently Deleting a Non-Global Routing Strategy” on page 188).

Deleting a Global Routing Strategy

To delete a global routing strategy:

1. Open the Routing Strategy module, click the **Call Routing** button on the menu bar, and select **Global Routing Strategies**.
2. On the Global Routing Strategy page, select the **Entry Point** or **Queue** button on the upper-left side page.
3. If you are deleting a strategy for cross-ACD entry points or for proxy queues, set the **CJP ACD** field to **False**.
4. Click the ••• button to the left of the strategy you want to delete and select **Delete**. In the confirmation dialog box that opens, click **OK**.

   The strategy is moved to the Deleted Global Routing Strategies page where it can be restored or permanently deleted (see “Restoring or Permanently Deleting a Global Routing Strategy” on page 189).

Restoring or Permanently Deleting a Non-Global Routing Strategy

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

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

   The deleted routing strategies for the entry point or queue you selected are displayed.
3. Click the ••• button to the left of the strategy you want to either restore or permanently delete and do one of the following:
   - To permanently delete the strategy, click **Delete**. Then, in the confirmation dialog box, click **OK**.

     - OR -
   - To restore the strategy, click **Restore**.

     The Restore Routing Strategy page appears, displaying the settings for the routing strategy.
4. If you are restoring a strategy, modify the settings if you want to, and then click **Restore**.

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

Restoring or Permanently Deleting a Global Routing Strategy

To restore or permanently delete a global routing strategy:

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

     - OR -
   - To restore the strategy, click **Restore**.

     The Restore Global Routing Strategy page appears, displaying the settings for the routing strategy.
6. If you are restoring a strategy, modify the settings if you want to, and then click **Restore**.

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

Scheduling Team Capacity

A team's capacity setting represents the number of simultaneous calls the team can handle. Each capacity-based team is provisioned with a static capacity value of up to 10,000 (see "Teams" beginning on page 73).

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

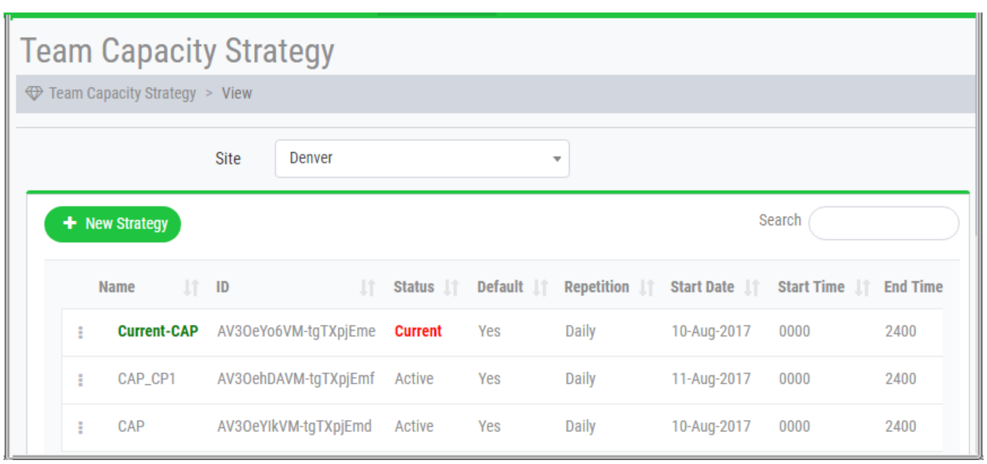
Because teams can service multiple queues, team capacity is independent of the call routing strategies that you create for queues.

Topics covered in this section:

Viewing Scheduled Team Capacity Strategies

To view existing team capacity strategies:

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



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

Column	Description
Name	The name assigned to the strategy when it was created.
ID	The identification number of the strategy. This number is automatically assigned by the system.
Status	Indicates the status of the strategy. • **Current** means that this is a snapshot of the current team capacity strategy for the selected site. You cannot copy the current team capacity strategy, but you can modify any setting that does not affect execution time or date. You can delete the current team capacity strategy, but do not delete it before creating a different strategy for the same time interval. Your changes will not affect the recurring scheduled version of the strategy. • **Active** means the strategy will become effective at the specified start time on the specified start date. • **Not Active** means the strategy will not become effective regardless of the specified start time and date. This status lets you save a strategy for future use or as a draft to continue working on later.
Default	Indicates whether the strategy is the default. A strategy that is *not* flagged as default overrides a default strategy and is used as an exception to the default schedule.
Repetition	Specifies whether the strategy is scheduled to be repeated daily or only on specific days of the week.
Start Date	The date the strategy is scheduled to start.
Start Time	The time the strategy is scheduled to start (in 24-hour format) for any given day in the specified date range.
End Time	The time the strategy is scheduled to end (in 24-hour format) for any given day in the specified date range.
End Date	The date the strategy is scheduled to end.

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

Creating or Modifying a Scheduled Team Capacity Strategy

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

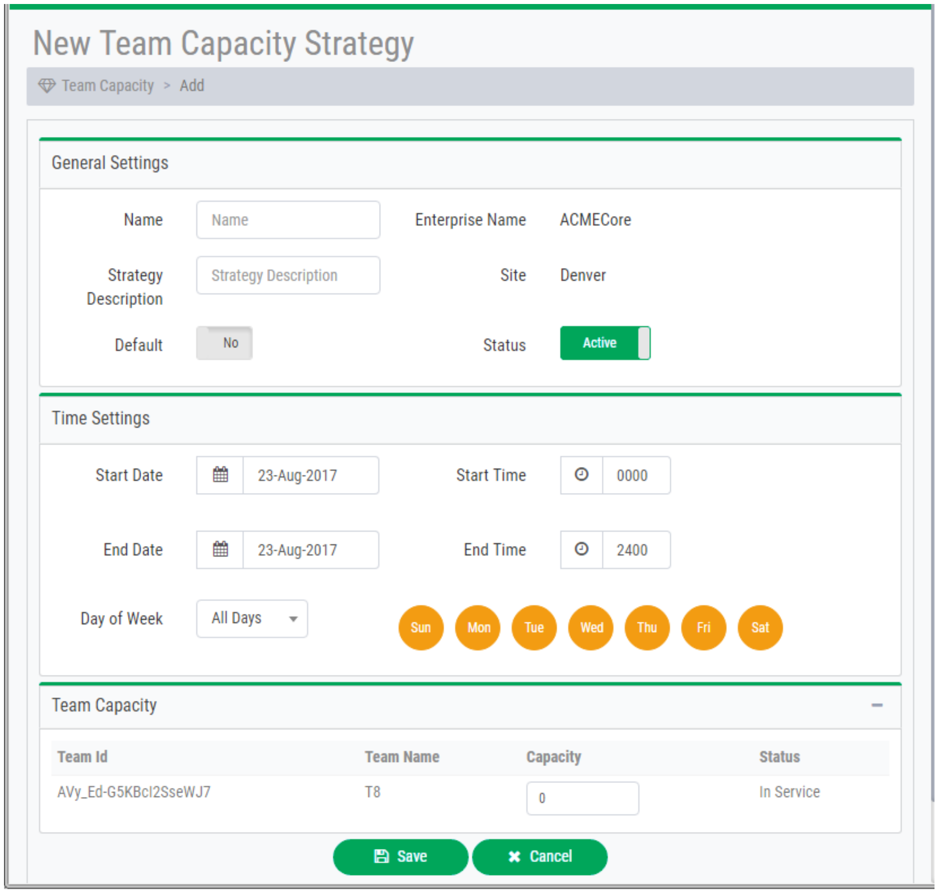
- Although you cannot copy the current team capacity strategy, you can modify any of its settings except those that affect execution time or date. These changes have no effect on the recurring scheduled version of the strategy.
- When you modify the currently running strategy, your changes take effect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

To create or modify a team capacity strategy:

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

   The team capacity strategies for the site you selected are displayed.
3. Do one of the following:
   - Click the **New Strategy** button.

     - OR -
   - Click the ▪▪▪ button to the left of the listed strategy you want to modify or copy and select **Edit** or **Copy**
4. On the page that appears, specify the appropriate settings as described in the following table.



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

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

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

Deleting a Scheduled Team Capacity Strategy

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

To delete a team capacity strategy:

1. Open the **Routing Strategy** module and click the **Team Capacity** button on the menu bar.

2. If the strategies for the site you want to view are not currently displayed, make a selection from the **Site** drop-down list.

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

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

Specifying Queue Precedence

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

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

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

To set up a team routing scenario:

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

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

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

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

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

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

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

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

Audio on Hold

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

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

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

Creating Audio-on-Hold Files

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

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

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

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

wav: u-Law, mono 8.000 kHz.

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

Implementing Audio on Hold

To implement audio on hold:

1. Upload audio files as described in “Uploading a Resource File” on page 141.
2. Create a routing strategy that uses the audio file (see “Creating a Routing Strategy” on page 154).
3. Make a test call to ensure that the appropriate audio file is played when your call is queued.

5 Real-Time Reports

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

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

Topics covered in this chapter:

See also:

- "Provisioned Items Reports" on page 111.
- "CJP Report Parameters" beginning on page 415.

Real-Time Reports Overview

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

Report Formats

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

- **Snapshot reports** display current contact center activity. The data is refreshed every 10 seconds. For details, see "Call Snapshot Report Parameters" on page 201 and "Data Available in Agent Snapshot Reports" on page 222.
- **Interval reports** display cumulative and derived values. The data is displayed in half-hour segments since midnight; the data for the current 30-minute time interval is displayed in five-minute segments. For details, see "Call Interval Report Parameters" on page 203 and "Displaying a Real-Time Agent Interval Report" on page 239.

Canned Reports and Tickers

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

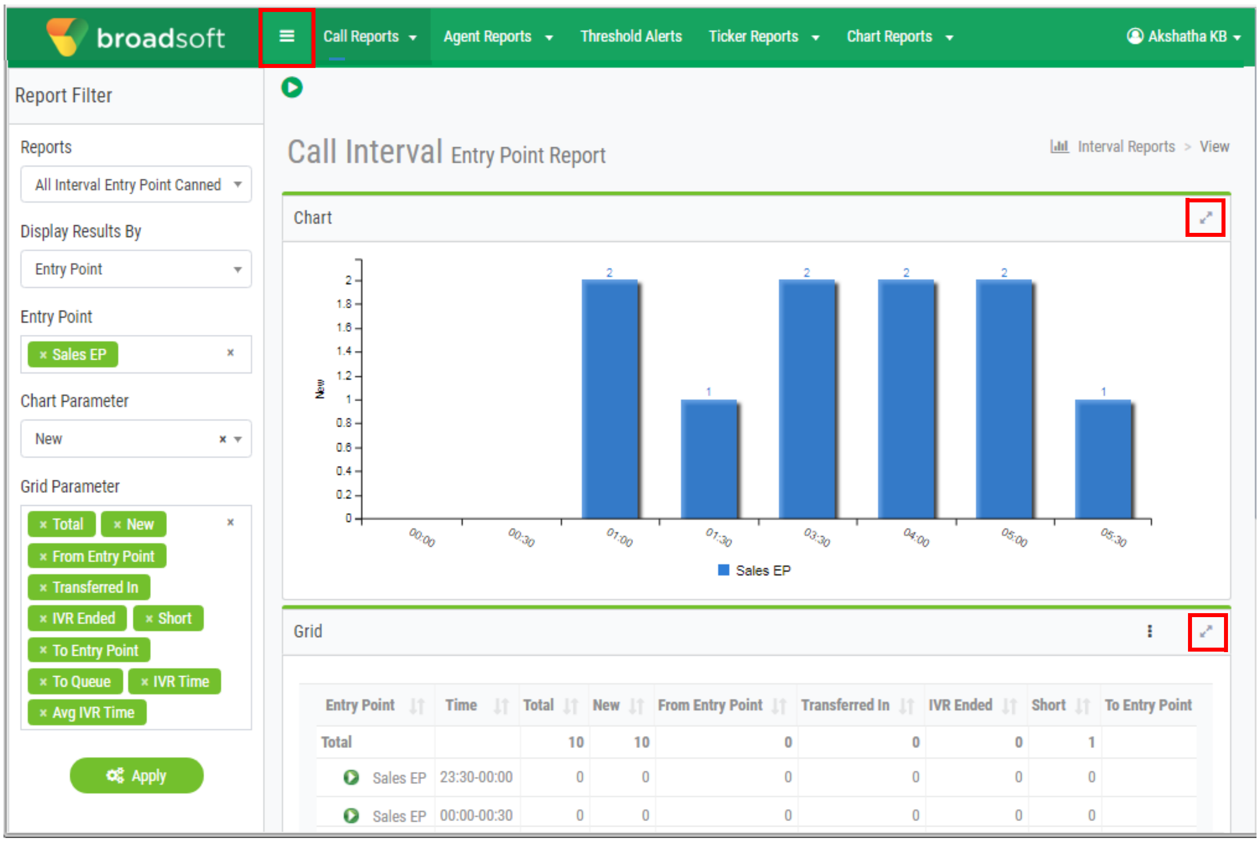
A few things to note about canned reports and tickers:

- You cannot edit or delete canned reports or tickers; you can only copy them.
- Although a canned report acts as a default report when you open the module, note that the value in the Default column for the canned report is *No*. This is done so that you can assign the default value to a report of your choosing.
- To override the default canned report or ticker, create a new report or ticker, select **Set As Default**, and then log out and log in again to see the change.

Showing and Hiding Report Panels

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

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



Sorting, Reordering, and Navigating Report Grids

Topics covered in this section:

- Sorting the Data in a Grid
- Reordering Columns in a Grid
- Using the Controls at the Bottom of a Grid

Sorting the Data in a Grid

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

To sort by a single column:

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

To sort by multiple columns:

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

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

Reordering Columns in a Grid

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

Using the Controls at the Bottom of a Grid

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

Viewing Real-Time Call Activity

Topics covered in this section:

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

See also Sorting, Reordering, and Navigating Report Grids.

Call Snapshot Report Parameters

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

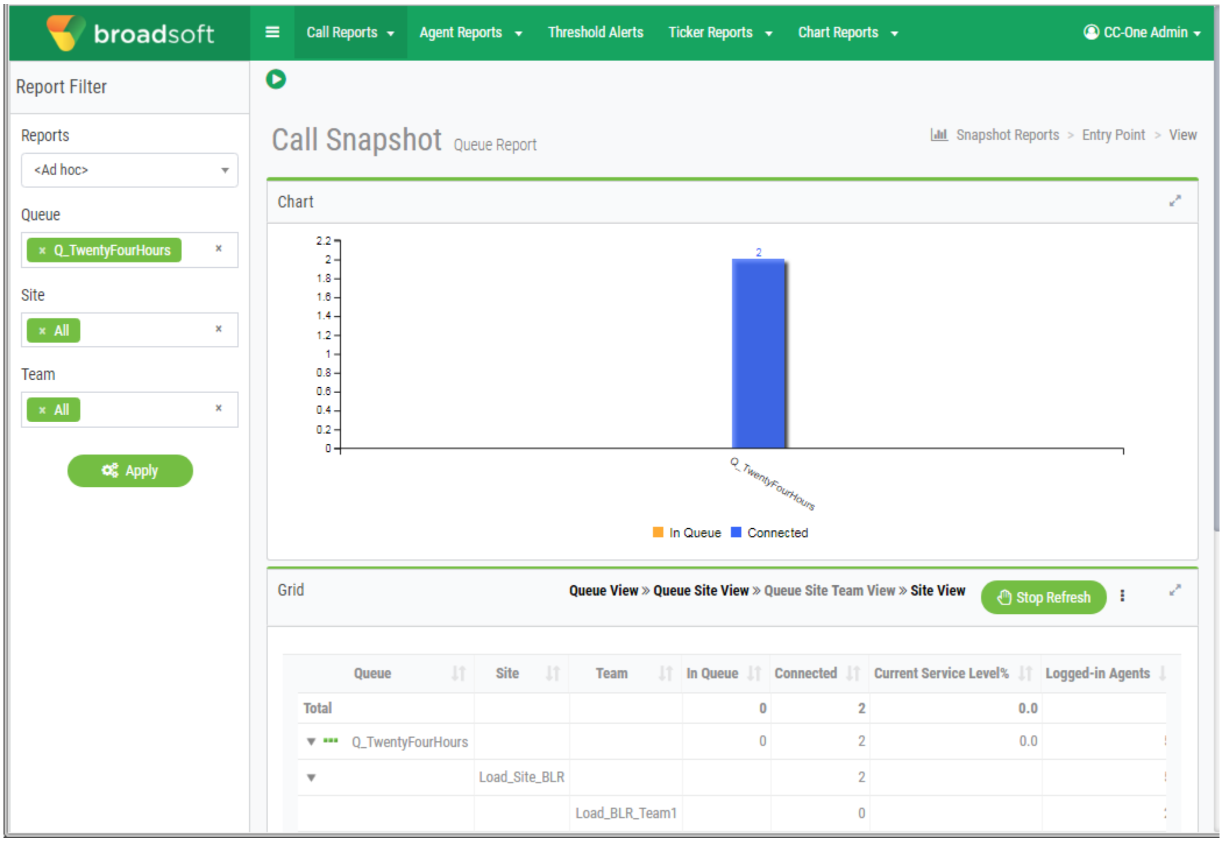
The data is refreshed every 10 seconds, but you can use the **Stop Refresh** button to prevent the data from being refreshed during the current session.

The following parameters are displayed in call snapshot reports:

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

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

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



Call Interval Report Parameters

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

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

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

Topics covered in this section:

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

Real-Time and Historical Parameters for Entry Points

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

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

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

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

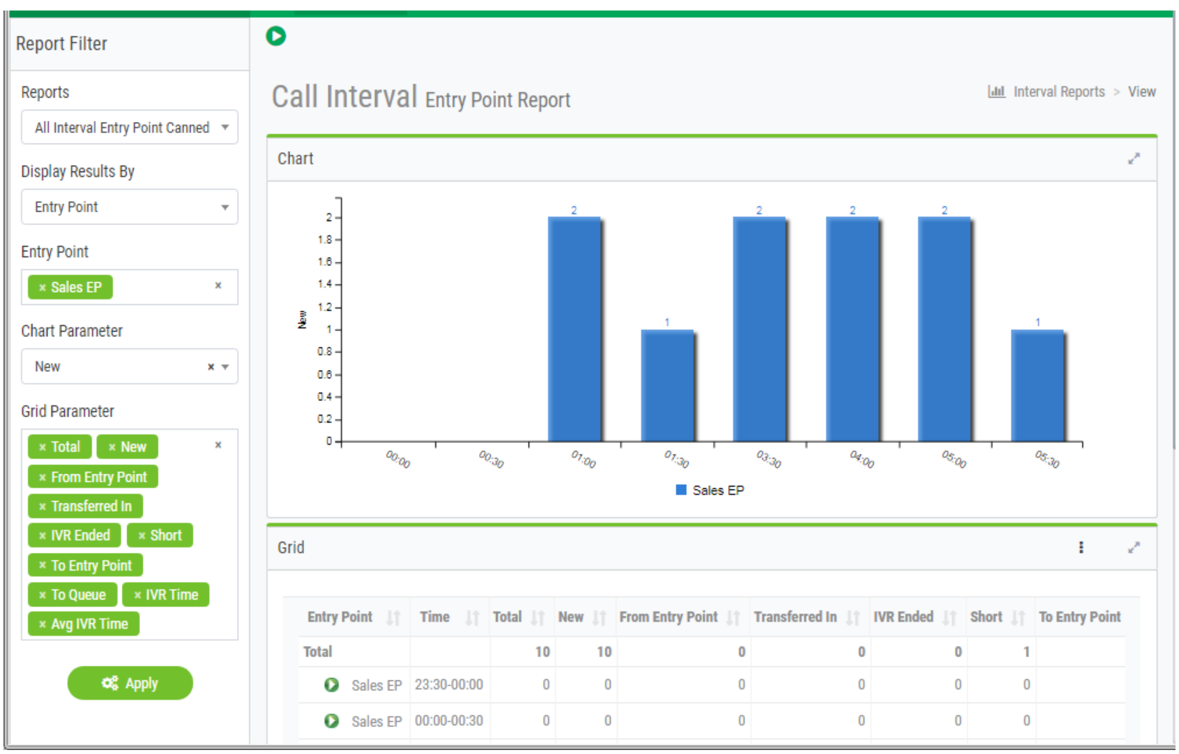
Category	Parameter	Description
Summary	Queue*	The name of a queue.
	Site*	The name of a site (appears only in site-level and team-level reports).
	Team*	The name of a team (appears only in team-level reports).
	Skill	The name of a skill (appears only in skills by queue reports).
	Time*	The time interval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

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

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

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

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



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

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

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

Displaying a Call Snapshot Report

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

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

To display a call snapshot report:

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

   The default call snapshot report is displayed. For a description of each parameter, see "Call Snapshot Report Parameters" on page 201.

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

3. To display an ad hoc report, select report parameters from the Report Filter panel on the left, and then click **Apply**.

   - For an entry point report, make sure an entry point report is already displayed, and then select one or more entry points from the Report Filter panel.
   - For a queue report, make sure a queue report is already displayed, and then select one or more queues, sites, and teams from the Report Filter panel.
   - For a skills report, make sure a skills by queue report is already displayed, and then select one or more queues and skills from the Report Filter panel.

   Note: If the Report Filter panel is not already displayed, click the ☰ button on the left side of the menu bar. See "Showing and Hiding Report Panels" on page 199 for more information.

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

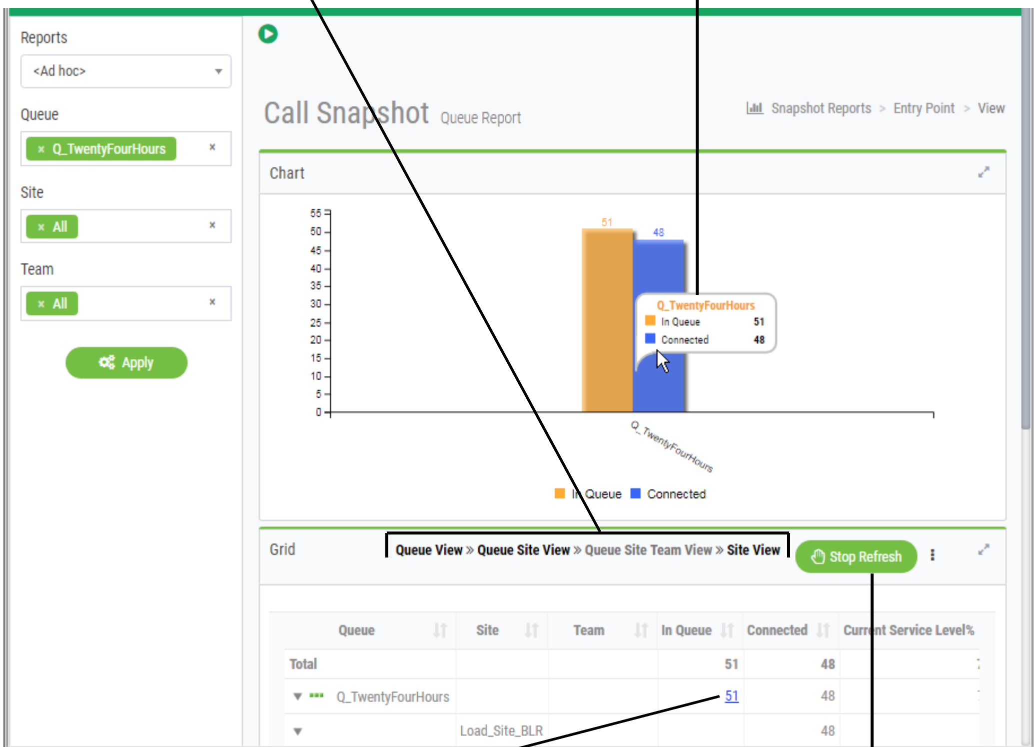
5. To change the sort order in the grid, click a column header to sort the data by that column, and click it a second time to reverse the sort order. To sort by additional columns, hold down the Ctrl key while you click a second and subsequent headings.

6. In a snapshot report for queues, click one of the following links on the Grid panel header to reduce or increase the level of data in the report.

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

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

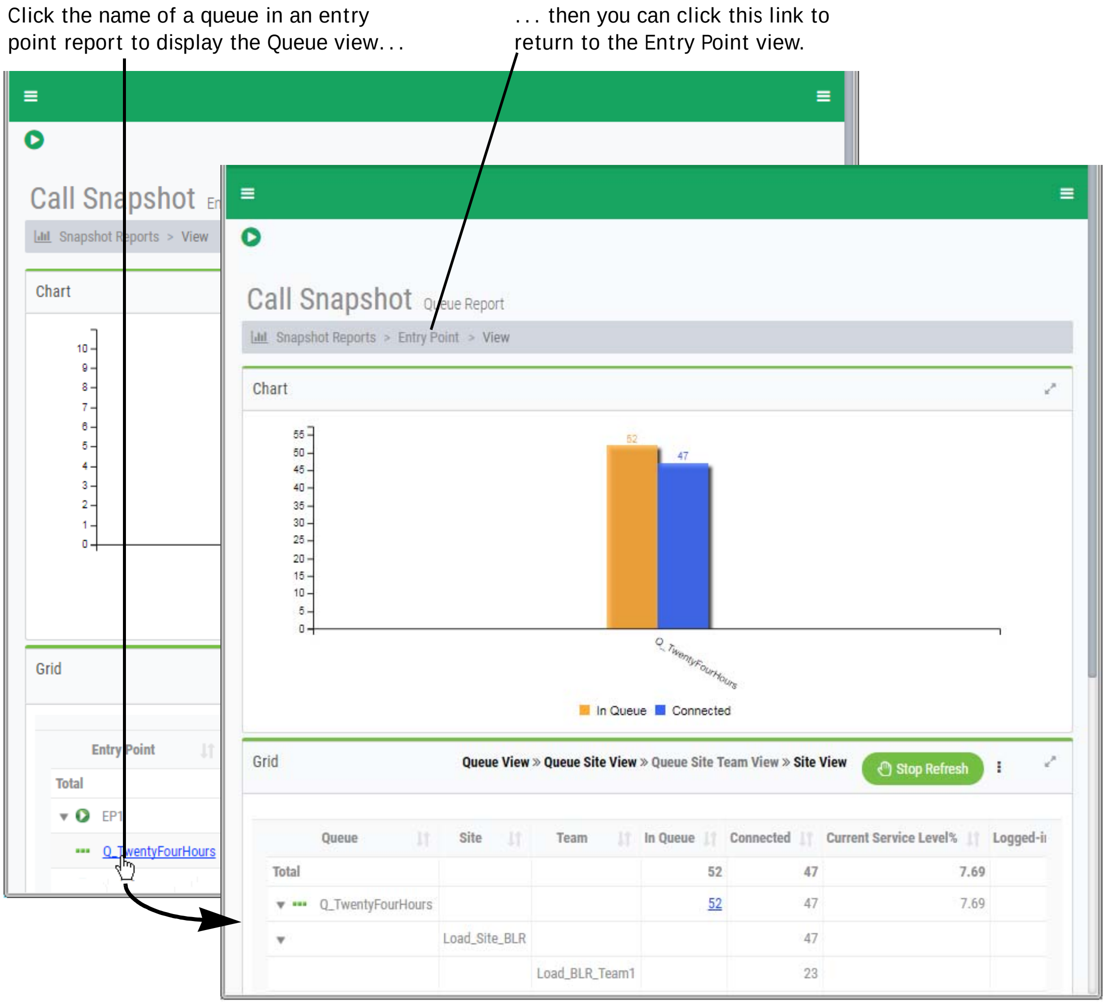
Rest the cursor over a bar to display a description of the data represented by the bar.



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

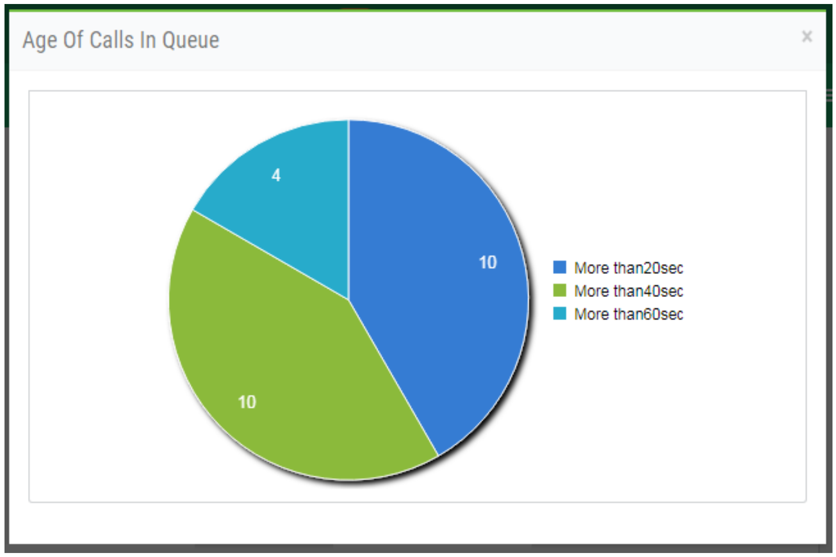
Click **Stop Refresh** to prevent data in the table from being updated every 10 seconds.

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



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

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



Displaying a Call Interval Report

To display a call interval report:

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

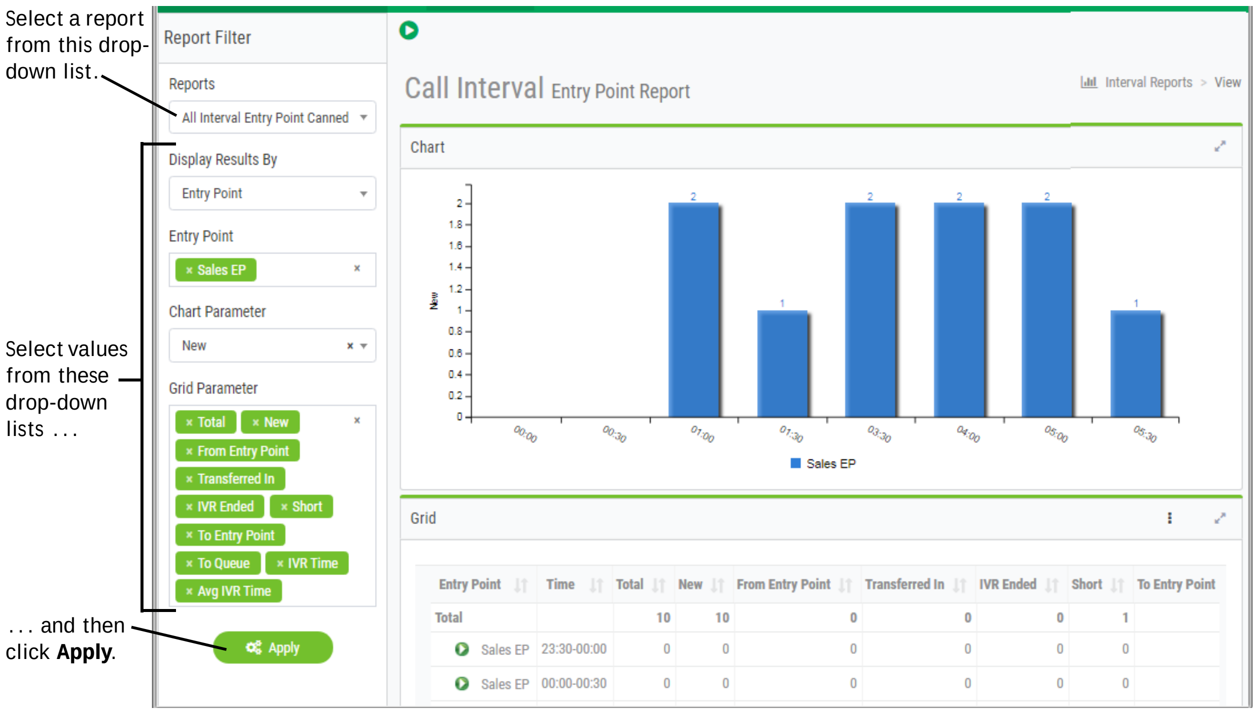
   The default call snapshot report is displayed.

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

   A default interval report is displayed.

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

4. To display a different report, make a selection from the **Reports** drop-down list.



5. To display different statistics, select the settings you want from the lists in the Report Filter panel on the left side of the page:

   a. Select a value from the **Display Results By** list to specify whether you want to display results by entry point, queue, site, or team. (This setting is not available for a skills by queue reports.)

   b. Select the entry points, queues, sites, teams, or skills you want included in the report.

   c. Select the parameter from the **Chart Parameter** list that you want to be displayed in the chart, and select the parameters from the **Grid Parameter** list that you want to be displayed as columns in the grid.

      For an explanation of the available parameters, see "Call Interval Report Parameters" on page 203.

   d. Click **Apply**.

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

Note: If the Report Filter panel is not already displayed, click the ☰ button on the left side of the menu bar. See "Showing and Hiding Report Panels" on page 199 for more information.

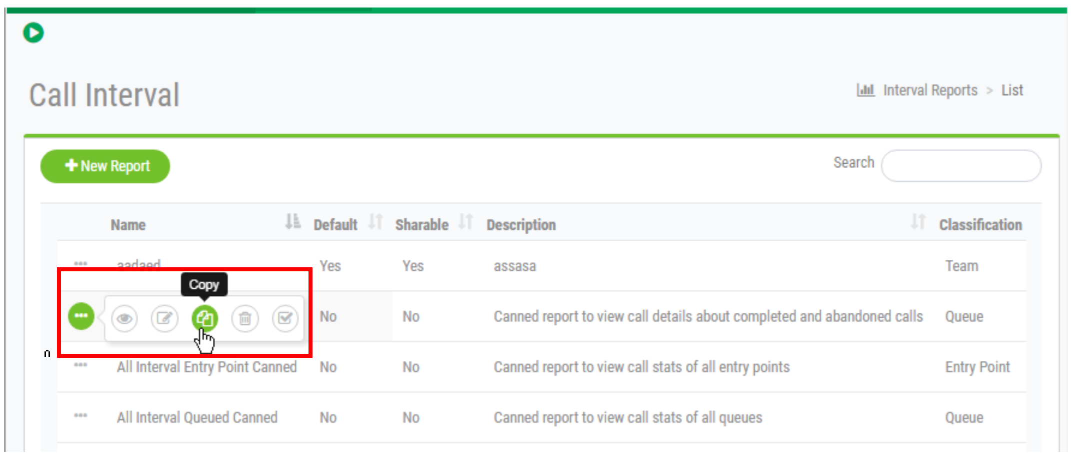
Creating a Custom Call Interval Report

To create a custom call interval report:

1. Open the **Real-Time Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Interval Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
   - Click the **New Report** button on the upper-left side of the page.

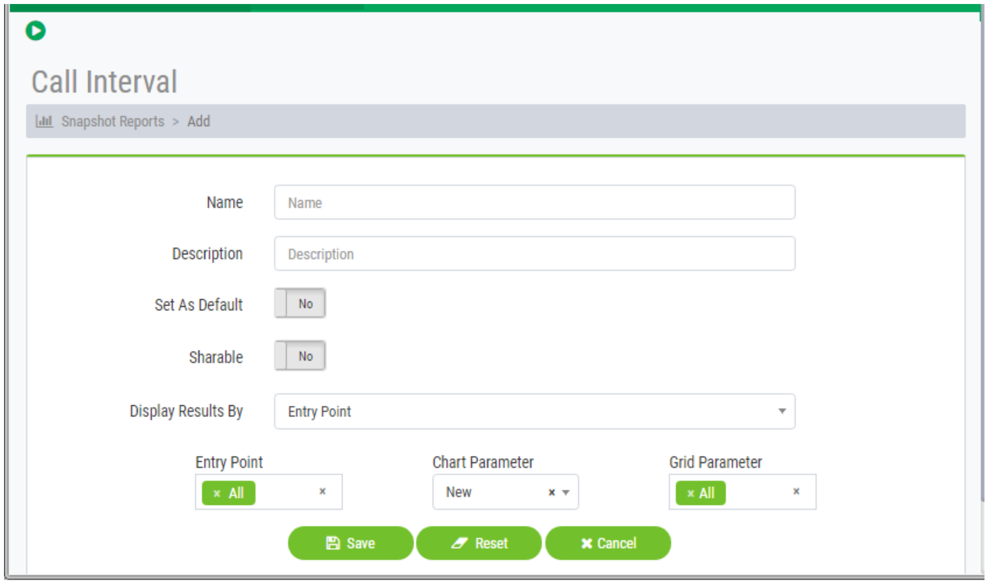
   -OR-

   - To copy an existing report, click the ▪▪▪ button to the left of a listed report and select **Copy**.



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

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



Setting	Description
Name	Enter a name for the report.
Description	Optionally, enter a short description of the report.
Set As Default	Select **Yes** if you want this report to be displayed the next time you click the **View Interval Reports** link. For CJP Management Portal users, the default report is also displayed on the Portal home page. **Note:** You must log out and log in again for the new default to take effect.
Sharable	Select **Yes** if you want everyone who has access to the CJP Real-Time Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by entry point, queue, site, team, or skill queue.
Chart Parameter	Select the single parameter that you want displayed in the report chart.
Grid Parameter	Select the parameters that you want displayed as columns in the report grid. For an explanation of the available parameters, see “Call Interval Report Parameters” on page 203.

Creating a Custom Call Snapshot Report

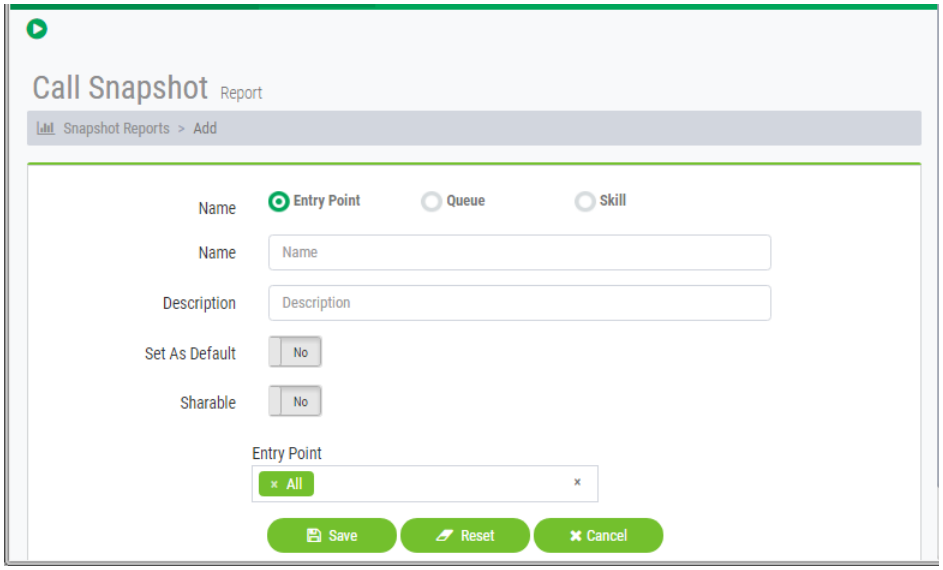
To create a custom call snapshot report:

1. Open the **Real-Time Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Snapshot Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
   - Click the **New Report** button on the upper left side of the page.

   -OR-

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

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



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

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

Specifying a Different Default Real-Time Call Report

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

To specify a different default report:

1. Open the **Real-Time Reports** module.
2. Click the **Call Reports** button on the menu bar and select either **Customize Snapshot Reports** or **Customize Interval Reports** from the drop-down list.
3. On the page that appears, the ▪▪▪ button to the left of a listed report that is not canned and select **Set As Default**.

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

Viewing Real-Time Agent Activity

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

Topics covered in this section:

See also “Sorting, Reordering, and Navigating Report Grids” on page 200.

Displaying Agent Snapshot Reports

Agent snapshot reports provide detailed information about all agent activity at the site level. You can drill down through the information to view agent activity at the team and agent level. To view agent activity for multiple teams, create a custom multi-team report (see “Creating a Custom Agent Snapshot Report” on page 237).

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

To display an agent snapshot report:

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

   The default agent snapshot report is displayed.
3. To display a different report, select an entry from the **Reports** drop-down list.

4. To display an ad hoc report:

   a. Make sure the type of report you want to display is already displayed; then select parameters from the Report Filter panel. For example:

      - If the *AgentSite* report is displayed, select the sites you want the report to cover.
      - If the *All Agent Canned* report is displayed, select up to 100 agents you want the report to cover.
      - If *All Agents by Skills* report is displayed, select the skills you want the report to cover.
      - If the *All Skills by Teams* report is displayed, select the teams you want the report to cover.
      - If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.

   b. Click **Update Report**.

   Note: If the Report Filter panel is not already displayed, click the ☰ button on the left side of the menu bar. See "Showing and Hiding Report Panels" on page 199 for more information.

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

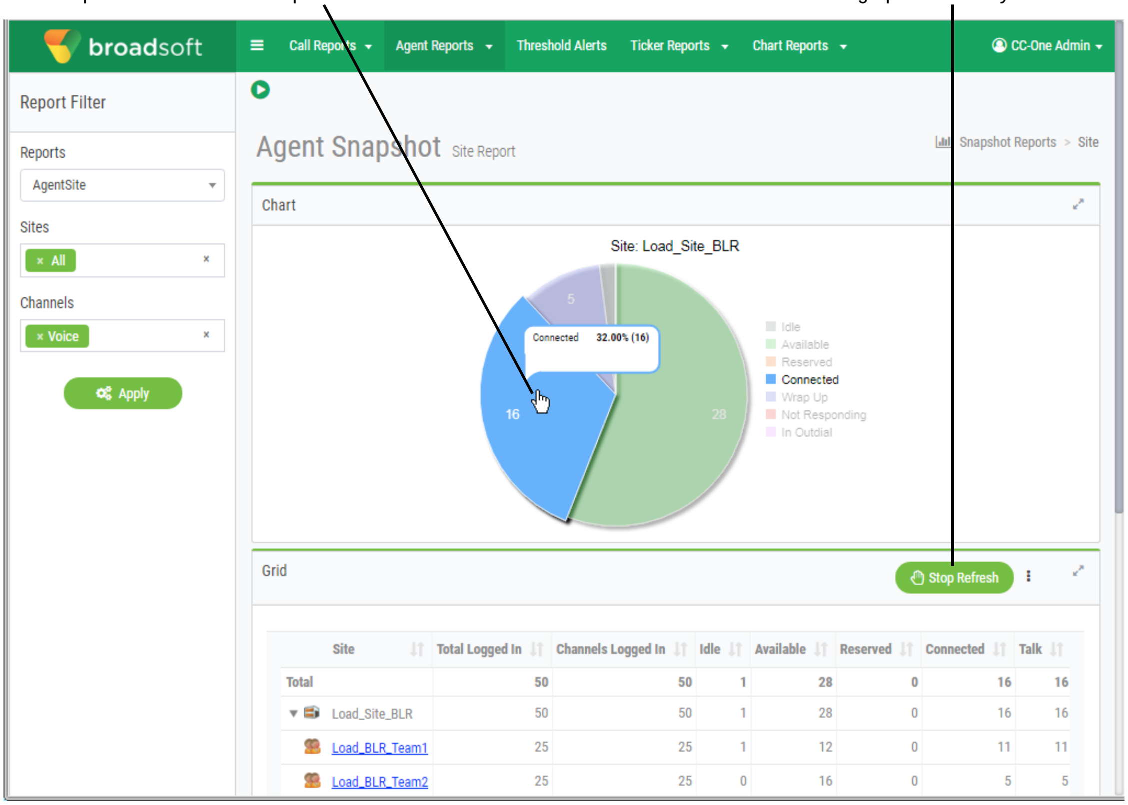
   Note: The refresh interval for a multi-team report is 90 seconds.

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

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

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

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



7. To drill down to the Team view, click the name of a team in the **Team** column.

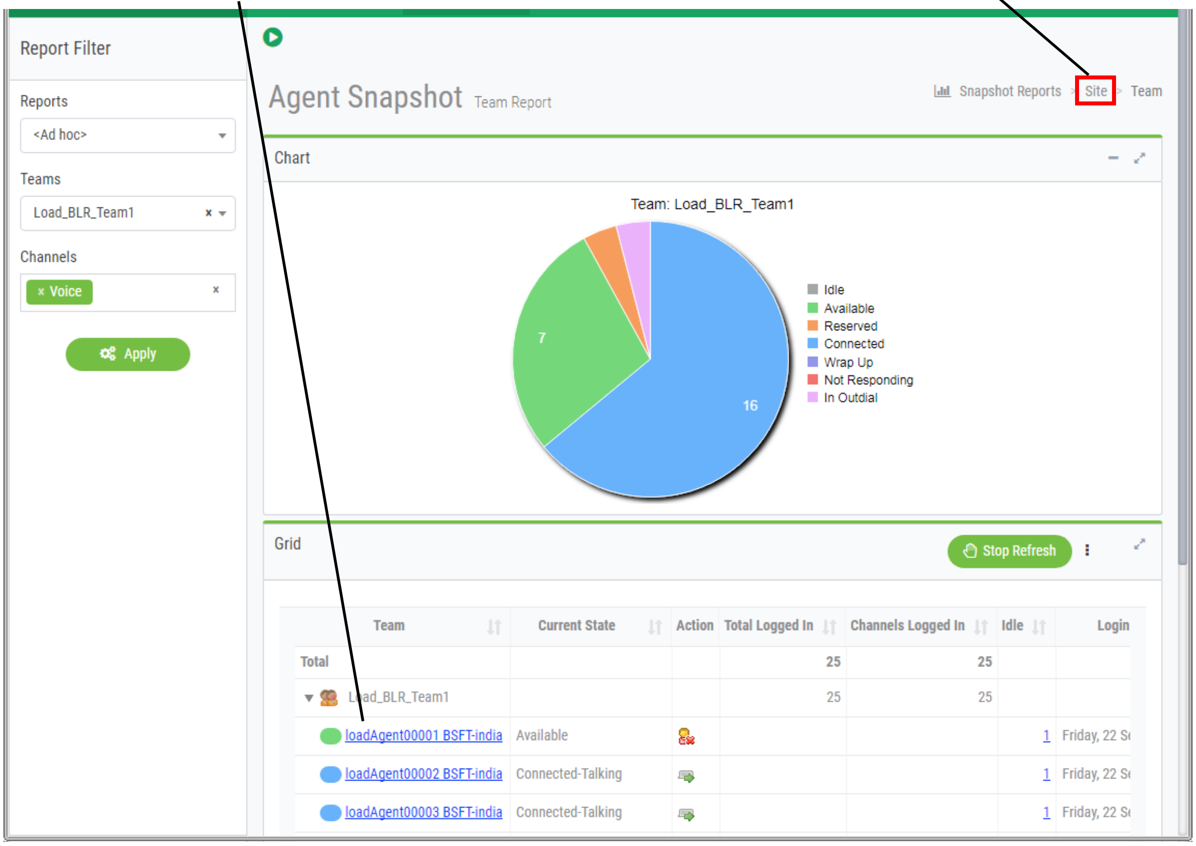
   For more information about the Team view, see “Team View” on page 225.

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

   The Agent view displays call data for that agent. For more information, see “Agent View” on page 228.

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

Click this link to return to the Site view.



Data Available in Agent Snapshot Reports

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

Agent State	**Description**
Available	The agent is available and waiting for calls.
Connected	The agent has picked up the phone and is connected with a caller. When the agent is in the Connected state, the agent's sub-state is also displayed—*Connected-on-hold* or *Connected-talking*.
Consulting	The agent is consulting with another agent.
Idle	The agent is logged in but not available for a specified reason (for example, lunch break, meeting).
Not Responding	The phone rang but was not answered within a specified period of time. The call is routed to another agent. An agent who is in this state must manually click the Available button to get out of this state.
Outdial Connected	The agent is connected to an outdial call. When the agent is in the Outdial Connected state, the agent's sub-state is also displayed—*Outdial-Connected-on-hold* or *Outdial-Connected-talking*.

Agent State	Description
Reserved	A call is coming in to the agent's station but the agent has not yet answered it.
Outdial Reserved	The agent has initiated a call, but the call is not connected yet.
Wrap Up	The call has ended but the agent is not ready for the next call.

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

- Site View
- Team View
- Agent View

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

- Skill View
- Skills by Team View

Site View

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

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

You can click the name of a team listed in the report grid to display the Team view for that team, as described in "Displaying Agent Snapshot Reports" beginning on page 219.

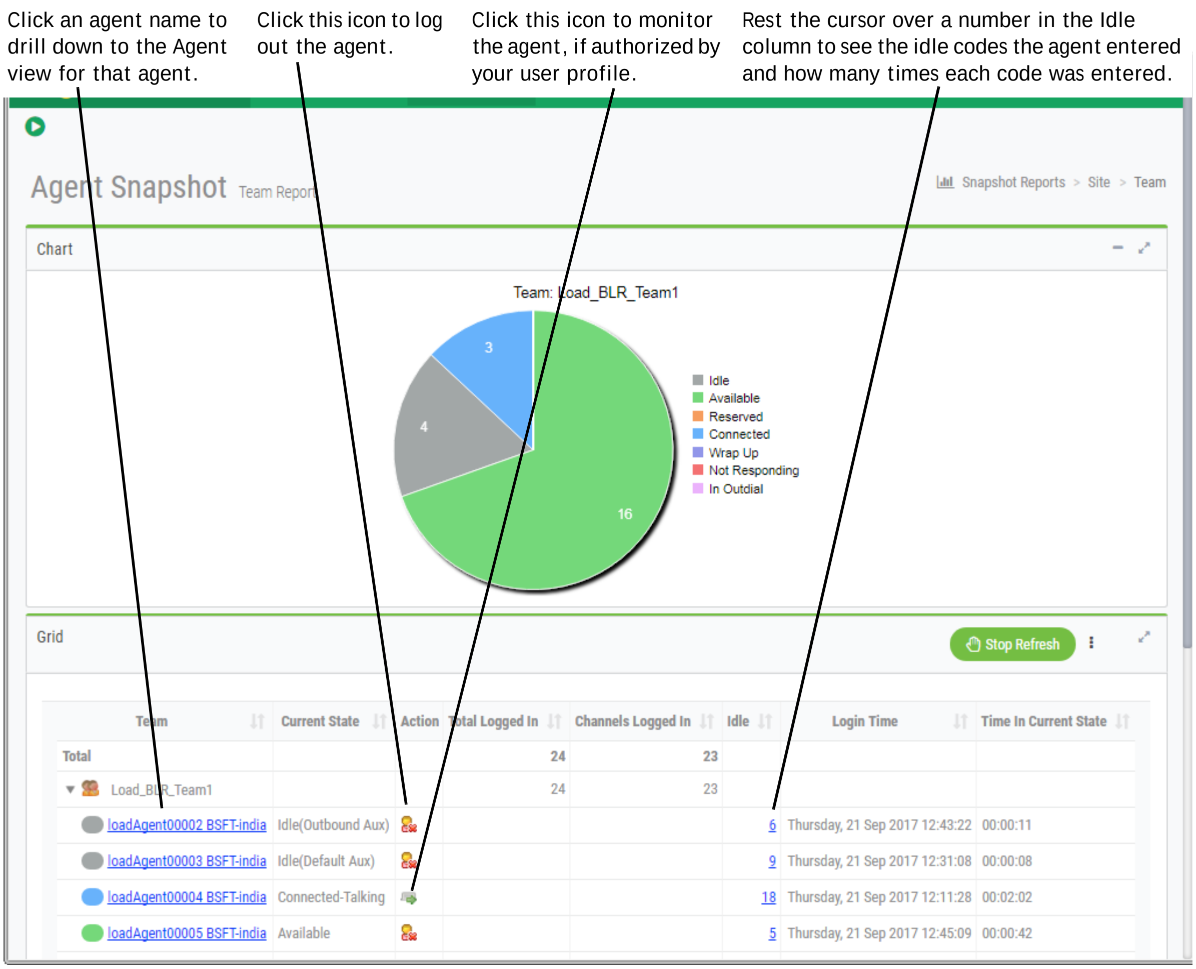
The report grid displays the following information for each site in the report.

Column	Description
Site	The name of the site. • Click a collapse arrow (▼) or expand arrow (▶) next to a site name to collapse or expand the list of logged-in teams at the site. • Click the name of a team to drill-down to the Team view for that team. • If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse or expand arrow to the left of a team name to collapse or expand the channel details.
Total Logged In	The number of agents currently logged in.
Channels Logged In	The number of media channels to which agents are currently logged in.
Idle	The number of agents currently in the Idle state.
Available	The number of agents currently in the Available state.
Reserved	The number of agents currently in the Reserved state, during which a call is coming in but has not yet been answered.
Connected	The number of agents currently connected to an inbound call.
Talk	The number of agents in the Connected state who are currently talking with a caller.
Hold	The number of agents in the Connected state who have placed the caller on hold.
Consulting	The number of agents currently consulting with another agent.
CTQ	The number of agents currently consulting with another agent after initiating or answering a consult-to-queue request.
Wrap Up	The number of agents currently in the Wrap-up state.
Not Responding	The number of agents currently in the Not Responding state.
In Outdial	The number of agents who are connected to or are wrapping up an outdial call.

Team View

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

To display information for multiple teams, create a custom multi-team report (see "Creating a Custom Agent Snapshot Report" on page 237).



Column	Description
Team	The name of the team. • Click a collapse arrow (▼) or expand arrow (▶) next to a team name to collapse or expand the list of logged-in agents on the team. • Click the name of an agent to drill-down to the Agent view for that agent. • If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse or expand arrow to the left of an agent name to collapse or expand the data grouped by channel type.

Column	Description
Current State	The agent's current state. See the table on page 222 for a description of each state that can appear in this column. If the current state is Idle, the idle code the agent selected is shown in parentheses (no code is shown if the agent has just logged in and has not selected an idle code).
Action	Icons you can click to perform an action: • Click the **Logout** ( ) icon to log out the agent. For more information, see "Logging Out an Agent" on page 236. • Click the **Monitor** ( ) icon to open the Call Monitoring module where you can monitor the agent's call by entering your callback number and clicking the **Midcall Monitor** button. This icon is displayed only if the agent is in the Connected state and your user profile authorizes midcall monitoring. For more information, see Chapter 7, "Call Monitoring," beginning on page 307.
Total Logged In	The total number of agents currently logged in.
Channels Logged In	The number of media channels to which agents are currently logged in. Appears only if your enterprise uses the Multimedia feature.
Idle	The number of times the agent went into the Idle state from a different state. Rest the cursor over a number in this column to display a pop-up showing the idle codes the agent entered and how many times each code was entered. **Note:** Because an agent can change the idle code while in the Idle state, the number of idle codes displayed in the pop-up can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email.
Login Time	The date and time the agent logged in.
Time in Current State	How long the agent has been in the current state.
Staff Hours	The amount of time the agent has been logged in.
DN	The dial number the agent used to log in to the Agent Desktop.
Queue	If the agent is currently handling a call, the name of the queue that the call came in on.
Calls Handled	The number of calls the agent handled since logging in. Rest the cursor over a number in this column to display a pop-up showing the wrap-up codes the agent entered and how many times each code was entered.
In Outdial	The number of times the agent was connected to or was wrapping up an outdial call.

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

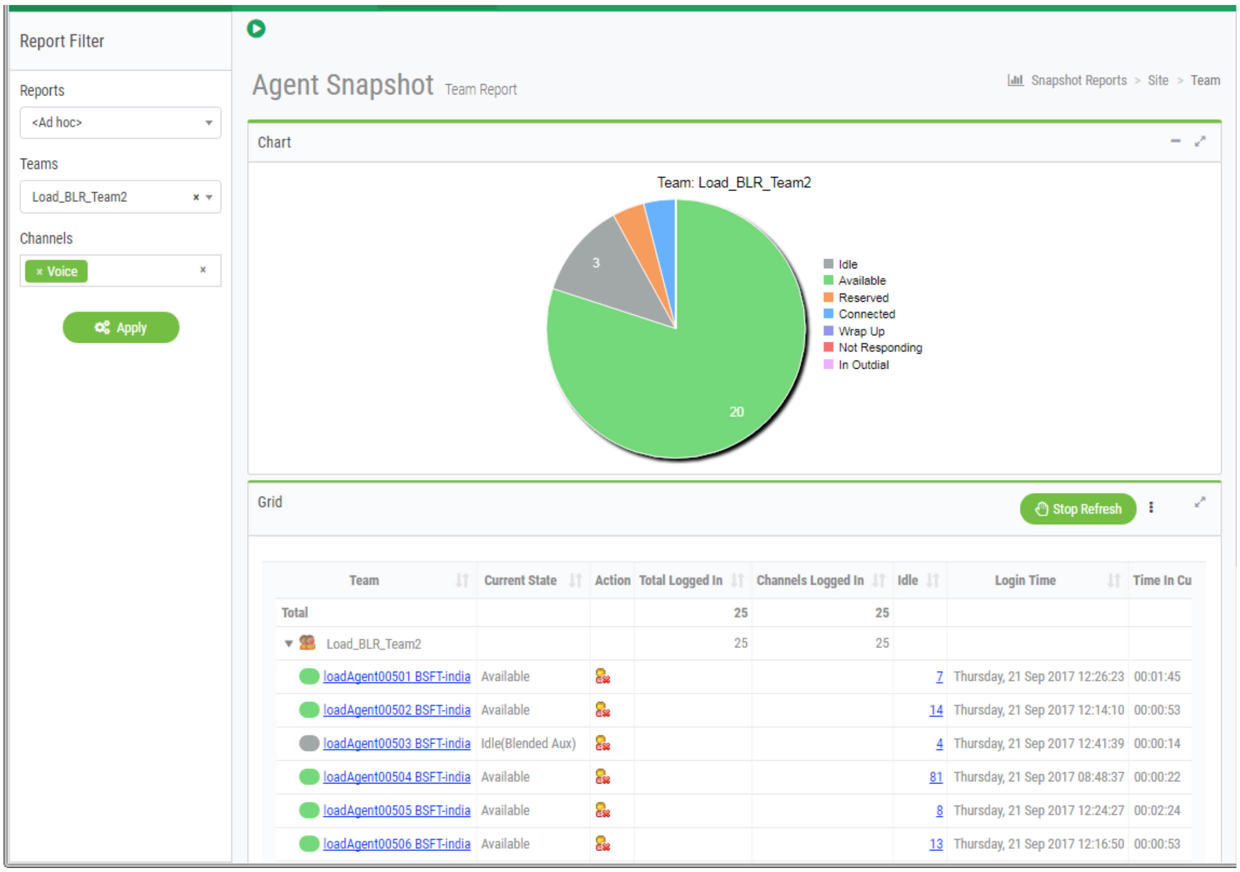
The Multi-Team view can display activity for up to 40 agents per page. Agents for a team may be split across pages.

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

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

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

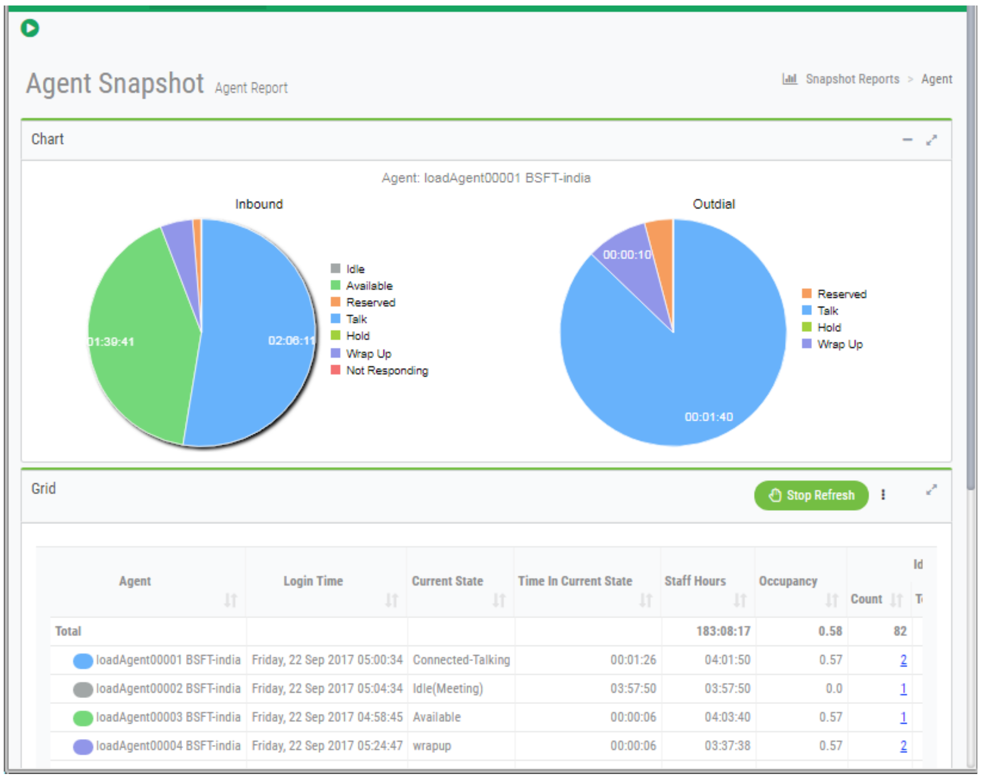
2. Click **Apply**.



Agent View

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

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



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

Column	Description
Agent	The name of an agent.
Login Time	The time the agent logged in.
Current State	The state the agent is currently in. See the table on page 222 for a description of each state that can appear in this column.
Time in Current State	The amount of time the agent has been in the current state.
Staff Hours	The amount of time the agent was logged in during this login session.
Occupancy	The measure of time the agent spent on calls compared to available and idle time (Total Talk Time + Total Hold Time + Total Wrap Up Time + Outdial Connected Time + Outdial Wrap Up Time divided by Staff Hours).

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

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

Column	Description
Inbound CTQ	**Count.** Inbound CTQ Answer Count plus Inbound CTQ Request Count.
	Total Time. Total Inbound CTQ Answer Time plus Total Inbound CTQ Request Time.
Outdial Consult Answer	**Count.** The number of times the agent answered a consult request from another agent who was on an outdial call.
	Total Time. The total amount of time the agent was consulted by another agent who was on an outdial call.
Outdial Consult Request	**Count.** The number of times the agent consulted another agent while on an outdial call.
	Total Time. The total amount of time the agent consulted another agent during an outdial call.
Outdial Consult	**Count.** Outdial Consult Answer Count plus Outdial Consult Request Count.
	Total Time. Outdial Consult Answer Total Time plus Outdial Consult Request Total Time.
Outdial CTQ Answer	**Count.** The number of times the agent answered a consult-to-queue request from an agent who was on an outdial call.
	Total Time. The total amount of time the agent spent answering consult-to-queue requests from agents handling outdial calls
Outdial CTQ Request	**Count.** The number of times the agent initiated a consult to queue while handling an outdial call.
	Total Time. The total amount of time between when the agent initiated consult-to-queue requests while handling outdial calls and when the consultations ended.
Outdial CTQ	**Count.** Outdial CTQ Answer Count plus Outdial CTQ Request Count.
	Total Time. Total Outdial CTQ Answer Time plus Total Outdial CTQ Request Time.
Outdial Conference	The number of outdial calls the agent conferenced with another party.
Inbound Transfers	The number of inbound calls the agent transferred to another agent or number.
Outdial Transfers	The number of outdial calls the agent transferred to another agent, queue, or number.
Agent Requeue	The number of inbound calls the agent requeued.
Queue	If the agent is currently handling a call, the queue the call came in on.
DN	The dial number the agent used to log in to the Agent Desktop.
Inbound Average Handle Time	The average length of time spent handling a call (total inbound talk time plus total inbound hold time and total inbound wrap-up time, divided by inbound connected count).

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

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

To change the report parameters:

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

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

2. Click **Apply**.

Skill View

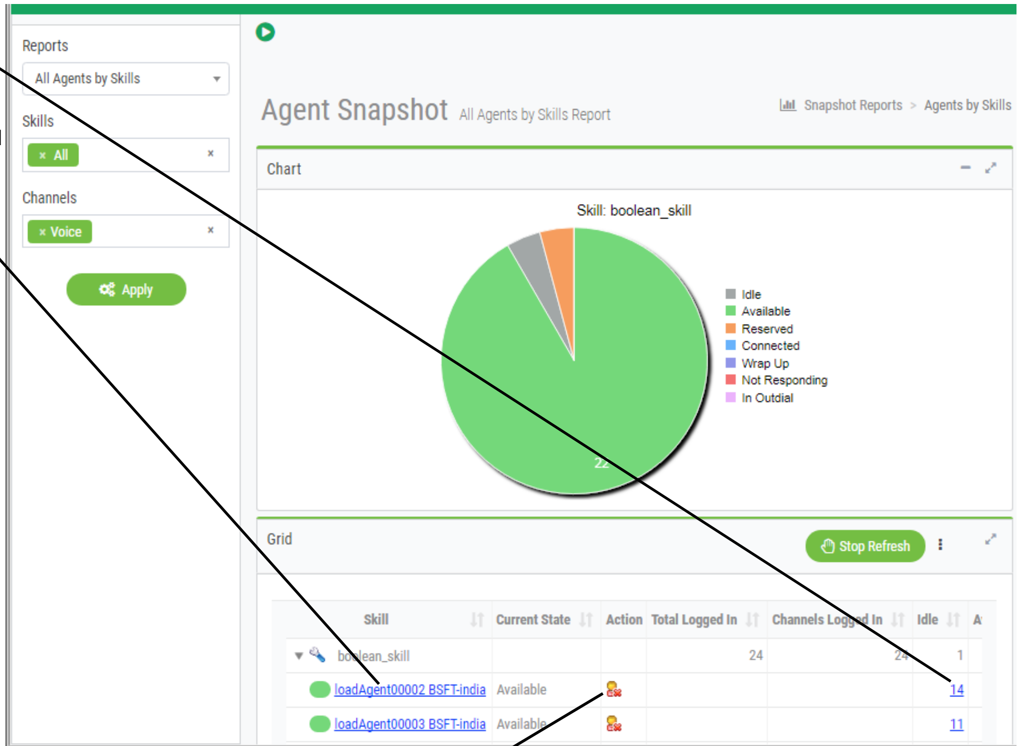
If your enterprise uses the optional skills-based routing feature, you can display the All Agents by Skills report to display real-time agent activity based on the skills they possess.

The report chart displays agent activity for the first skill listed in the report and the grid displays the information described in the following table. If an agent possesses more than one of the skills in the report, that agent's activities are displayed for each skill.

To drill down from the Skill view to the Agent view, click the name of an agent in the **Agent** column of the grid. The Agent view displays call data for that agent. For more information, see "Agent View" on page 228.

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

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



Click this icon to log out the agent.

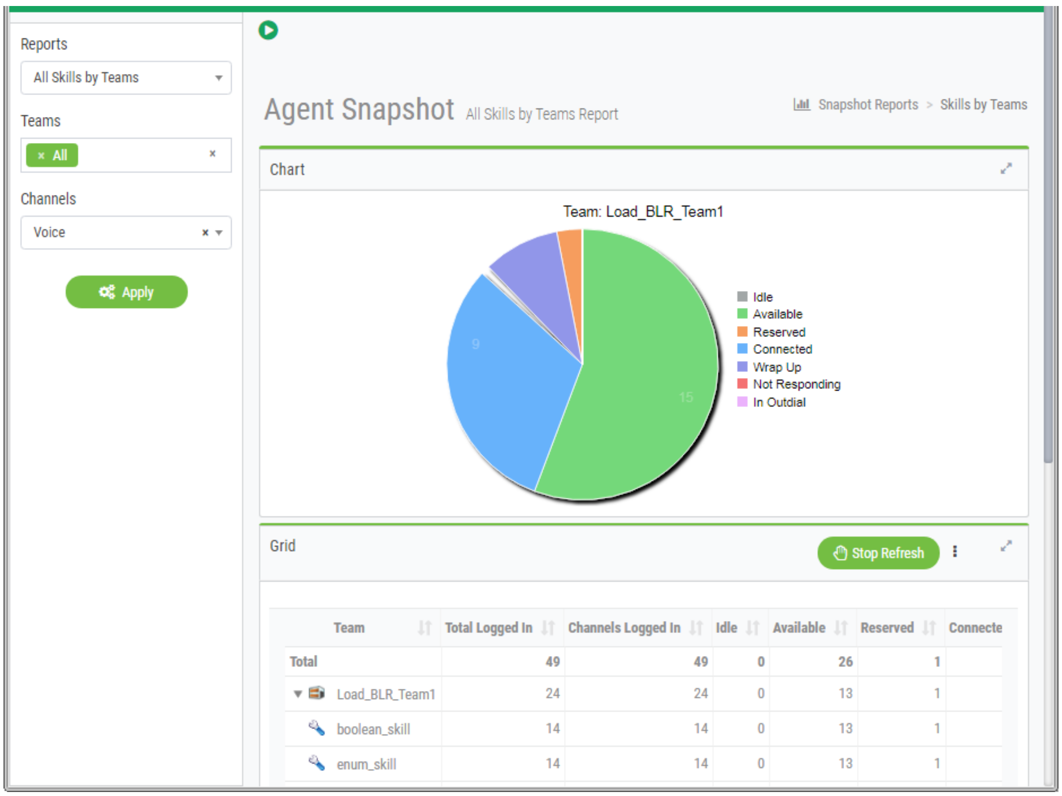
Column	Description
Skill	The name of the skill. • Click a collapse arrow (▼) or expand arrow (▶) next to a skill name to collapse or expand the list of logged-in agents who possess the skill. • Click the name of an agent to drill-down to the Agent view for that agent. • If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse or expand arrow to the left of an agent name to collapse or expand the data grouped by channel type.
Current State	The agent's current state. See the table on page 222 for a description of each state that can appear in this column. If the current state is Idle, the idle code the agent selected is shown in parentheses (no code is shown if the agent has just logged in and has not selected an idle code).
Action	A **Logout** ( ) icon that you can click to log out the agent. For more information, see "Logging Out an Agent" on page 236.
Total Logged In	The total number of agents currently logged in who possess the skill.
Channels Logged In	The number of media channels to which agents who possess the skill are currently logged in.

Column	Description
Idle	In a skill row, the number of agents in the Idle state who possess the skill. In an agent row, the number of times the agent went into the Idle state from a different state. Rest the cursor over a number in this column to display a pop-up showing the idle codes the agent entered and how many times each code was entered. **Note:** Because an agent can change the idle code while in the Idle state, the number of idle codes displayed in the pop-up can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email.
Available	The number of agents in the Available state who possess the skill.
Reserved	The number of agents in the Reserved state who possess the skill.
Connected	The number of agents in the Connected state who possess the skill.
Login Time	The time the agent logged in.
Time in Current State	How long the agent has been in the current state.
Staff Hours	The amount of time the agent has been logged in.
DN	The dial number the agent used to log in to the Agent Desktop.
Queue	If the agent is currently handling a call, the name of the queue that the call came in on.
Calls Handled	The number of calls the agent handled for that skill since logging in. Rest the cursor over a number in this column to display a pop-up showing the wrap-up codes the agent entered and how many times each code was entered.

Skills by Team View

If your enterprise uses the optional skills-based routing feature, you can display the All Skills by Teams report to view real-time agent activity within each team broken down by skills possessed by agents on the teams. The report chart displays a pie chart of agent activity for the team listed first in the report grid.

The grid displays the following information for each team in the report. Note that the counts shown for all skills possessed by a team can exceed the count of logged-in agents because agents can possess multiple skills. However, the totals row displays the actual number of logged-in agents.



Column	Description
Team	The name a team covered in the report. • Click a collapse arrow (▼) or expand arrow (▶) next to a team name to collapse or expand the list of skills possessed by one or more agents on the team. • If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse arrow (▼) or expand arrow (▶) to the left of a skill name to collapse or expand the data grouped by channel type.
Total Logged In	The number of agents currently logged in.
Channels Logged In	The number of media channels to which agents who possess the skill are currently logged in.

Column	Description
Idle	The number of agents currently in the Idle state.
Available	The number of agents currently in the Available state.
Reserved	The number of agents currently in the Reserved state, during which a call is coming in but has not yet been answered.
Connected	The number of agents currently connected to an inbound call.
Talk	The number of agents in the Connected state who are currently talking with a caller.
Hold	The number of agents in the Connected state who have placed the caller on hold.
Consulting	The number of agents currently consulting with another agent.
Wrap Up	The number of agents currently in the Wrap-up state.
Not Responding	The number of agents currently in the Not Responding state.
In Outdial	The number of agents who are connected to or are wrapping up an outdial call.

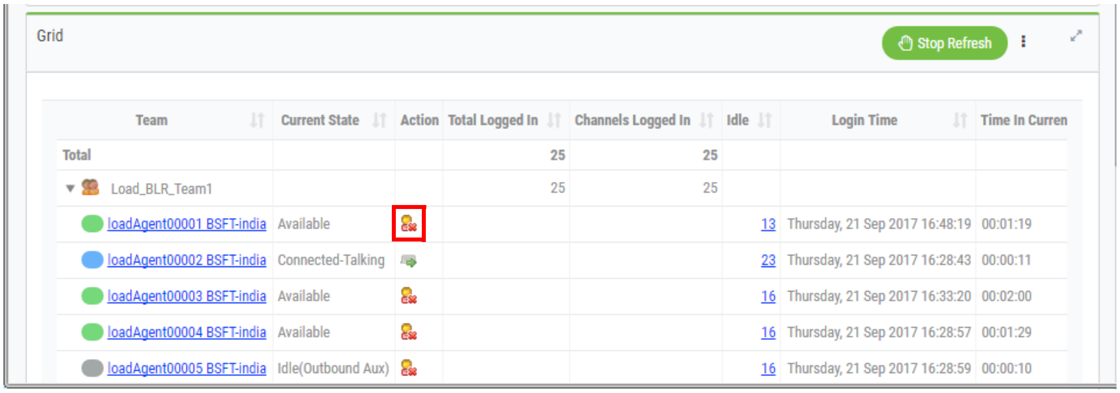
Logging Out an Agent

You can log out an agent from the Team view of an agent snapshot report or from the All Agents by Skills report if your enterprise uses the optional skills-based routing feature:

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

   The default agent snapshot report is displayed.
3. If the appropriate report is not already displayed, do one of the following to display it:
   - To navigate to the Skills view, select **All Agents by Skills** from the **Reports** drop-down list, then select the appropriate skill and click **Apply**.
   - To navigate to the Team view, make sure the AgentSite report is displayed and, if the report does not include the site where the agent is located, select the appropriate site from the Sites drop-down list in the Report Filter panel, click **Apply**, and then click the name of the appropriate team to drill down to the Team view.

4. Click the **Logout** icon in the **Action** column for the appropriate agent.



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

   A message informs you when the agent is successfully logged out. Click **OK** to dismiss the message.

Creating a Custom Agent Snapshot Report

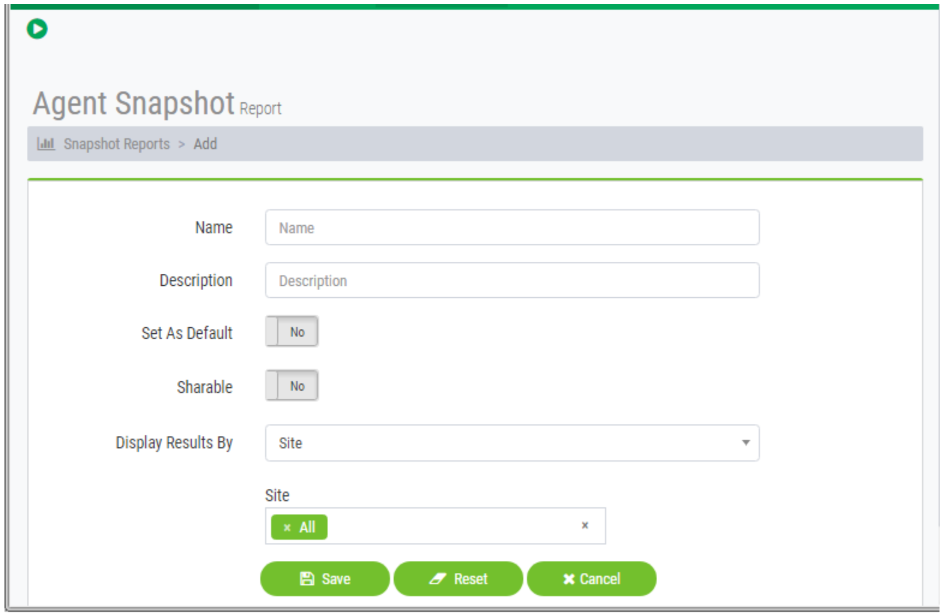
To create a custom real-time agent snapshot report:

1. Open the **Real-Time Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Snapshot Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
   - Click the **New Report** button on the upper left side of the page.

     -OR-

   - To copy an existing report, click the ••• button to the left of a listed report and select **Copy**.
4. On the Add page that appears, specify the settings for the report as described in the following table, and then click **Save**.

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



Setting	Description
Name	Enter a name for the report.
Description	Optionally, enter a short description of the report.
Set As Default	Select **Yes** if you want this report to be displayed the next time you select the **Agent Reports > View Snapshot Reports** link. A multi-team cannot be set as the default. **Note:** You must log out and log in again for the new default to take effect.
Sharable	Select **Yes** if you want everyone who has access to the CJP Real-Time Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by site, team, multi-team, agent, or (if your enterprise uses the optional skills-based routing feature) by skill or skills by team. Then select the sites, teams, agents, or skills you want included in the report. If you selected to display results by **Multi-Team**, you can select multiple teams across sites. A Multi-Team View displays agents in the selected teams by Team. This view displays a maximum of 40 agents per page. Agents for a team can be split across pages. The refresh interval is 30 seconds.

Specifying a Different Default Agent Snapshot Report

When select **Agent Reports > View Snapshot Reports** in the Real-Time Reports module, the default agent snapshot report is displayed.

To specify a different default report:

1. Open the **Real-Time Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Snapshot Reports** from the drop-down list.
3. On the List page that appears, click the ▪▪▪ button to the left of a listed report that is not canned not a multi-team report and select **Set As Default**.

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

Displaying a Real-Time Agent Interval Report

Agent interval reports display cumulative and derived values in half-hour segments since midnight at the site, team, or agent level. If your enterprise uses the optional skills-based routing feature, you can also display data at the team level broken down by skills possessed by the agents on each team in the report.

To display a real-time agent interval report:

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

   A default interval report is displayed.
3. To change the sort order in the grid, click a column header to sort the data by that column, and click it a second time to reverse the sort order. To sort by additional columns, hold down the Ctrl key while you click a second and subsequent headings.

4. To display a different report:

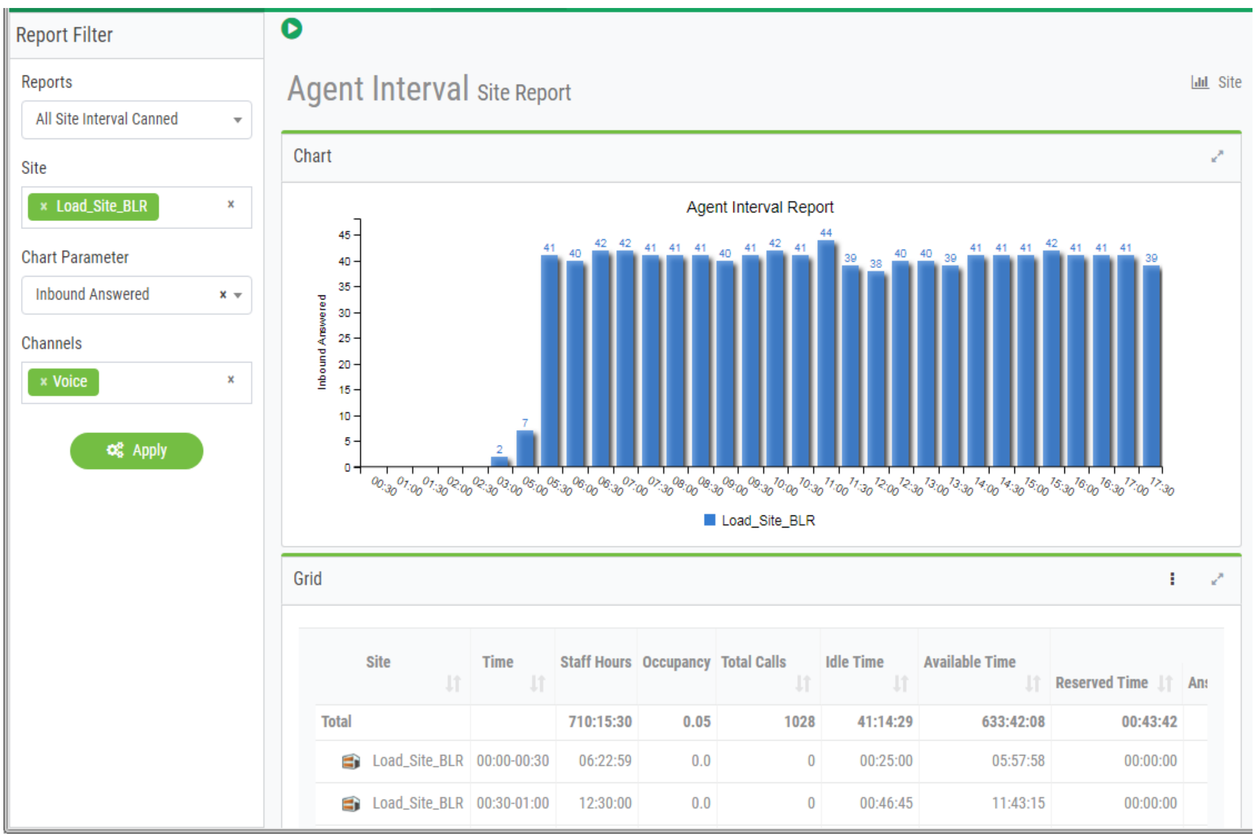
   a. Make a selection from the **Reports** drop-down list.

   b. To display different statistics, select values from the **Sites**, **Teams**, or **Agents** list and, for a skills report, from the **Skills** list.

   c. Select a parameter from the **Chart Parameter** list. This parameter will be displayed in the report chart.

   d. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.

   e. Click **Apply**.



The report chart displays the selected chart parameter (such as number of calls) for each site, team, or skill by team in half-hour segments.

The grid in an agent-level, team-level, or site-level agent interval report displays the following summary information for one or more agents, sites, or teams in half-hour segments.

Column	Description
Site	The name of a site in the report (does not appear in agent-level reports). If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse arrow (▼) or expand arrow (▶) to the left of a site name to collapse or expand the data grouped by channel type.
Team	The name of a team in the report (appears only in team-level and skills reports).
Agent	The name of an agent in the report (appears only in agent-level reports). If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse arrow (▼) or expand arrow (▶) to the left of an agent name to collapse or expand the data grouped by channel type.
Time	The time interval.
Staff Hours	The amount of time the agent was logged in during the time interval.
Occupancy	The measure of time the agent spent on calls compared to available and idle time, calculated by dividing total connected time (inbound connected time plus outdial connected time) plus total wrap up time (inbound wrap up time plus outdial wrap up time) by staff hours.
Total Calls	Inbound Answered calls plus Outdial Attempted calls.
Idle Time	The amount of time agents were in the Idle state during the time interval.
Available Time	The amount of time agents were in the Available state during the time interval.

Column	Description
Inbound	**Reserved Time.** The amount of time agents were in the Reserved state, during which incoming calls were ringing but had not yet been answered.
	Answered Count. The number of inbound calls that were answered by an agent during the time interval.
	Talk Time. The amount of time agents were talking on inbound calls during the time interval.
	Hold Time. The amount of time inbound calls were on hold during the time interval.
	Connected Time. The amount of time inbound calls were connected to an agent during the time interval (inbound talk time plus inbound hold time).
	Wrap Up Time. The amount of time agents spent in the Wrap-up state after an inbound call during the time interval.
	Average Connected Time. Inbound connected time divided by the number of inbound calls that were connected during the time interval.
	Average Handle Time. The average length of time spent handling an inbound call (inbound connected time plus inbound wrap-up time, divided by number of inbound calls).
Not Responding Time	The amount of time agents spent in the Not Responding state during the time interval.
Outdial	**Attempted.** The number of calls that agents initiated during the time interval.
	Connected. The number of outdial calls that were connected to an agent during the time interval.
	Reserved Time. The amount of time agents were in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet.
	Talk Time. The amount of time agents were talking on outdial calls during the time interval.
	Hold Time. The amount of time outdial calls were on hold during the time interval.
	Connected Time. The amount of time outdial calls were connected to an agent during the time interval (outdial talk time plus outdial hold time).
	Wrap Up Time. The amount of time agents spent in the Wrap-up state after an outdial call during the time interval.
	Average Connected Time. Outdial connected time divided by the number of outdial calls that were connected during the time interval.
	Average Handle Time. The average length of time spent handling an outdial call (outdial connected time plus outdial wrap-up time, divided by number of outdial calls).

The grid in a Skills Interval by Team report displays the following summary information for one or more teams and skills in half-hour segments.

Column	Description
Site	The name of a site in the report.
Team	The name of a team in the report.
Skill	The name of a skill assigned to a team or agent on a team covered in the report.
Time	The time interval.
Staff Hours	The amount of time the agent was logged in during the time interval.
Occupancy	The measure of time the agent spent on calls compared to available and idle time, calculated by dividing connected time plus wrap up time by staff hours.
Number of Calls	The number of inbound calls that were connected to the site or team during the time interval.
Talk Time	The amount of time agents were talking with callers during the time interval.
Hold Time	The amount of time callers were on hold during the time interval.
Connected Time	The amount of time inbound calls were connected to an agent during the time interval (talk time plus hold time).
Wrap Up Time	The amount of time agents spent in the Wrap-up state after an inbound call during the time interval.
Average Connected Time	The connected time divided by the number of calls that were connected during the time interval.
Average Handle Time	The average length of time spent handling a call (connected time plus wrap-up time, divided by number of calls).

Viewing Multiple Real-Time Chart Reports

The Real-Time Reports module includes a Chart Reports page that can display up to four charts from your existing real-time call and agent reports.

When you access the Chart Reports page for the first time, the page displays controls for creating a custom multi-chart report so you can create a default report.

Topics covered in this section:

- Displaying Multi-Chart Reports
- Creating a Custom Multi-Chart Report
- Specifying a Different Default Multi-Chart Report

See Also:

- Modifying a Real-Time Report
- Deleting a Real-Time Report

Displaying Multi-Chart Reports

To display a multi-chart report:

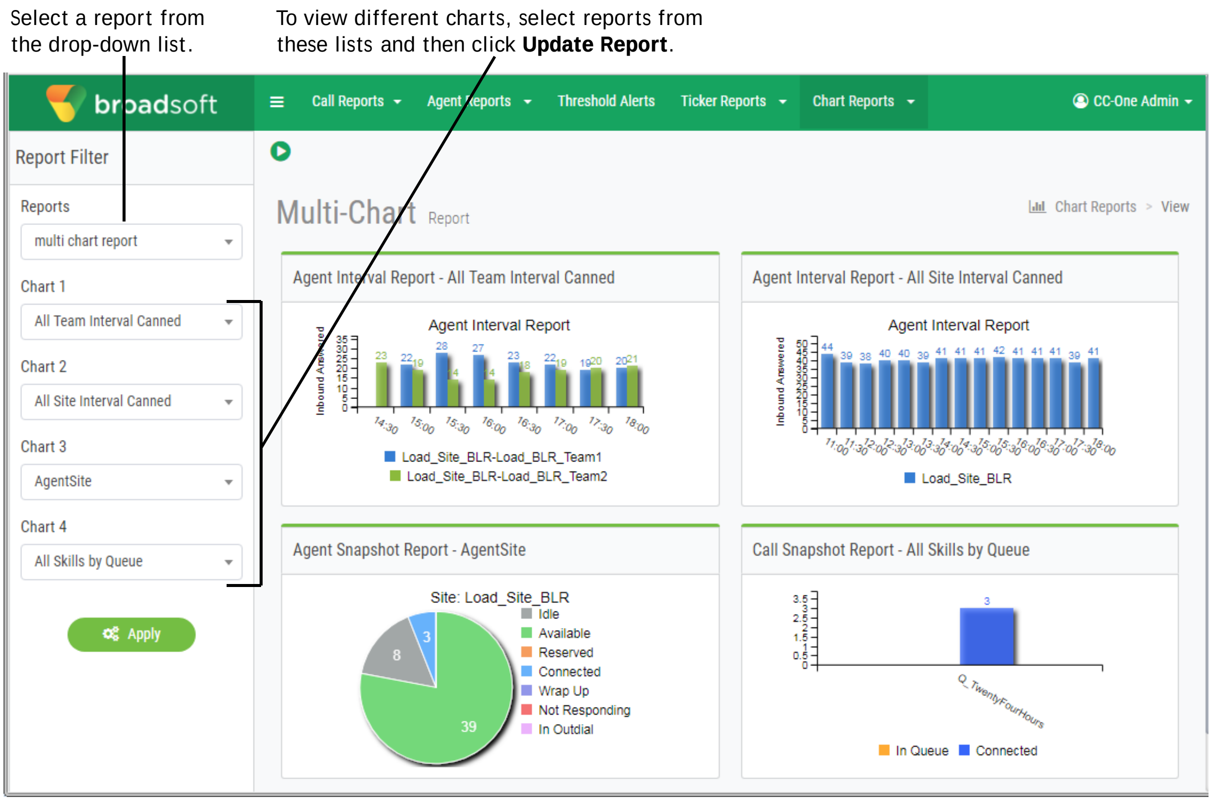
1. Open the **Real-Time Reports** module.
2. Click the **Chart Reports** button on the menu bar and select **View Reports** from the drop-down list.

   The default multi-chart report is displayed.

   -OR-

   If no default report exists, the page displays settings for creating one as described in "Creating a Custom Multi-Chart Report" on page 245 beginning with step 4.
3. To view different charts, do one of the following:
   - Select a report from the **Reports** drop-down list.

     - OR -
   - Select a report from one or more of the **Chart** lists and click **Apply**.



Creating a Custom Multi-Chart Report

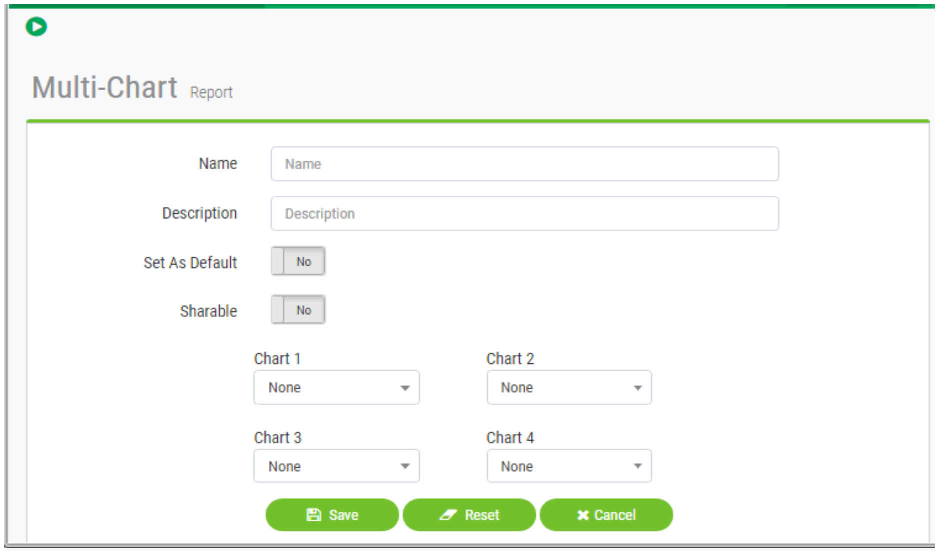
To create a custom multi-chart report:

1. Open the **Real-Time Reports** module.
2. Click the **Chart Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
   - Click the **New Report** button on the upper-left side of the page.

     -OR-
   - To copy an existing report, click the ▪▪▪ button to the left of a listed report and select **Copy**.
4. Enter a name and, optionally, a description for the report in the **Name** and **Description** fields.
5. In the **Set As Default** field, select **Yes** if you want this report to be displayed the next time you access the Multi-Chart Reports page.

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

6. In the **Sharable** field, select **Yes** if you want everyone who has access to the CJP Real-Time Reports module to be able to see the report.
7. Select the reports you want to include from the **Chart** drop-down lists.
8. Click **Save**.



The report appears in the Saved Reports list and is available for selection from the Reports drop-down list on the Multi-Chart Report view page.

Specifying a Different Default Multi-Chart Report

When select **Chart Reports > View Reports** in the Real-Time Reports module, the default multi-chart report is displayed.

To specify a different default report:

1. Open the **Real-Time Reports** module.
2. Click the **Chart Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the ■■■ button to the left of a listed report that is not canned and select **Set As Default**.

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

Modifying a Real-Time Report

Note: Canned reports cannot be modified.

To modify a real-time report:

1. Open the **Real-Time Reports** module and click the relevant button on the menu bar: **Call Reports**, **Agent Reports**, or **Chart Reports**.
2. Select **Customize Snapshot Reports**, **Customize Interval Reports**, or **Customize Reports** from the drop-down list.
3. On the page that appears, click the button to the left of a listed report and select **Edit**.
4. Make the changes you want, and then click **Save**. For information about the available settings, see one of the following topics:

- "Creating a Custom Call Interval Report" on page 215
- "Creating a Custom Call Snapshot Report" on page 217
- "Creating a Custom Agent Snapshot Report" on page 237
- "Creating a Custom Multi-Chart Report" on page 245

Deleting a Real-Time Report

Note: Canned reports cannot be deleted.

To delete a real-time report:

1. Open the **Real-Time Reports** module and click the relevant button on the menu bar: **Call Reports**, **Agent Reports**, or **Chart Reports**.
2. Select **Customize Snapshot Reports**, **Customize Interval Reports**, or **Customize Reports** from the drop-down list.
3. On the page that appears, click the button to the left of a listed report and select **Delete**.

Printing a Report

To print a report, use the Print button on your Web browser.

Exporting Report Data

You can export real-time or historical report data to a data analysis tool such as Microsoft Excel by downloading it in the appropriate format and saving it.

To download report data for export to a data analysis tool:

1. Display the report. For instructions, see one of the following topics:

   - "Displaying a Call Snapshot Report" on page 209
   - "Displaying a Call Interval Report" on page 213
   - "Displaying Agent Snapshot Reports" on page 219
   - "Displaying a Real-Time Agent Interval Report" on page 239
   - "Displaying Historical Call Report Data" on page 260.
   - "Historical Agent Reports" on page 273
   - "Displaying Auxiliary Reports" on page 293
   - "Displaying Historical Skill Reports" on page 297

2. To export the file to comma-separated values (CSV) format:

   a. Click the ⋮ button on the right side of the **Grid** panel header and select **CSV**.

   b. In the dialog box that opens, click **Open** to view the file or **Save** to save the file.

3. To export the file to Microsoft Excel format:

   a. Click the ⋮ button on the right side of the **Grid** panel header and select **Excel**.

   b. In the dialog box that opens, click **Open** or **Save**. The file opens or is saved in the CSV format.

   c. To save the exported data as a Microsoft Excel (.xls) file, open the file and select **Save As** from the Microsoft Excel **File** menu. Then, in the **Save as type** field, select the appropriate Microsoft Excel Workbook format.

Monitoring Threshold Alerts

If your enterprise uses the threshold alerts feature, authorized users can create threshold rules to monitor agent and call data as described in "Threshold Rules" beginning on page 75.

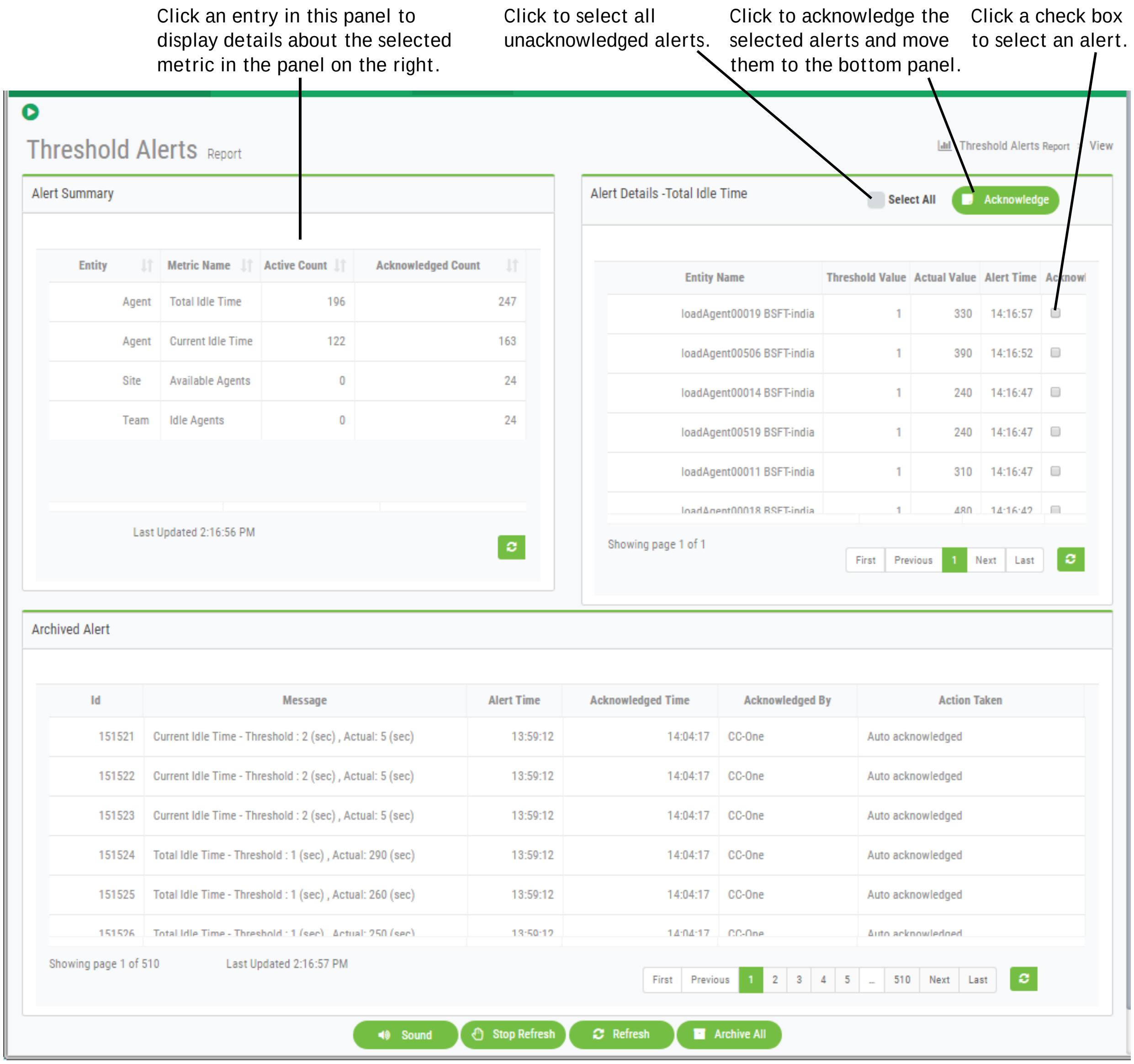
When a threshold is breached, an alert is sent to the Real-Time Reports module where it can be viewed, acknowledged, and archived by authorized users. In addition, a threshold rule can specify one or more email addresses to which alert notifications are sent when a threshold is breached. If a threshold is defined as agent-viewable and is selected in the agent profile assigned to an agent, the agent can display alerts in a separate window by clicking a button on the Agent Desktop (see "Agent Profiles" beginning on page 88).

To monitor threshold:

1. Open the **Real-Time Reports** module and click the **Threshold Alerts** button on the menu bar.

   The page displays three panels. When a threshold is breached, an alert is displayed in the **Alerts Summary** panel.

   - If the threshold is breached multiple times during the time interval specified for the threshold, no additional alerts are displayed. For example, if the time interval specified for the threshold is 300, then only one alert will be sent during each 5-minute interval. If the threshold continues to be breached after the time interval, a new alert is displayed.
   - Every five minutes, the system automatically acknowledges alerts for thresholds that are no longer being breached.
   - A sound is played repeatedly from the time an alert arrives until it is acknowledged. Click the **Mute** button on the lower left side of the page to mute the sound. When you do so, the button changes to a **Sound** button.



2. To acknowledge an alert and optionally provide a comment on action being taken:

   a. Click an entry in the **Alerts Summary** panel to display the alert in the **Alert Details** panel.

   b. Either select one or more check boxes in the **Acknowledge** column or select the **Select All** check box at the top of the **Alert Details** panel.

   c. Click the **Acknowledge** button on the upper right side of the **Alert Details** panel.

      A dialog box appears where you can enter an optional comment, and then either click **OK** or click **Cancel** to cancel the action.

3. To archive acknowledged alerts, click the **Archive All** button at the bottom of the page.

   The alerts are moved to the Archived Alerts panel.

   The system automatically archives acknowledged alerts every fifteen minutes. For CJP Business Edition users, all the alerts for the day are moved from this page to the Threshold Alerts page in the Historical Reports module at midnight (see “Historical Threshold Alerts” on page 303).

4. The data in all three panels is refreshed every 30 seconds as well as whenever you archive an alert.

   - Click the **Refresh** button at the bottom of the page to refresh the data more frequently.

   - Click the **Stop Refresh** button to prevent the data from being refreshed every 30 seconds. When you do so, the button changes to a **Start Refresh** button.

Working with the Ticker

The ticker is a horizontal scrolling text area at the top of the CJP Real-Time Reports pages. The ticker displays the current number of calls in the IVR system for one or more specified entry points, or the number of calls in queue, the number of connected calls, the current service level, and the longest call in queue time for one or more specified queues, sites, and teams.

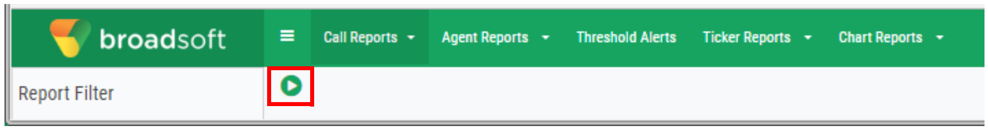
A set of canned tickers is provided so that you can immediately start viewing ticker information when you first open the module. See “Canned Reports and Tickers” on page 198 for more information. You can start or stop the scrolling and customize the ticker to display the key performance indicators that are most important to your operation.

Topics covered in this section:

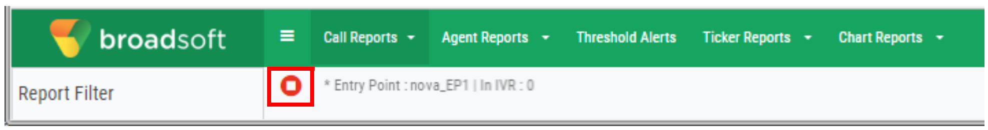
- Starting and Stopping the Ticker
- Creating a New Ticker or Modifying an Existing One
- Deleting a Saved Ticker
- Specifying Which Ticker to Display

Starting and Stopping the Ticker

To start the ticker, click the arrow button located beneath the menu bar on the upper-left side of a real-time report.



The arrow changes to a **Stop** button that you can click to stop the ticker.



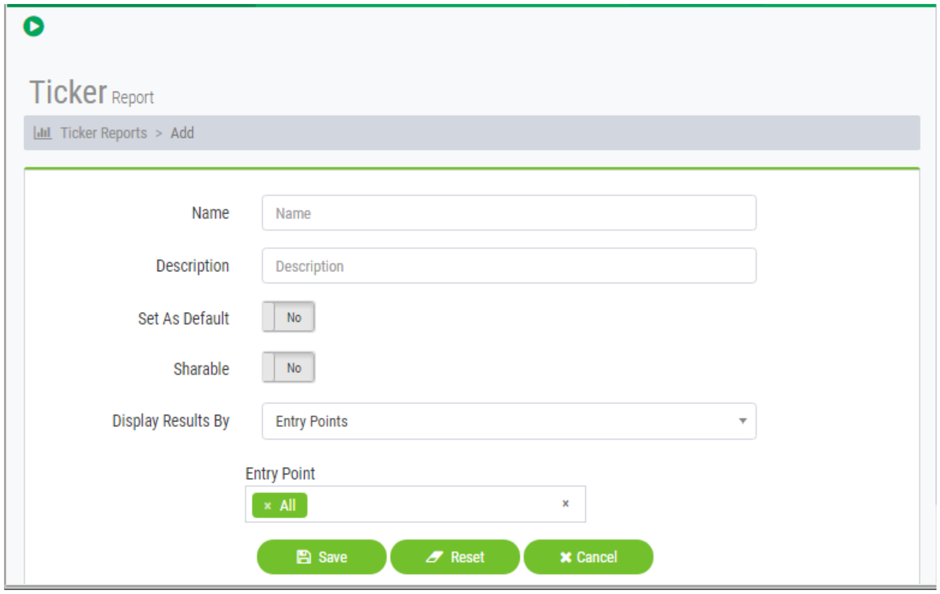
Creating a New Ticker or Modifying an Existing One

To create a new ticker or modify an existing one:

1. Open the **Real-Time Reports** module.
2. Click the **Ticker Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
   - Click the **New Report** button on the upper left side of the page.

     -OR-

   - To copy or modify an existing report, click the ▪▪▪ button to the left of a listed report and select **Copy** or **Edit**.
4. On the page that appears, specify the settings for the report as described in the following table, and then click **Save**.



Setting	Description
Name	Enter a name for the ticker.
Description	Optionally, enter a short description of the ticker.
Set As Default	Select **Yes** if you want this to be the default ticker. A multi-team cannot be set as the default. The default ticker is displayed every time you open the Real-Time Reports module unless you override it for your current session. **Note:** You must log out and log in again for the new default to take effect.
Sharable	Select **Yes** if you want everyone who has access to the CJP Real-Time Reports module to be able to see the report.
Display Results By	If you are creating a new ticker, select a value from the drop-down list to specify whether you want the results to be displayed by Entry Point or Queue. Then, if you are creating or modifying an entry point ticker, select one or more entry points for which you want data to be displayed by the ticker. If you are creating or modifying a queue ticker, select one or more queues, sites, and teams for which you want data to be displayed by the ticker.

Deleting a Saved Ticker

To delete a saved ticker:

1. Open the **Real-Time Reports** module.
2. Click the **Ticker Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the ▪▪▪ button to the left of the ticker you want to delete and select **Delete**.

Specifying Which Ticker to Display

If one or more tickers have been previously created and saved, you can specify which ticker will be displayed on your CJP Real-Time pages by changing the default or by setting a different ticker view for the current session.

To specify a different ticker for display:

1. Open the **Real-Time Reports** module.
2. Click the **Ticker Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the ▪▪▪ button to the left of a listed report and then select a value from the drop-down list:
   - Select **Set View** if you want the selected ticker to be used during the current session only.
   - Select **Set As Default** if you want the selected ticker to be the default ticker.

6 Historical Reports

CJP provides a system-wide view into real-time and historical performance, allowing service levels to be optimized across sites. Reporting is performed on accumulated statistics captured by CJP as it participates in cradle-to-grave management of calls. Users can create their own reports by selecting various data elements to include on a new report.

This chapter describes the available historical report data and explains how to display historical call, agent, skill, and auxiliary reports, as well as how to create and modify custom historical reports. For information on downloading report data to a data analysis tool, see "Exporting Report Data" on page 248 in Chapter 5.

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

Topics covered in this chapter:

- Historical Call Reports
- Historical Agent Reports
- Agent Trace Report
- Auxiliary Reports
- Historical Skill Reports
- Historical Threshold Alerts

See also:

- "CJP Report Parameters" beginning on page 415
- "Sorting, Reordering, and Navigating Report Grids" on page 200

Historical Call Reports

Topics covered in this section:

Available Historical Call Report Data

Historical call reports provide cumulative and derived values for a specified time period and specified entry points, queues, sites, or teams. In addition, the *All DN Canned* report displays the calls that came into the system because of specific DNs (dialed numbers).

The parameters available for display in call reports are described in the following topics:

- "Real-Time and Historical Parameters for Entry Points" on page 204.
- "Real-Time and Historical Parameters for Queues, Sites, and Teams" on page 205

See also "Differences Between Queue-Level versus Site and Team-Level Data in Reports" on page 209.

In addition, you can drill down to display the call details for individual calls during a half-hour time period by selecting a date in the report grid, and then making a selection from the **Time** column. Or you can export the call details for all time periods during a selected day by clicking the *Show CDR* link on the grid panel header (see "Displaying Historical Call Report Data" beginning on page 260).

The following call detail record (CDR) parameters are available in the Call Details view for an entry point or queue.

You can click a link in the S. No (sequence number) column in either an entry point or queue CDR to open a window that displays a tree view of the history of that call throughout its life cycle—the tree view displays all the parameters described in the following table.

Note: To view call data based on skill requirements, see "Displaying Historical Skill Reports" on page 297 and "Data Available in a Skills by Queues Report" on page 299.

Parameter	Description	Entry Point CDR	Queue CDR
S No.	A sequence number identifying each leg of a call as it moves through the CJP system. Click an entry in this column to open a window displaying the history of the call throughout its life cycle.	X	X
ANI	The ANI digits delivered with the call. ANI, or Automatic Number Identification, is a service provided by the phone company that delivers the caller's phone number along with the call.	X	X
DNIS	The DNIS digits delivered with the call. DNIS, or Dialed Number Identification Service, is a service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.	X	X
Entry Point	The name of the entry point associated with the call.	X	
Queue	The name of the queue associated with the call.	X	X
Site	The contact center location to which the call was distributed.	X	X
Team	The name of the team to which the call was distributed.	X	X
Agent	The name of the agent who handled the call or a numeric ID code if the call was handled by a capacity-based team resource instead of by a CJP agent.	X	X
Call Start Time	The time the call arrived at the entry point or queue.	X	X
Call End Time	The time the call was terminated.	X	X
Agent Start Time	The time the agent picked up the phone and began talking with the caller.		X
Call Duration	The amount of time between when the call arrived at the entry point or queue and when it was terminated.	X	X
IVR Time	The amount of time the call was in the IVR system.	X	X
Queue Time	The amount of time the call was in a queue waiting to be sent to a destination site.	X	X
Connected Time	The total amount of time the call was connected to an agent (talk time plus hold time).	X	X
Hold Time	The amount of time the call was on hold in this queue (for a queue CDR) or in all underlying queues (for an entry point CDR).	X	X
Wrap Up Time	The amount of time an agent spent in the Wrap-up state after handling the call.	X	X
Handle Time	The amount of time spent handling the call (connected time plus wrap-up time).	X	X
Consult Time	The amount of time an agent spent consulting with another agent while handling this call.	X	X
Conference Time	The amount of time an agent spent in conference with the caller and another agent.	X	X

Parameter	Description	Entry Point CDR	Queue CDR
CTQ Request Time	The amount of time between when consult-to-queue requests were initiated and when the consultations ended during the call.	X	X
Hold Count	The number of times the call was put on hold.		X
Consult Count	The number of times the agent consulted another agent during the call.		X
Conference Count	The number of times the agent established a conference call with the caller and another agent.		X
Blind Transfer Count	The number of times the call was transferred out of the queue by the agent without consulting first.		X
CTQ Request Count	The number of times consult-to-queue requests were initiated during the call.	X	X
No. of Transfers	The number of times the call was transferred by an agent.	X	X
Transferred Number	The phone number to which the agent transferred the call in an agent-to-DN transfer. This parameter appears in the CCDR window that opens when you click an entry in the S No. (sequence number) column of either an entry point or queue CDR as described in step 7 on page 265.		
Consult Errors	The number of times agents did not respond to a consult invitation.		X
Transfer Errors	The number of times an error occurred during the transfer process.		X
Handle Type	How the call was handled. Possible values: • **park.** The call was queued in the CJP network and subsequently ended without being distributed to a site. • **park_and_transfer**. The call was queued in the CJP network and subsequently distributed to a site. • **straight_transfer.** The call was distributed to a site upon arrival without being queued in the CJP network. • **ivr.** The call was handled by the IVR but the caller disconnected before the call was transferred or parked. • **unknown.** This is the default value when no other value overrides it.		X

Parameter	Description	Entry Point CDR	Queue CDR
Termination Type	How the call was terminated. Possible values: • **abandoned.** The call was terminated before being distributed to a destination site, but was in the system for longer than the time specified in the Short Call threshold provisioned for the enterprise. • **agent_transfer.** The call was transferred from one agent to another. • **transfer_error.** The call could not be transferred to the agent. • **normal.** The call ended normally. • **reclassified.** The call was sent to another entry point. • **transferred.** The call was transferred by an agent. • **self_service.** The call ended in the IVR. • **short_call.** The call was never connected and the total duration of the call was less than the specified Short Call threshold. • **quick_disconnect.** The call was connected, but the agent talk time for the call was less than the specified Sudden Disconnect threshold. • **overflow.** The call was transferred to the overflow destination number provisioned for the queue—typically because the call was queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent.	X	X
Terminating Party	Whether the call was terminated by the agent or the caller.	X	
Record Flag	Whether or not the call was recorded by CJP through the optional Call Recording feature.		X

Parameter	Description	Entry Point CDR	Queue CDR
Monitor Flag	Whether or not the call was monitored, coached, or barged in on. Possible values: • **Not Monitored.** The call was not monitored • **Monitored.** The call was monitored. • **Whisper-Coach.** While the call was being monitored, the monitoring supervisor coached the agent, but did not barge in on the call. • **Barged-In.** While the call was being monitored, the monitoring supervisor barged in on the call.The supervisor might have also coached the agent. (If the call was both coached and barged-in on, the value of this parameter is *Barged-In*). For information about monitoring, see Chapter 7, "Call Monitoring," beginning on page 307.	X	X
Wrap Up	The wrap-up code that the agent gave for the call. Note that if the agent wraps up the call after the CDR is generated, the corresponding CDR will be updated after the agent selects the wrap-up code for that call.		X
Session ID	A value assigned by the system that uniquely identifies a call during its life cycle.	X	X

Displaying Historical Call Report Data

When you open the Historical Reports module, a default report displays the summary view of cumulative and derived values for the last seven days for entry points, queues, sites, or teams to which you have access privileges. From the summary view, you can drill down to a daily view that displays values in half-hour intervals for any day in the report. From the daily view, you can drill down to display the call details for all calls within any half-hour segment.

Alternatively, you can display a summary report that provide a monthly total for each selected queue, site, or team for a time interval of up 13 months; from this report, you can drill down to a summary view displaying each day in the month, and from there to a single daily view, and then to a call details view.

Summary and daily views include both charts and grids in panels that can be maximized and minimized as described in "Showing and Hiding Report Panels" on page 199.

In a grid panel, you can click a column header to sort the data by that column, and click it again to reverse the sort order. To sort by additional columns, hold down the Ctrl key while you click a second and subsequent headings.

Note:

- Date and time values in reports are based on the time zone provisioned for your enterprise (typically headquarters), *not* the local time zone for the sites and teams.
- Because some report parameters are not meaningful for outdial calls, CJP recommends that you view inbound and outdial call data separately.

To display historical call report data:

1. Open the **Historical Reports** module.

   The default Historical Reports page appears.

2. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel on the left side of the page.

3. To display different statistics, select the settings you want from the lists in the Report Filter panel:

   a. Select a value from the **Display Results By** list to specify whether you want to display results by entry point, queue, site, team, or, if you are displaying the *All DN Canned* report, by DN.

      When you select **DN**, an additional field is displayed where you can enter one or more DNs separated by commas.

      When you select **Site** or **Team**, additional buttons appear:

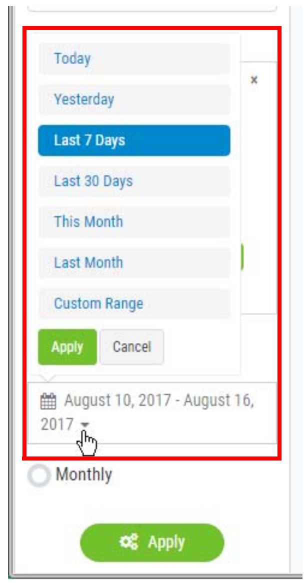
      - **All Queues.** Select this option if you want display a daily summary report for selected sites or teams across all queues. Note that you cannot drill down to a daily or call details view from the report.

      - **Specify.** Select this option if you want to display a report that includes only those queues that you select, and the site or team data will be displayed by queue.

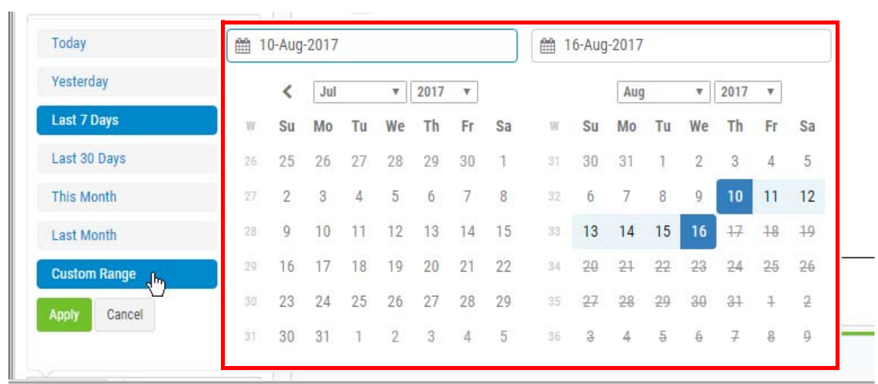
   b. Select one or more entry points, queues, sites, or teams that you want included in the report, or use the default **All** setting if available.

   c. Select the parameter from the **Chart Parameter** list that you want to be displayed in the chart, and select the parameters from the **Grid Parameter** list that you want to be displayed as columns in the grid. For an explanation of the available parameters, see "Call Interval Report Parameters" on page 203.

d. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.



When you select **Custom Range**, additional controls appear for you to specify a date range of up to 92 days. Use the calendar controls to select start and end dates or type dates into the two fields.

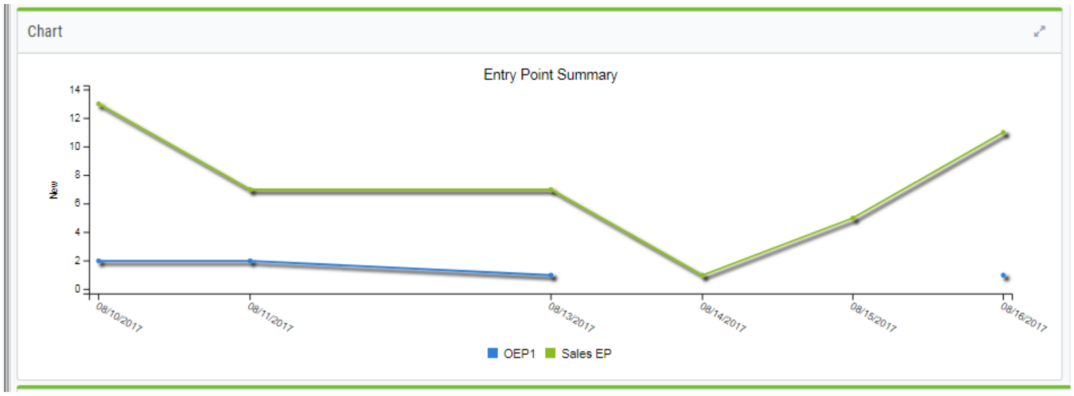


e. To create a monthly report, click the **Monthly** button and select a number between 1 and 13. Monthly reports provide monthly totals for each selected queue, site, or team, without providing a row of data for each day of the month

f. Click **Apply** to view the report.

The top part of the report displays a chart summarizing completed calls during the report interval. Following is an example of a chart displaying new calls for two entry points.

Note: If the chart cannot be displayed, an error message appears instructing you to select fewer entities or limit the time duration. The chart can display up to 15 entities.



The bottom part of the report displays daily or monthly data for each entry point, queue, site, or team, depending on the criteria you selected for the report. Following is an example of a report displaying daily results for two entry points.

Click a date in the **Date** column to drill down to a half-hourly view of data for that day.

Grid

Entry Point	Date	Total	New	Transferred In	From Entry Point	IVR Ended	Short	To Queue	To Entry Point	IVR Time
Total		50	50	0	0	0	22	42	0	00:11:41
OEP1	10-Aug-17	2	2	0	0	0	2	2	0	00:00:00
OEP1	11-Aug-17	2	2	0	0	0	2	0	0	00:00:00
OEP1	13-Aug-17	1	1	0	0	0	0	1	0	00:00:00
OEP1	16-Aug-17	1	1	0	0	0	0	1	0	00:00:00
Sales EP	10-Aug-17	13	13	0	0	0	6	8	0	00:02:49
Sales EP	11-Aug-17	7	7	0	0	0	0	7	0	00:01:45
Sales EP	13-Aug-17	7	7	0	0	0	0	7	0	00:01:57
Sales EP	14-Aug-17	1	1	0	0	0	1	1	0	00:00:09

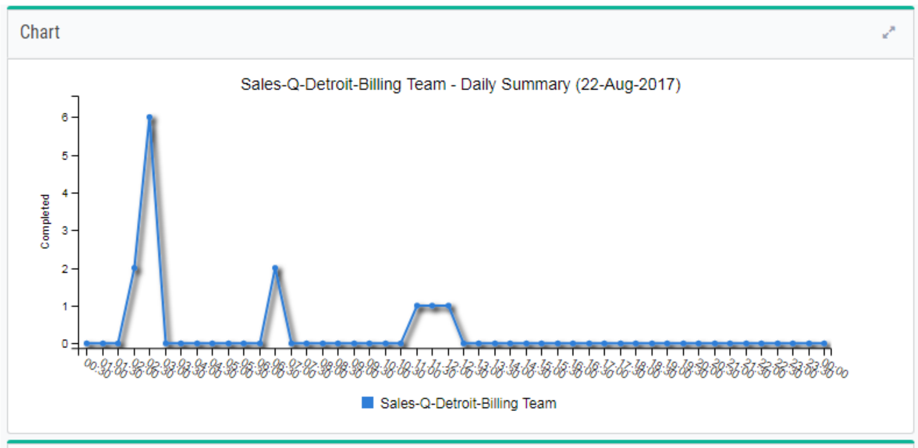
You can click a column header to sort the data by that column, and click it a second time to reverse the sort order of the data. To sort by additional columns, hold down the Ctrl key while you click a second and subsequent headings.

The grid can display up to 100 rows on a page. If more than one page of data is available, controls at the bottom of the grid provide access to other pages.

4. If you are viewing a monthly summary report, you can drill down to a daily summary view of data for a specific DN, entry point, queue, site, or team (depending on the criteria you selected for the report), by clicking a month in the **Date** column.

If you are viewing a daily summary report, you can drill down to a half-hourly view of data by clicking a date in the **Date** column.

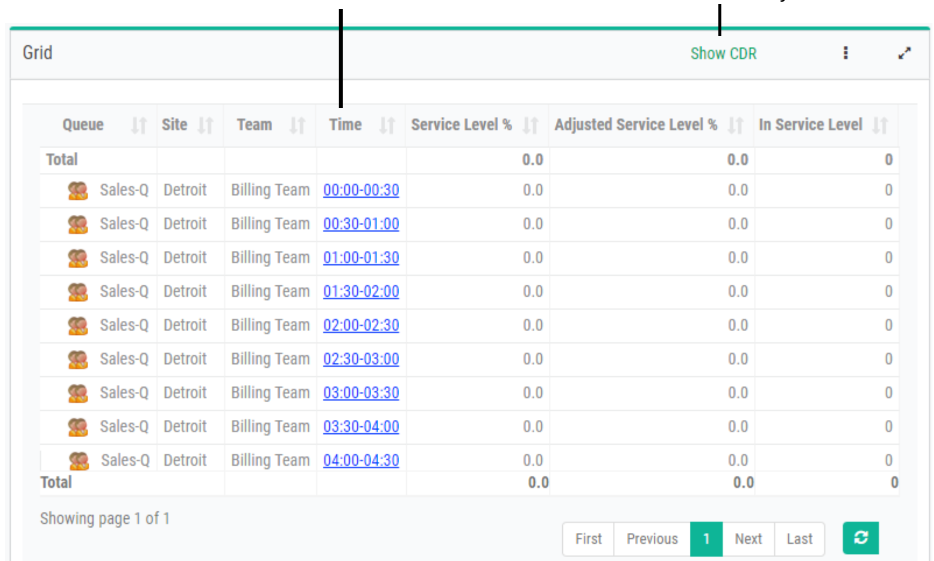
The upper part of the report displays a daily summary chart, as shown in the following example.



The bottom part of the report displays values in half-hour segments for the day, as shown in the following example.

Click an entry in the **Time** column to drill down to view call details for that half-hour interval.

Click the **Show CDR** link to export call details for the entire day.



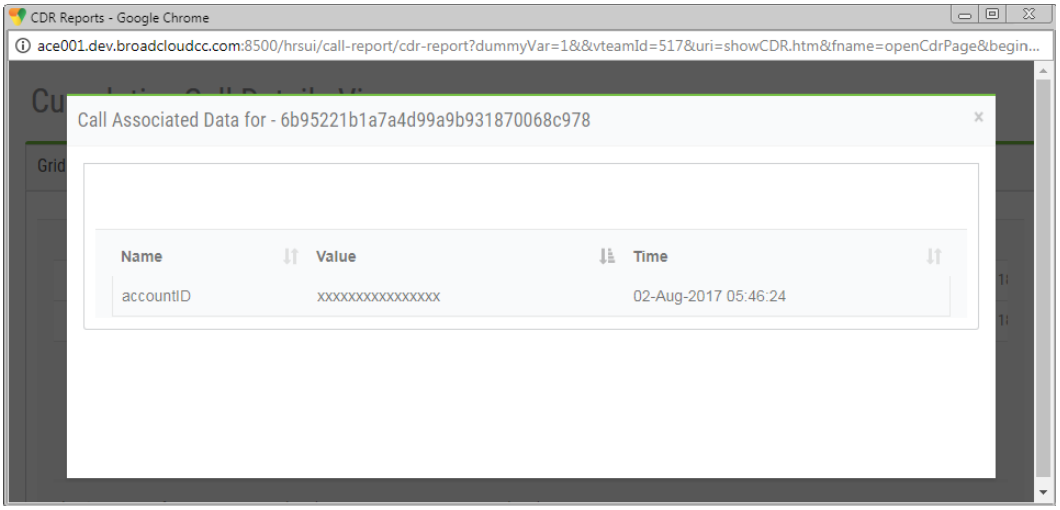
Queue	Site	Team	Time	Service Level %	Adjusted Service Level %	In Service Level
Total				0.0	0.0	0
Sales-Q	Detroit	Billing Team	00:00-00:30	0.0	0.0	0
Sales-Q	Detroit	Billing Team	00:30-01:00	0.0	0.0	0
Sales-Q	Detroit	Billing Team	01:00-01:30	0.0	0.0	0
Sales-Q	Detroit	Billing Team	01:30-02:00	0.0	0.0	0
Sales-Q	Detroit	Billing Team	02:00-02:30	0.0	0.0	0
Sales-Q	Detroit	Billing Team	02:30-03:00	0.0	0.0	0
Sales-Q	Detroit	Billing Team	03:00-03:30	0.0	0.0	0
Sales-Q	Detroit	Billing Team	03:30-04:00	0.0	0.0	0
Sales-Q	Detroit	Billing Team	04:00-04:30	0.0	0.0	0
Total				0.0	0.0	0

5. To view call details, click an entry in the **Time** column.

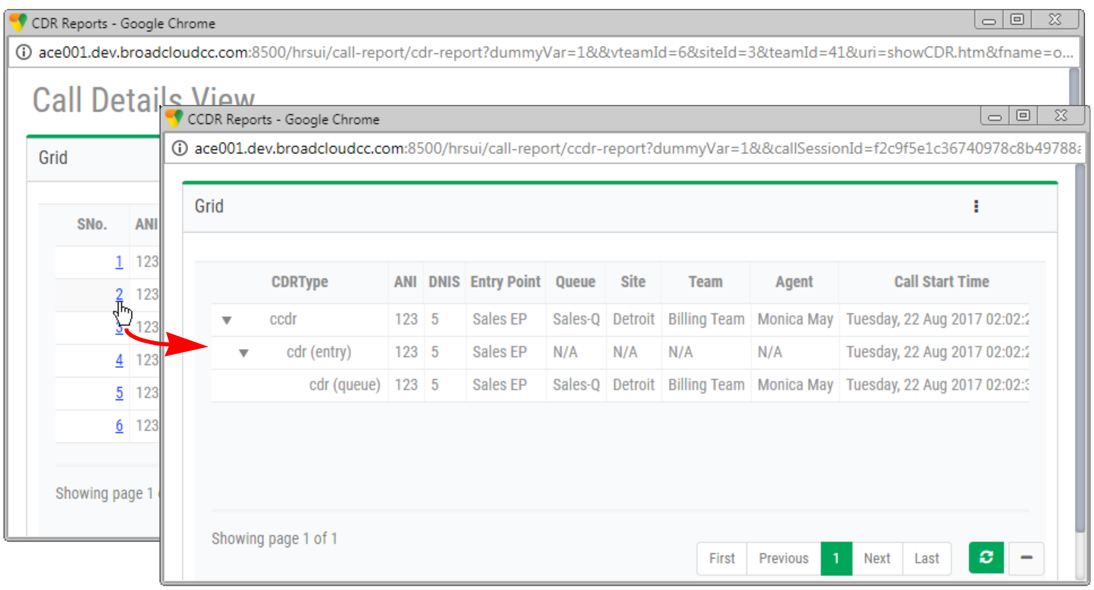
   The CDR Report window opens, displaying cumulative call details (for an entry point report) or call details (for a queue report) for all calls in the half-hour time interval you selected. For a description of each parameter that can appear in a call details view, see "Available Historical Call Report Data" on page 256.

   To export call details for the entire day, click the **Show CDR** link on the grid panel header.

6. From the CCDR view, you can display call-associated data (CAD) collected for a call by clicking an entry in the **Entry Point** column.



7. From a CCDR view or a CDR view, you can click an entry in the **S No.** (sequence number) column to open a window displaying the history of that call throughout its life cycle.



As shown in the above example, the window can display a hierarchy of up to four CDR types, depending on what happened to the call.

CDR Type	Description
ccdr	The cumulative CDR (CCDR) represents the complete life cycle of an external call at a very high level, from the time it arrived at an entry point until it was terminated.

CDR Type	Description
cdr (entry point)	The CDR for an entry point represents the history of the call from the time it arrived at the entry point—either as a new, external call or as a call transferred from another entry point or queue—until it left the underlying queues either by terminating or by being transferred out of a queue to another entry point.
cdr (queue)	The CDR for a queue represents the history of the call from the time it entered the queue until the call was either terminated or transferred out of the queue. A queue CDR can have multiple legs, which are represented by segment detail records (SDRs).
sdr	When an agent transfers a call to another agent, a segment detail record (SDR) is created for each leg of the call. In the above example, one agent-to-agent transfer took place, resulting in sdr (1) and sdr (2).

Creating a Custom Historical Call Report

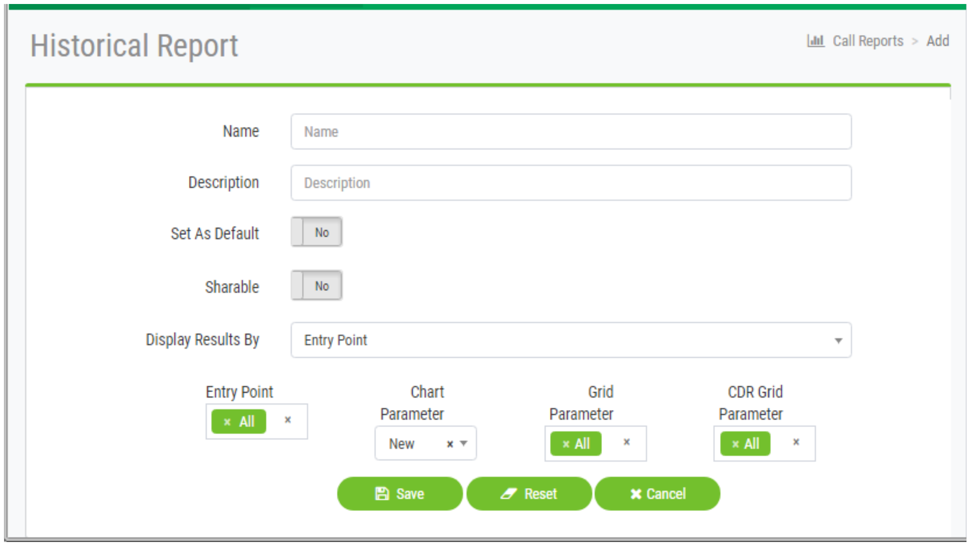
To create a custom historical call report:

1. Open the **Historical Reports** module. The Call Reports default page appears.
2. Click the **Call Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
   - Click the **New Report** button on the upper-left side of the page.

     -OR-
   - To copy an existing report, click the ■■■ button to the left of a listed report and select **Copy**.
4. On the page that appears, specify the settings for the report as described in the following table, and then click **Save**.

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

   Note: After saving a default custom report, wait 10 to 15 seconds before logging out. Otherwise, your parameter settings might not be saved.



Setting	Description
Name	Enter a name for the report.
Description	Optionally, enter a short description of the report.
Set as Default	Select **Yes** if you want this report to be displayed when you open the Historical Reports module. **Note:** You must log out and log in again for the new default to take effect.
Sharable	Select **Yes** if you want everyone who has access to the CJP Historical Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by entry point, queue, site, or team, and then select the entry points, queues, sites, or teams you want included in the report.
Chart Parameter	Select the single parameter that you want displayed in the report chart.
Grid Parameter	Select the parameters that you want displayed as columns in the summary and daily report views. For an explanation of the available parameters, see "Call Interval Report Parameters" on page 203.
CDR Grid Parameter	Select the parameters to be displayed as columns in the call details view. For an explanation of the available parameters, see "Available Historical Call Report Data" on page 256.

Modifying a Historical Call Report

Note: Canned reports cannot be modified.

To modify a historical call report:

1. Open the **Historical Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the ▪▪▪ button to the left of a listed report and select **Edit**.
4. Make the changes you want. For information about the available settings, see "Creating a Custom Historical Call Report" on page 266.
5. Click **Save** to save your changes.
6. To view the report, click the ▪▪▪ button to the left the listed report and select **View**.

Deleting a Historical Call Report

Note: Canned reports cannot be deleted.

To delete a historical call report:

1. Open the **Historical Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the ▪▪▪ button to the left of the report you want to delete and select **Delete**.

Specifying a Different Default Historical Call Report

When you open the Historical Reports module, the default report appears.

To specify a different default historical call report:

1. Open the **Historical Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, click the ▪▪▪ button to the left of a listed report that is not canned and select **Set as Default**.

Monitored Calls Reports

Monitored Calls reports enabled authorized users to display historical views of call monitoring sessions.

To view a monitored calls report:

1. Open **Historical Reports** module.
2. Click the **Call Reports** button on the menu bar and select **Monitored Calls** from the drop-down list.

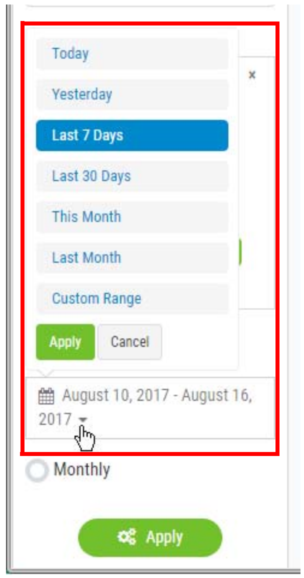
   The default Monitored Calls page is displayed.
3. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel on the left side of the page.
4. To display different statistics, select the settings you want from the lists in the Report Filter panel:

   a. Select a value from the **Display Results By** list to specify whether you want to display results by queue, site, or team.

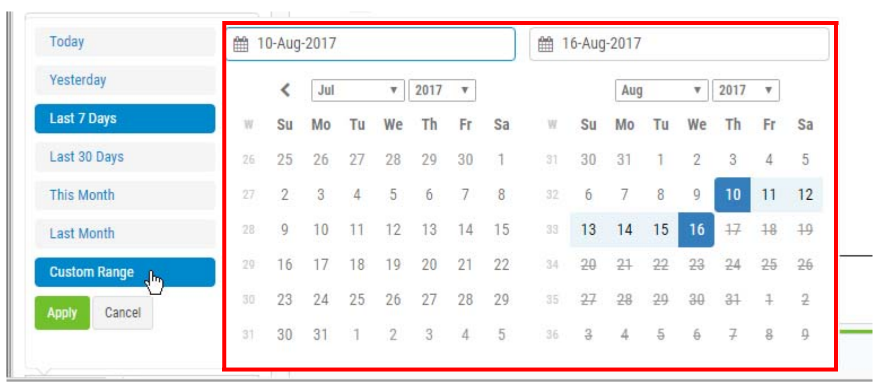
   b. Select one or more queues, sites, or teams that you want included in the report, or use the default **All** setting.

   c. Select a parameter for the report chart.

d. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select the time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days, This Month**, **Last Month**, or **Custom Range**.



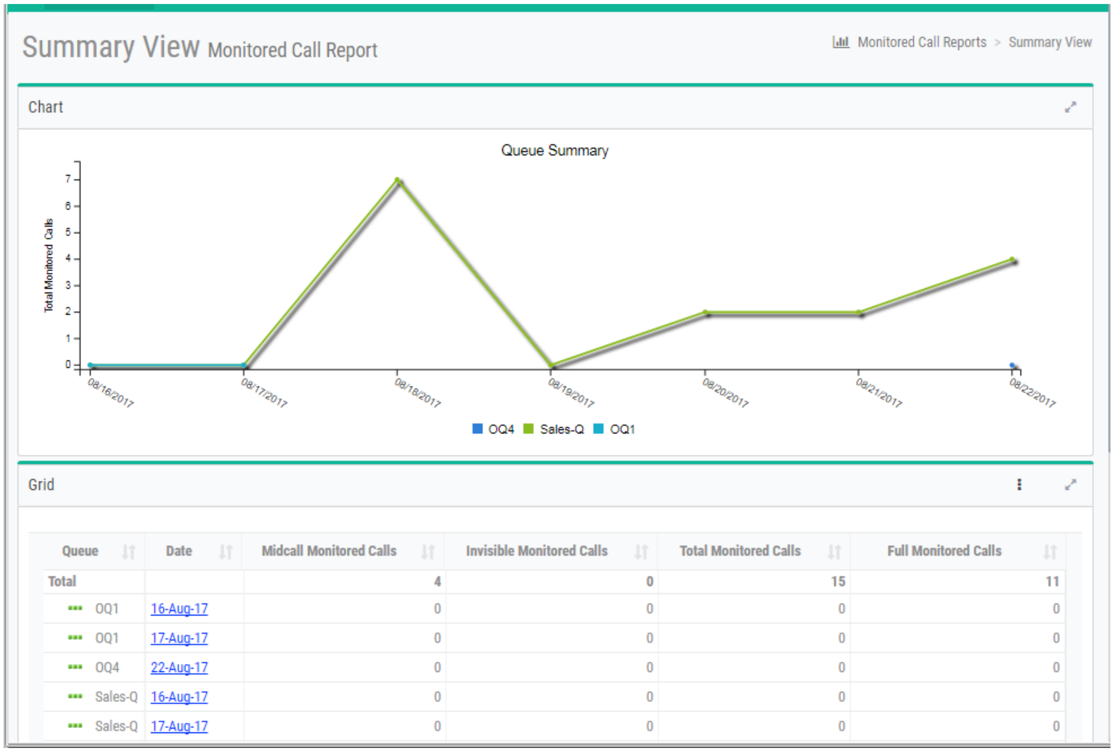
When you select **Custom Range**, additional controls appear for you to specify a date range of up to 92 days. Use the calendar controls to select start and end dates or type dates into the two fields.



e. To create a monthly report, click the **Monthly** button and select a number between 1 and 13.

f. Click **Apply** to view the report.

The summary view displays the information described in the following table.

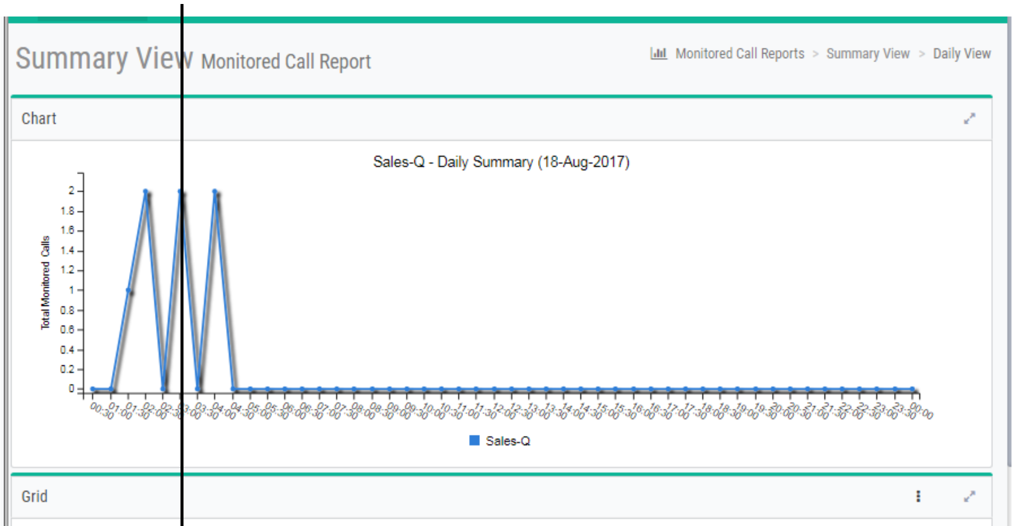


Column	Description
Queue/Site/Team	The name of the queue, site, or team that was monitored.
Month	A month in the report. This column appears only when you specify a Monthly time interval.
Date	A date in the report. This column appears when you select a Daily time period or when you drill down on an entry in the **Month** column of a monthly report.
Full Monitored Calls	The number of calls that were monitored from beginning to end.
Midcall Monitored Calls	The number of calls for which monitoring began after the call was already in progress.
Invisible Monitored Calls	The number of calls that were monitored using the Invisible mode, which prevents the monitoring session from being displayed on Management Portals other than that of the initiating supervisor.
Total Monitored Calls	The total number of calls monitored during the interval.

5. If you selected a Monthly time period, you can click an entry in the **Month** column to drill down to a view displaying information for each day in that month.

   If you selected any other time period, you can click an entry in the **Date** column to drill down to the Daily View displaying information in half-hour segments.

Click a time entry to drill down to call details for all the calls within that time interval.



Queue	Time	Midcall Monitored Calls	Invisible Monitored Calls	Total Monitored Calls	Full Monitored Calls
Total		4	0	7	3
Sales-Q	00:00-00:30	0	0	0	0
Sales-Q	00:30-01:00	0	0	0	0
Sales-Q	01:00-01:30	0	0	1	1
Sales-Q	01:30-02:00	1	0	2	1
Sales-Q	02:00-02:30	0	0	0	0
Sales-Q	02:30-03:00	1	0	2	1

6. From the Daily View, click an entry in the **Time** column to display call details for all calls in the half-hour time interval you selected.

   The Call Monitoring Details View opens in a separate window, displaying the call detail parameters described in the table beginning on page 257 as well as two additional parameters: *Supervisor Name*, which displays the name of the supervisor who monitored the call, and *Invisible Monitoring*, which specifies whether or not the call was monitored using the Invisible mode.

Historical Agent Reports

Historical agent reports provide summary views of monthly or daily agent activity at the site, team, or agent level for a specified time period. From summary views, you can drill down to display half-hourly interval reports or agent detail reports. From an agent detail report, you can display detailed information about the calls the agent handled on the day covered in the report.

Note: Historical agent team reports are available only for agent-based teams.

Topics covered in this section:

To view agent activity based on skill requirements for the calls the agents handled, see "Displaying Historical Skill Reports" on page 297.

Data Available in Historical Agent Summary and Interval Reports

In historical agent summary and interval reports, the report chart displays data based on the chart parameter you selected. The report grid displays the summary information described in the following table for one or more sites, teams, or agents.

Column	Description
Date	In a summary report, this column displays the name of an agent, team, or site along with the dates on which activities occurred. Click a collapse arrow (▼) or expand arrow (▶) next to the name of an agent, site, or team to collapse or expand the list of dates. If your enterprise uses the Multimedia feature and more than one media channel appears in the report, you can click the collapse arrow (▼) or expand arrow (▶) to the left of a date to collapse or expand the channel details.

Column	Description
Time	In an interval report, this column displays the time interval. If your enterprise uses the Multimedia feature and more than one media channel appears in the report, you can click a collapse arrow ( ) or expand arrow ( ) to the left of a date to collapse or expand the channel details.
Login Count	Total number of times an agent logged in on that day. Appears only if **Agents** is selected in the **Display Results By** drop-down list.
Calls Handled	The total number of inbound and outdial calls handled.
Staff Hours	The total amount of time agents were logged in.
Initial Login Time	The date and time the agent logged in. This column appears only in agent-level summary reports.
Final Logout Time	The date and time the agent logged out. This column appears only in agent-level summary reports.
Occupancy	The measure of time agents spent on calls compared to available and idle time (Total Inbound Connected Time + Total Wrap Up Time + Total Outdial Connected Time + Total Outdial Wrap Up Time, divided by Staff Hours).
Idle	**Count.** The number of times an agent went into the Idle state. **Total Time.** The total amount of time agents spent in the Idle state. **Average Time.** The average length of time agents were in the Idle state (Total Idle Time divided by Idle Count).
Available	**Count.** The number of times an agent went into the Available state. **Total Time.** The total amount of time agents spent in the Available state. **Average Time.** The average length of time agents were in the Available state (Total Available Time divided by Available Count).
Inbound Reserved	**Count.** The number of times an agent went into the Inbound Reserved state. **Total Time.** The total amount of time agents spent in the Reserved state, during which a call is coming in to an agent’s station but has not yet been answered. **Average Time.** The average length of time agents were in the Inbound Reserved state (Total Available Time divided by Available Count).

Column	Description
Inbound Connected	**Hold Count.** The number of times an agent put an inbound caller on hold. **Connected Count.** The number of inbound calls that were connected to an agent. **Total Talk Time.** The total amount of time an agent was talking with a caller. **Total Hold Time.** The total amount of time inbound calls were on hold. **Total Time.** The total amount of time agents were connected to inbound calls. **Average Hold Time.** The average hold time for inbound calls (Total Hold Time divided by Hold Count). **Average Time.** The average inbound connected time (Total Time divided by Connected Count).
Outdial Reserved	**Count.** The number of times an agent was in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet. **Total Time.** The total amount of time agents were in the Outdial Reserved state **Average Time.** The average amount of time agents were in the Outdial Reserved state (Total Time divided by Count).
Outdial Connected	**Attempted Count.** The number of times an agent attempted to make an outdial call. **Connected Count.** The number of outdial calls that were connected to an agent. **Hold Count.** The number of times an agent put an outdial call on hold. **Total Talk Time.** The total amount of time an agent was talking with a party on an outdial call. **Total Hold Time.** The total amount of time outdial calls were on hold. **Total Time.** The total amount of time agents were connected to outdial calls. **Average Hold Time.** The average hold time for outdial calls (Total Hold Time divided by Hold Count). **Average Time.** The average outdial connected time (Total Time divided by Connected Count).
Disconnected Count	The number of calls that were connected to an agent, but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.

Column	Description
Inbound Wrap Up	**Count.** The number of times agents went into the Wrap-up state after an inbound call. **Total Time.** The total amount of time agents spent in the Wrap-up state after an inbound call. **Average Time.** The average length of time agents were in the Wrap-up state after an inbound call (Total Wrap Up Time divided by Wrap Up Count).
Outdial Wrap Up	**Count.** The number of times agents went into the Wrap-up state after an outdial call. **Total Time.** The total amount of time agents spent in the Wrap-up state after an outdial call. **Average Time.** The average length of time agents were in the Wrap-up state after an outdial call (Total Outdial Wrap Up Time divided by Outdial Wrap Up Count).
Not Responding	**Count.** The number of times an agent was in the Not Responding state. **Total Time.** The total amount of time agents spent in the Not Responding state. **Average Time.** The average length of time agents were in the Not Responding state (Total Not Responding Time divided by Not Responding Count).
Consult Answer	**Count.** The number of times agents answered a consult request from another agent. **Total Time.** The total amount of time agents spent answering consult requests. **Average Time.** The average length of time agents spent answering consult requests (Total Consult Answer Time divided by Consult Answer Count).
Consult Request	**Count.** The number of times agents sent a consult request to another agent. **Total Time.** The total amount of time agents spent consulting other agents. **Average Time.** The average length of time agents spent consulting other agents (Total Consult Request Time divided by Consult Request Count).
Consult	**Count.** The number of times agents answered consult requests plus the number of times agents consulted other agents. **Total Time.** Total Consult Answer Time plus Total Consult Request Time. **Average Time.** The average length of consulting time (Total Consult Time divided by Consult Count).
Conference	The number of times an agent initiated a conference call.

Column	Description
Inbound CTQ Request	**Count.** The number of times agents initiated a consult to queue while handling an inbound call. **Total Time.** The total amount of time agents spent answering consult-to-queue requests from an agent handling an inbound call.
Inbound CTQ Answer	**Count.** The number of times agents answered a consult-to-queue request from another agent who was handling an inbound call. **Total Time.** The total amount of time agents spent answering consult-to-queue requests from an agent handling an inbound call.
Outdial CTQ Request	**Count.** The number of times agents initiated a consult-to-queue request while handling an outdial call. **Total Time.** The total amount of time agents spent answering consult-to-queue requests from an agent handling an outdial call.
Outdial CTQ Answer	**Count.** The number of times agents answered a consult-to-queue request from another agent who was handling an outdial call. **Total Time.** The total amount of time agents spent answering consult-to-queue requests from an agent handling an outdial call.
Agent Transfer	The number of times an agent transferred an inbound call to another agent.
Agent Requeue	The number of times an agent requeued an inbound call.
Blind Transfer	The number of times an agent transferred an inbound call without consulting first.
Inbound Avg Handle Time	The average length of time spent handling an inbound call (Total Inbound Connected Time plus Total Wrap Up Time, divided by Inbound Connected Count).
Outdial Avg Handle Time	The average length of time spent handling an outdial call (Total Outdial Connected Time plus Total Outdial Wrap Up Time, divided by Outdial Connected Count).

Displaying a Historical Agent Summary Report

To display a historical agent summary report:

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

   The default agent report page appears.
3. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel on the left side of the page.

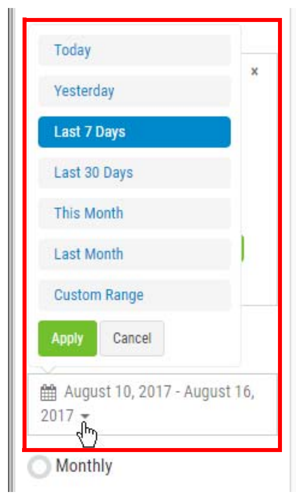
4. To display different statistics, select the settings you want from the lists in the Report Filter panel:

   a. Select a value from the **Display Results By** drop-down list in the Report Filter panel to specify whether you want to display results by sites, teams, or agents. Then select one or more sites, teams, or agents that you want covered in the report, or use the default **All** setting if available.

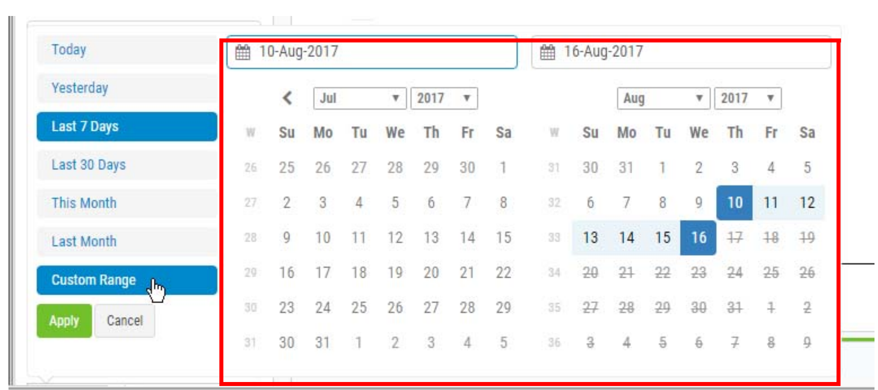
      If you are selecting agents and you want deleted agents to be removed from from the list, select the **Exclude Deleted Agents** check box.

   b. Select a parameter from the **Chart Parameter** drop-down list.

   c. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select the time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days, This Month**, **Last Month**, or **Custom Range**.



      If you selected **Custom Range**, specify a date range of up to 92 days. You can either enter start and end dates in the two fields or use the calendar controls to specify the dates.

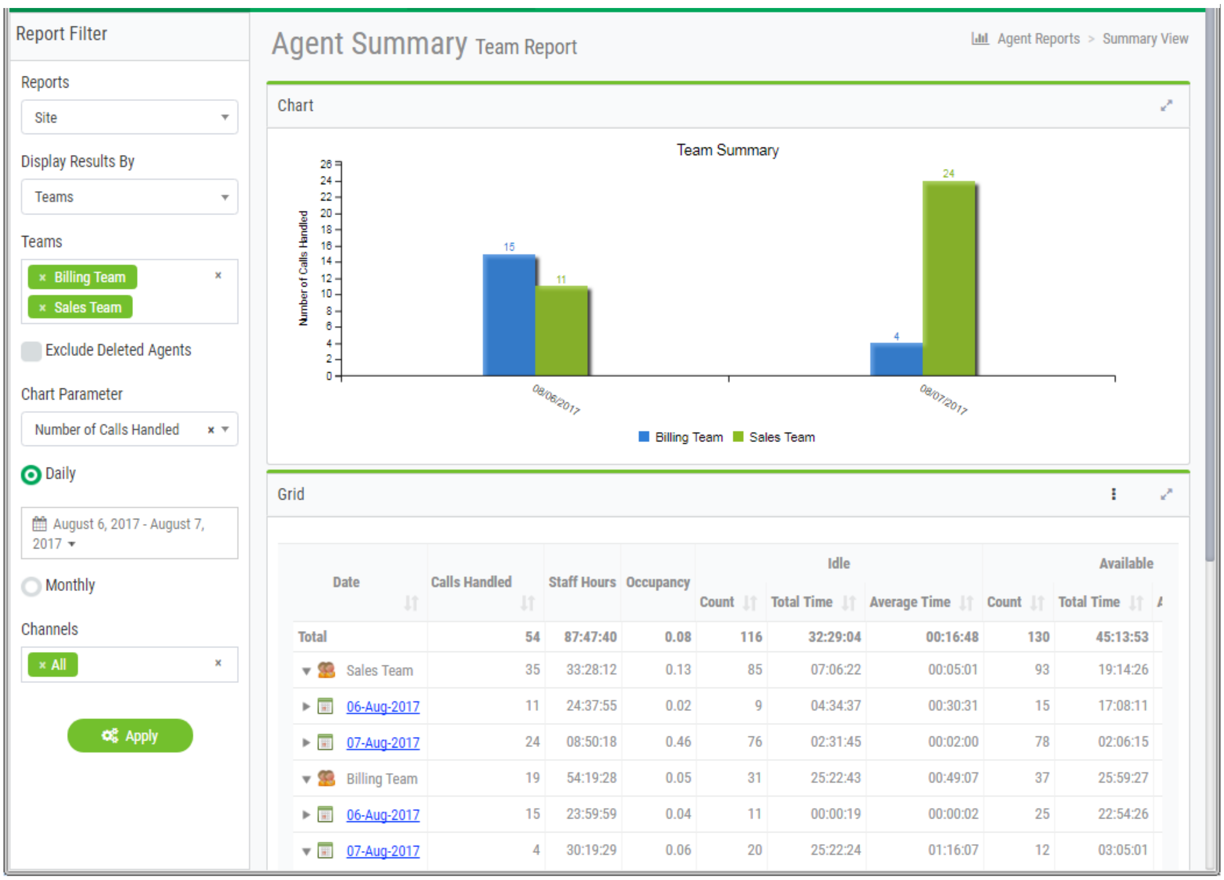


d. To create a monthly report, click the **Monthly** button and select a number between 1 and 13.

e. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.

f. Click **Apply** to view the results.

Following is an example of a team-level agent summary report.



The report chart displays data based on the chart parameter you selected. The report grid displays the summary information described in "Data Available in Historical Agent Summary and Interval Reports" on page 273 for one or more sites, teams, or agents, based on your selection in the *Display Results By* list.

- If you are displaying results for sites or teams, click a date to drill down to a half-hourly view of data for that day (see "Displaying a Historical Agent Interval Report for a Site or Team" on page 280).
- If you are displaying results for agents, you can drill down to display detailed information about the activity of an individual agent (see "Displaying a Historical Interval Report for an Individual Agent" on page 281).

Use the controls at the bottom of the report grid to navigate through a multipage report, collapse or expand the grid rows, or reload the current page (as described in "Using the Controls at the Bottom of a Grid" on page 200).

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

Displaying a Historical Agent Interval Report for a Site or Team

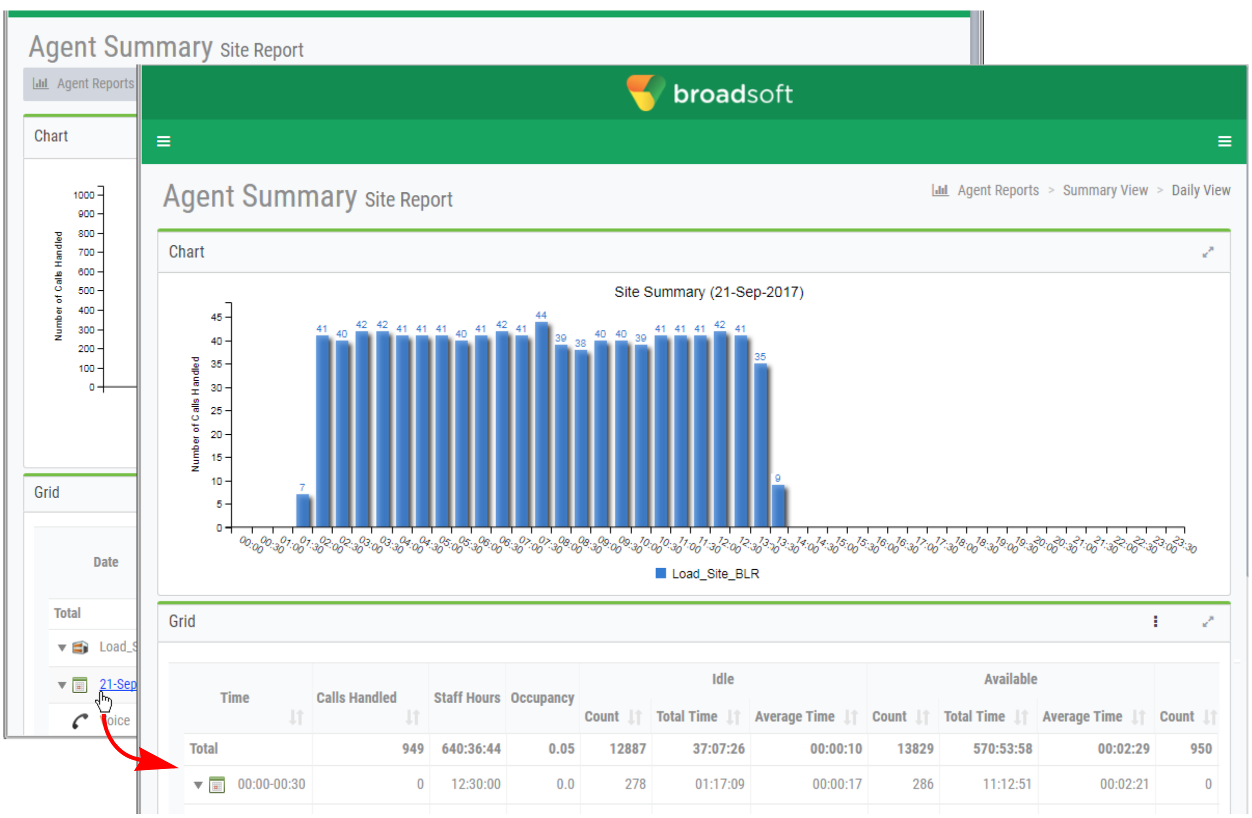
To display a half-hourly historical agent interval report for a site or team:

1. Display an agent summary report as described in "Displaying a Historical Agent Summary Report" on page 277, selecting **Sites** or **Teams** in the **Display Results By** drop-down list.

   The agent summary report appears.

2. In the report grid, click a date to drill down to a half-hourly view of data for that day.

   The site-level or team-level agent interval report appears. The report chart displays data based on the chart parameter you selected. The report grid displays the summary information described in "Data Available in Historical Agent Summary and Interval Reports" on page 273.

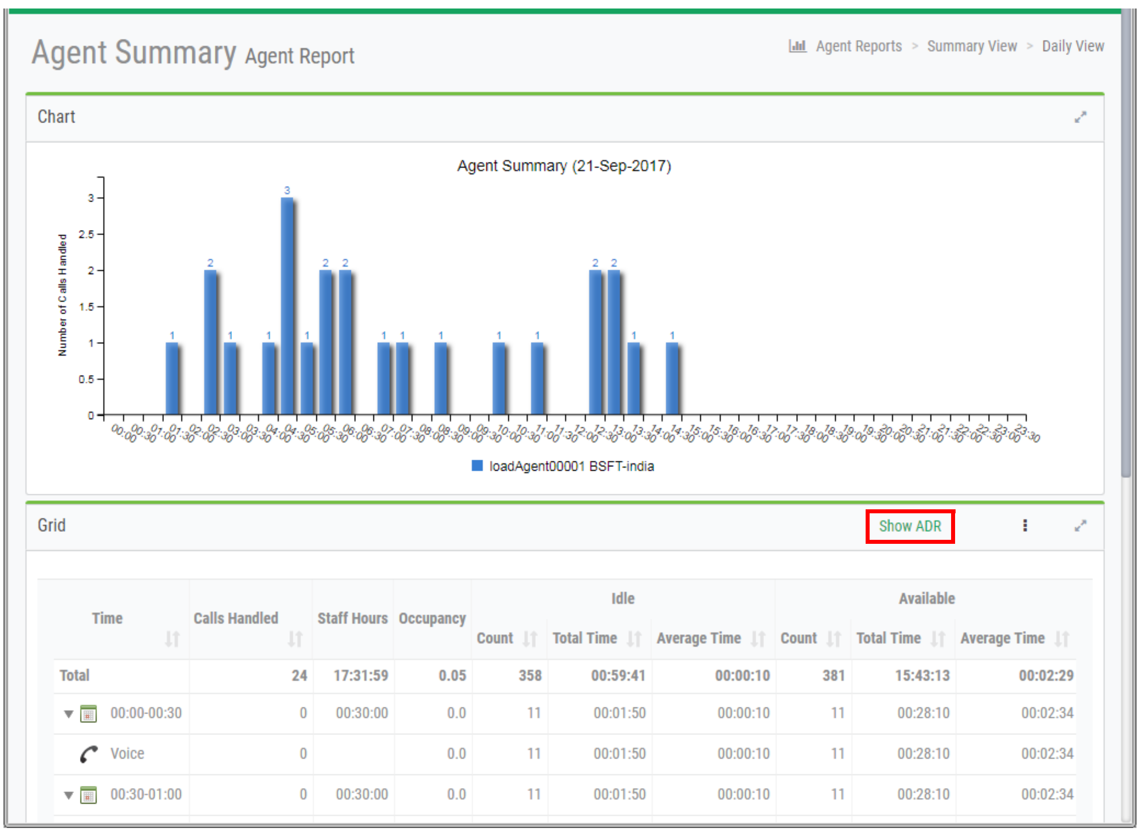


Displaying a Historical Interval Report for an Individual Agent

To display a half-hourly historical agent interval report for an individual agent:

1. Display an agent summary report as described in "Displaying a Historical Agent Summary Report" on page 277, selecting **Agent** in the **Display Results By** drop-down list and specifying the agents you want covered in the report.
2. Click a date in the report grid to display the agent detail report.
3. In the agent detail report, click the **Show Interval** link on the right side of the grid panel header.

   The interval report for the agent appears. The report chart displays data based on the chart parameter you selected. The report grid displays the summary information described in "Data Available in Historical Agent Summary and Interval Reports" on page 273.
4. Click the **Show ADR** link to redisplay the agent detail report.



Displaying a Historical Agent Detail Report

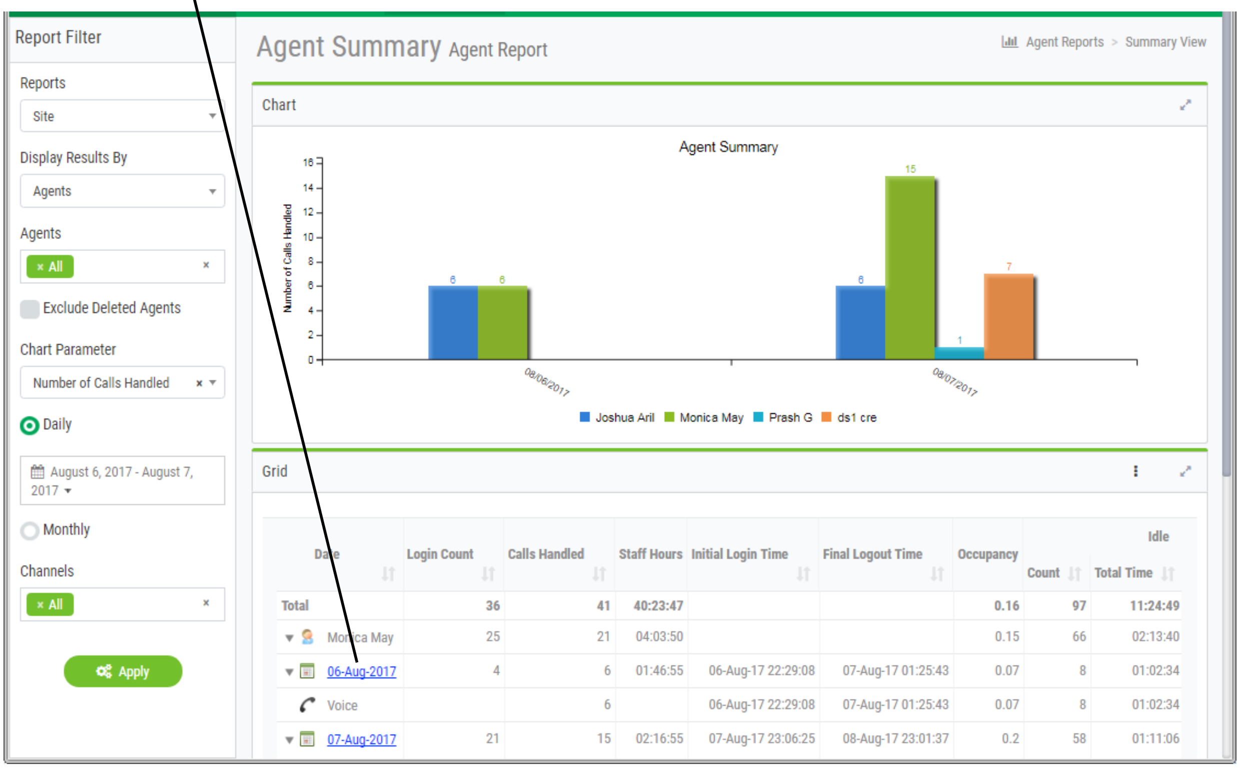
You can drill down from the Agent Summary view to obtain details about the activity of an individual agent on a selected day.

To display a historical agent detail report:

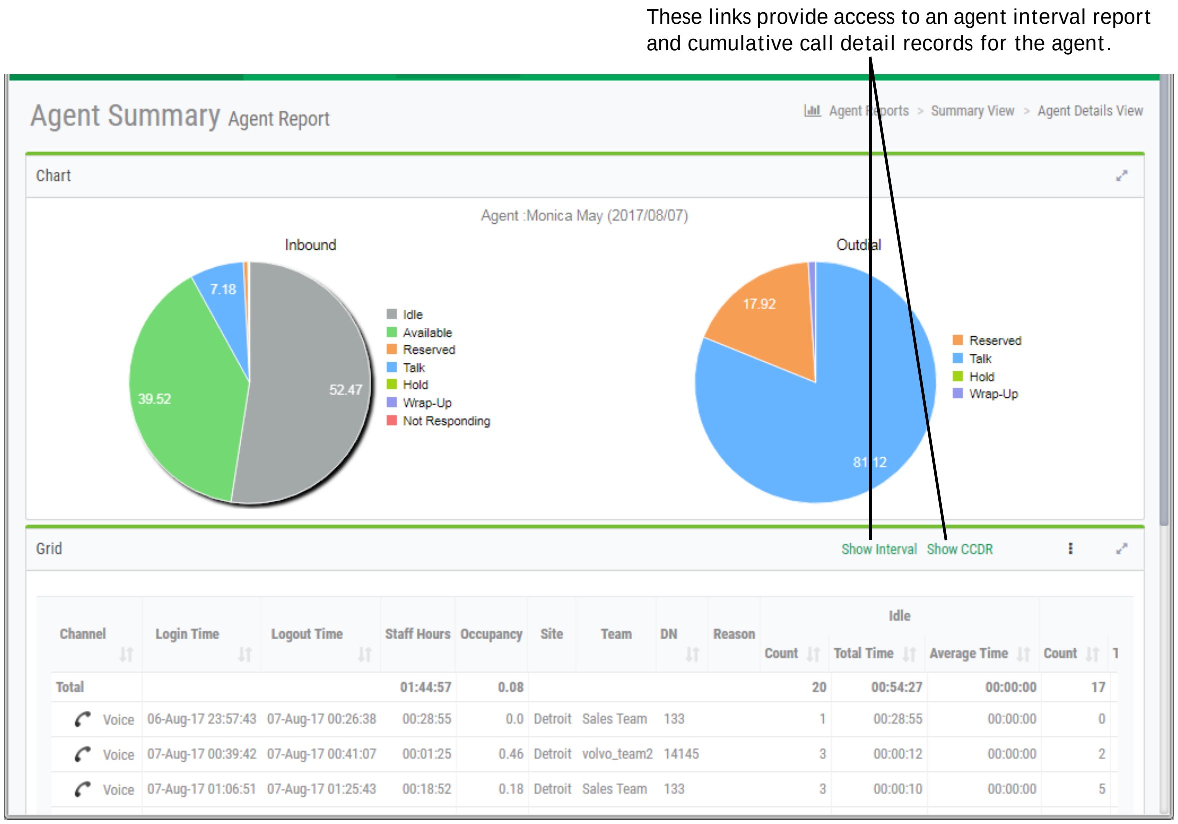
1. Follow the instructions in "Displaying a Historical Agent Summary Report" on page 277, selecting **Agent** in the **Display Results By** drop-down list and specifying the agents you want covered in the report.

   After you click **Apply**, the Agent Summary view appears.

Click a date to display the Agent Details view.



2. In the report grid, click a date. The Agent Details view appears.



The report chart displays two pie charts. The chart on the left shows the percentage of time the agent spent in each agent state. If the agent participated in any outdial calls, the chart on the right shows the percentage of time the agent spent in each state during outdial calls.

The grid panel header displays links to the agent interval report and cumulative call detail records for the agent (for more information, see “Displaying a Historical Interval Report for an Individual Agent” on page 281 and “Displaying Agent Call Detail Records” on page 287).

The report grid displays the date and login name of the agent along with the following information.

Column	Description
Channel	The media channel associated with the activity. Appears only if your enterprise uses the Multimedia feature.
Login Time	The date and time the agent logged in to the Agent Desktop.
Logout Time	The date and time the agent logged out of the Agent Desktop.
Staff Hours	The amount of time the agent was logged in during each login session.

Column	Description
Occupancy	The measure of time agents spent on calls compared to available and idle time (Total Inbound Connected Time + Total Wrap Up Time + Total Outdial Connected Time + Total Outdial Wrap Up Time, divided by Staff Hours)
Site	The site where the team the agent was handling calls for is located.
Team	The team the agent was handling calls for.
DN	The dial number the agent used to log in to the Agent Desktop.
Reason	The reason the agent logged out. For example: • **Desktop browser closed.** The browser window in which the Agent Desktop application was running was closed while the agent was logged in. • **LoggingInAnotherInstance.** The system logged the agent out because the agent logged in to another instance of the Agent Desktop. • **Lost network connection.** The agent was logged out because of a network interruption that exceeded two minutes (unless a different timeout is specified for your system). • **Normal logout.** The agent clicked the **Log Out** button in the Agent Desktop window. • **Operational logout.** The system logged the agent out in response to a command initiated by CJP Operations or Technical Support. • **Supervisory logout.** The supervisor logged the agent out. Other reasons can occasionally occur.
Idle	**Count.** The number of times the agent went into the Idle state. **Total Time.** The total amount of time the agent spent in the Idle state. **% Time.** The percentage of time the agent was in the Idle state.
Available	**Count.** The number of times the agent went into the Available state. **Total Time.** The total amount of time the agent spent in the Available state. **% Time.** The percentage of time the agent was in the Available state.
Inbound Reserved	**Total Time.** The amount of time the agent spent in the Reserved state, during which a call is coming in to the agent's station but has not yet been answered. **% Time.** The percentage of time the agent was in the Inbound Reserved state.

Column	Description
Inbound Connected	**Hold Count.** The number of times the agent put a caller on hold. **Connected Count.** The number of inbound calls that were connected to the agent. **Total Talk Time.** The total amount of time the agent was talking with a caller. **Total Hold Time.** The total amount of time inbound calls were on hold. **Total Time.** The total amount of time the agent was connected to inbound calls. **% Talk Time.** The percentage of inbound connected time the agent was talking with the caller. **% Hold Time.** The percentage of inbound connected time the caller was on hold. **% Time.** The percentage of time the agent was connected to an inbound call.
Outdial Reserved	**Count.** The number of times the agent was in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet. **Total Time.** The total amount of time the agent spent in the Outdial Reserved state.
Outdial Connected	**Attempted Count.** The number of times the agent attempted to make an outdial call. **Connected Count.** The number of outdial calls that were connected to the agent. **Hold Count.** The number of times the agent put an outdial call on hold. **Total Talk Time.** The total amount of time the agent was talking with a party on an outdial call. **Total Hold Time.** The total amount of time outdial calls were on hold. **Total Time.** The total amount of time the agent was connected to an outdial call.
Disconnected Count	The number of calls that were connected to the agent, but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.
Inbound Wrap Up	**Count.** The number of times the agent went into the Wrap-up state after an inbound call. **Total Time.** The total amount of time the agent spent in the Wrap-up state after an inbound call. **% Time.** The percentage of time the agent was in the Wrap-up state after an inbound call.

Column	Description
Outdial Wrap Up	**Count.** The number of times the agent went into the Wrap-up state after an outdial call. **Total Time.** The total amount of time the agent spent in the Wrap-up state after an outdial call.
Not Responding	**Count.** The number of times the agent went into the Not Responding state. **Total Time:** The total amount of time the agent spent in the Not Responding state. **% Time.** The percentage of time the agent was in the Not Responding state.
Consult Answer	**Count.** The number of times the agent answered a consult request from another agent who was handling an inbound call. **Total Time.** The total amount of time the agent spent answering consult requests. **% Time.** The percentage of time the agent spent answering consult requests.
Consult Request	**Count.** The number of times the agent sent a consult request to another agent while on an inbound call. **Total Time.** The total amount of time the agent spent consulting other agents while on an inbound call. **% Time.** The percentage of time the agent spent consulting other agents while on an inbound call.
Consult	**Count.** The number of times the agent answered consult requests plus the number of times the agent consulted other agents. **Total Time.** Total Consult Answer Time plus Total Consult Request Time.
Conference	The number of times the agent initiated a conference call.
Inbound CTQ Request	**Count.** The number of times the agent initiated a consult to queue while handling an inbound call. **Total Time.** The total amount of time between when the agent initiated a consult to queue while handling an inbound call and when the consultation ended.
Inbound CTQ Answer	**Count.** The number of times the agent answered a consult-to-queue request from another agent who was handling an inbound call. **Total Time.** The total amount of time the agent spent answering consult-to-queue requests from an agent handling an inbound call.
Outdial CTQ Request	**Count.** The number of times the agent initiated a consult to queue while handling an outdial call. **Total Time.** The total amount of time between when the agent initiated a consult to queue while handling an outdial call and when the consultation ended.

Column	Description
Outdial CTQ Answer	**Count.** The number of times the agent answered a consult-to-queue request from another agent who was handling an outdial call. **Total Time.** The total amount of time the agent spent answering consult-to-queue requests from an agent handling an outdial call.
Agent Transfer	The number of times the agent transferred an inbound call to another agent.
Agent Requeue	The number of times the agent requeued a call.
Blind Transfer	The number of times the agent transferred a call without consulting first.
Inbound Avg Handle Time	The average length of time the agent spent handling an inbound call (Total Inbound Connected Time plus Total Wrap Up Time, divided by Inbound Connected Count).
Outdial Avg Handle Time	The average length of time the agent spent handling an outdial call (Total Outdial Connected Time plus Total Outdial Wrap Up Time, divided by Outdial Connected Count).

Displaying Agent Call Detail Records

The agent detail report includes a link that provides access to cumulative call detail records (CCDRs) for all calls that reached the agent on the day covered in the agent detail report.

To display call detail records for an agent:

1. Display an agent summary report as described in "Displaying a Historical Agent Summary Report" on page 277, selecting **Agents** in the **Display Results By** drop-down list and specifying the agents you want covered in the report.

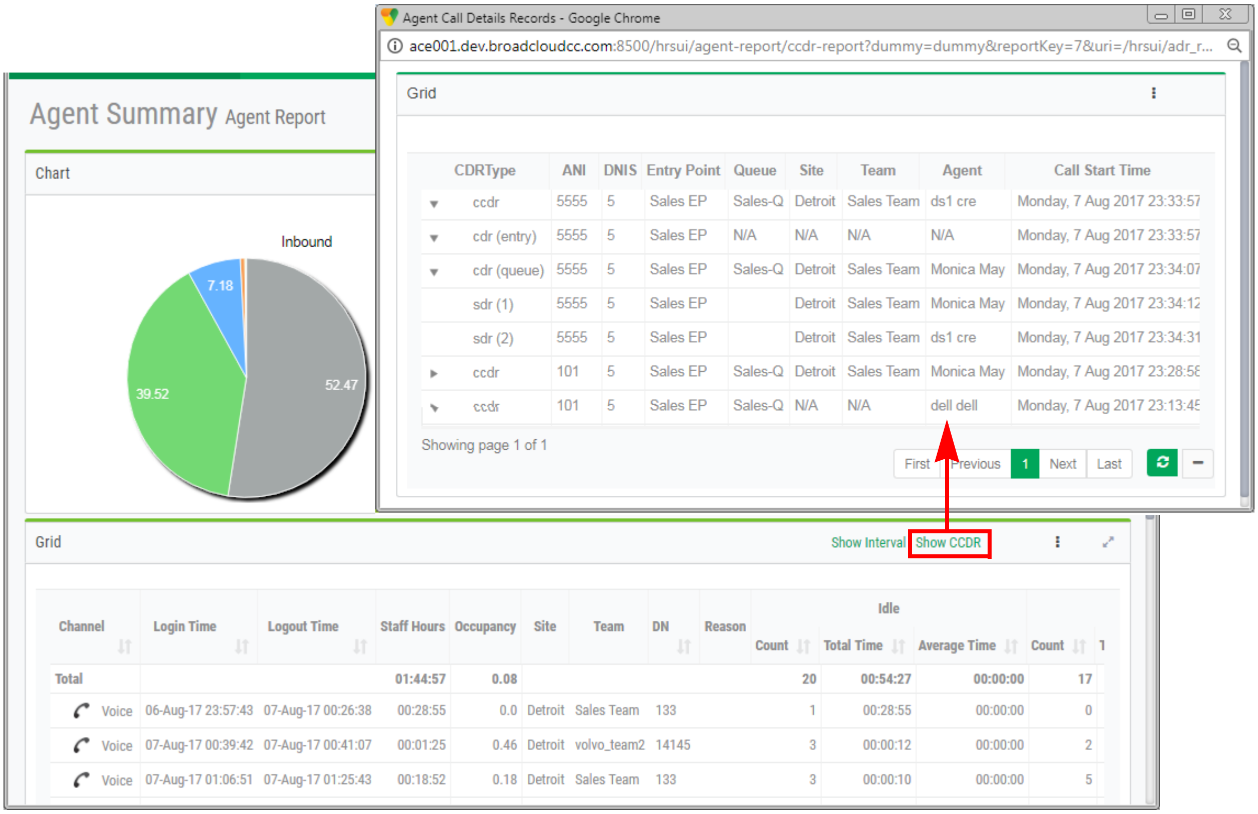
   The agent summary view appears. The report grid displays a summary row for each agent you selected, followed by a row of data for each day during which that agent was logged in.

2. In the report grid, click a date to display the Agent Details view.

3. In the Agent Details view, click the **Show CCDR** link in the grid panel header.

   The Agent Call Detail Records report appears in a pop-up window.

   - For a description of the information available in the report, see the table in "Available Historical Call Report Data" on page 256.
   - For a description of the four CDR types that can appear in the CDRType column, see the table on page 265.



Creating or Modifying a Custom Historical Agent Report

Note: Canned reports cannot be modified.

To create or modify a custom historical agent report:

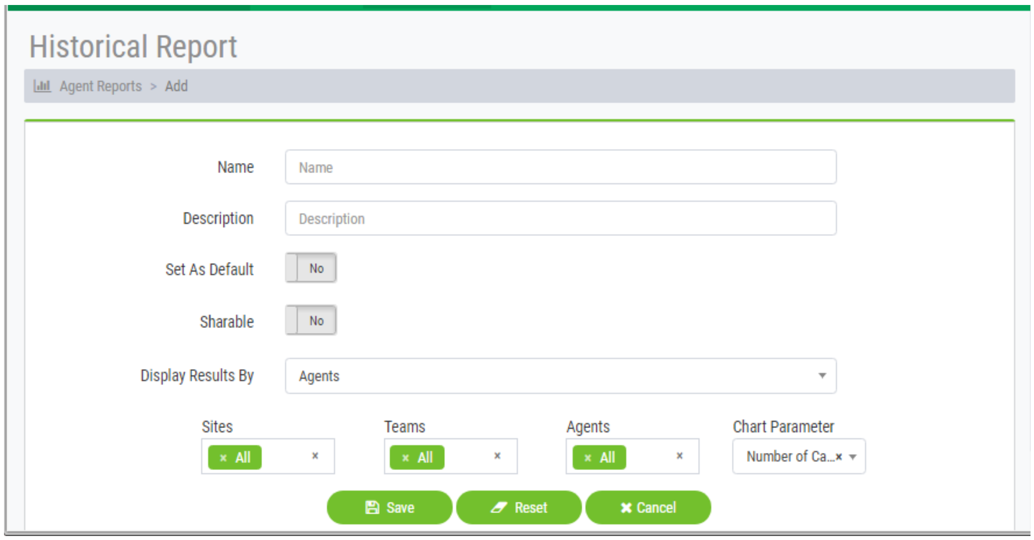
1. Open the **Historical Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the List page that appears, do one of the following:
   - Click the **New Report** button on the upper left side of the page and enter information in the data fields as described in the following steps.

     -OR-

   - Click the ▪▪▪ button to the left of a listed report and select **Copy** or **Edit**.
4. On the page that appears, specify the settings as described in the following table and then click **Save**.

After the report is saved, it will be available from the Reports drop-down list in the Historical Reports module, Agent Reports > View Reports page and will be listed in the Customize Reports page with your login name displayed in the *Created By* column.

Note: After saving a default custom report, wait 10 to 15 seconds before logging out. Otherwise, your parameter settings might not be saved.



Setting	Description
Name	Enter or modify the name for the report.
Description	Optionally, enter a short description of the report.
Set as Default	Select **Yes** if you want this report to be displayed the next time you access the Agent Reports > View Reports page in the Historical Reports module.
Sharable	Select **Yes** if you want everyone who has access to the CJP Historical Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by site, team, or agent. Then select one or more sites, teams, or agents that you want covered in the report, or use the default **All** setting if available. When you select **Agents** in the **Display Results By** list, the page displays lists of available sites, teams, and agents.
Chart Parameter	Select the chart parameter that you want displayed in the report chart.

Deleting a Historical Agent Report

Note: Canned reports cannot be deleted.

To delete a historical agent report:

1. Open the **Historical Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, click the ▪▪▪ button to the left of the listed report that is not canned and select **Delete**.

Specifying a Different Default Historical Agent Report

When navigate to the Agent Reports > View Reports page in the Historical Reports module, the default report appears. To specify a different default report:

1. Open the **Historical Reports** module.
2. Click the **Agent Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, click the ▪▪▪ button to the left of a listed report that is not canned and select **Set as Default**.

Agent Trace Report

An agent trace report provides a view of all the activities that the agents in the report have been involved in over the course of a specified time period, including the time each agent logged in and logged out, and the time the agent entered and left the following states during each login session: Idle, Available, Talking, On Hold, Not Responding, Wrap Up, Consult-Answer, Consult-Request, and Conference.

To view an agent trace report:

1. Open the **Historical Reports** module and click the **Agent Trace Report** button on the menu bar.

   The default agent trace report is displayed.

2. To display different statistics, select the settings you want from the lists in the Report Filter panel on the left side of the page.

   a. Select one or more agents that you want covered in the report.

   b. If you want to exclude deleted agents from the report, select the **Exclude Deleted Agents** check box.

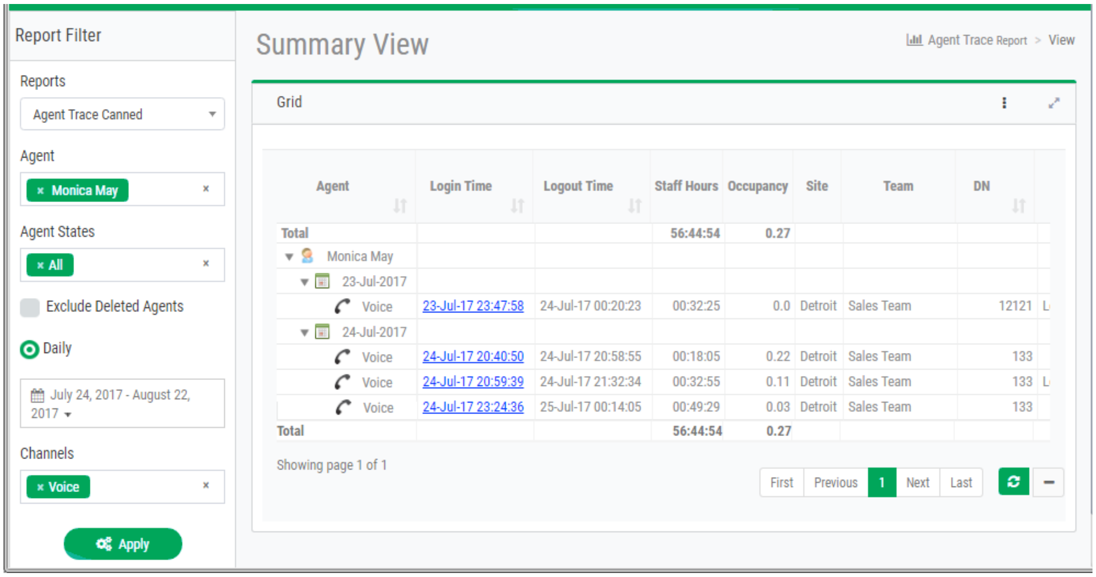
   c. Click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range.**

      If you selected **Custom Range**, specify a date range of up to 31 days: enter start and end dates in the fields that appear or use the calendar controls to specify the dates.

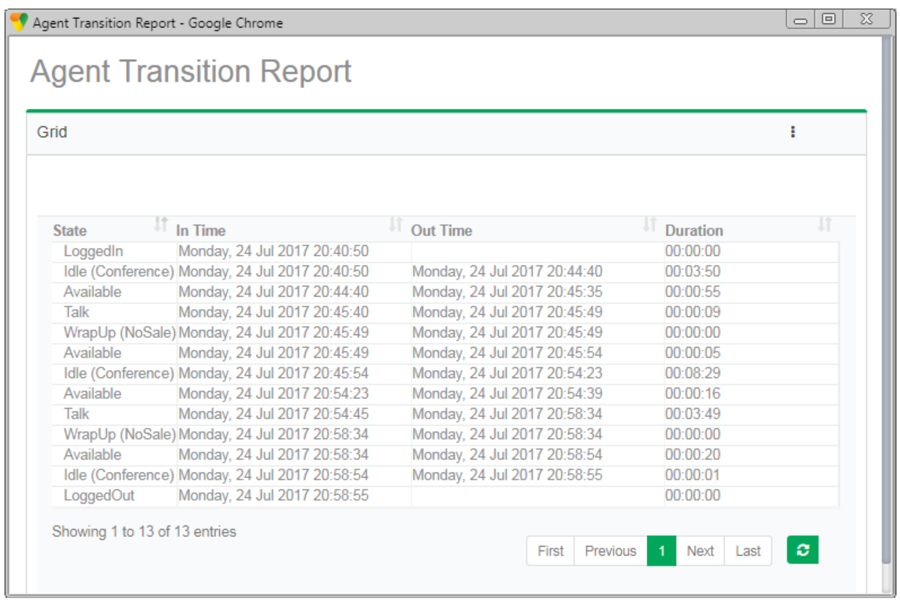
   d. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.

3. Click **Apply**.

   For each selected agent, the report displays the same details that are displayed in the agent detail report (see the table of column descriptions beginning on page 283).



4. Click a date in the **Login Time** column to drill down to details about each state the agent was in during that login session.



Column	Description
State	The time the agent logged in and logged out and each state the agent was in during the login session: • **Available.** The agent was available and waiting for calls. • **Conference.** The agent conferenced a call with another party. • **Consult-Answer.** The agent answered a consult request from another agent. • **Consult-Request.** The agent initiated a consultation with another agent. • **Idle.** The agent was logged in but not available for a specified reason (for example, lunch break, meeting). • **Not Responding.** The agent's phone rang but the agent did not answer within a specified period of time. • **Hold.** The agent placed a connected call on hold. • **Talk**. The agent was talking on an inbound call. • **Wrap Up.** The call ended but the agent was not ready for the next call**.**
In Time	The time the agent entered the state.
Out Time	The time the agent left the state.
Duration	The amount of time the agent was in the state.

Auxiliary Reports

Topics covered in this section:

- Displaying Auxiliary Reports
- Creating or Modifying a Custom Auxiliary Report

Displaying Auxiliary Reports

Auxiliary reports display call counts by agent, site, and team for wrap-up codes and idle codes used on the CJP Agent Desktop. In addition, these reports show how long agents were in the state represented by each code.

You can specify the time period, one or more work types (values associated with idle and wrap-up codes for reporting purposes), and codes you want the report to cover, and can export the report data to either Microsoft Excel or .csv format. In addition, you can create and modify custom auxiliary reports as described in the next section, "Creating or Modifying a Custom Auxiliary Report" on page 295.

To view an auxiliary report:

1. Open the **Historical Reports** module.
2. Click the **Auxiliary Reports** button on the menu bar and select either **View Wrap-up Reports** or **View Idle Reports** from the drop-down list.

   The default report for wrap-up or idle codes appears.
3. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel.
4. To display different statistics, select the settings you want from the lists in the Report Filter panel:

   a. Select a value from the **Display Results By** list to specify whether you want to display results by sites, teams, or agents. Then select one or more sites, teams, or agents that you want covered in the report, or use the default **All** setting if available.

      If you are selecting agents and you want deleted agents to be removed from from the list, select the **Exclude Deleted Agents** check box.

   b. From the **Work Types** list, select work types that you want the report to include or use the default **All** setting.

   c. From the **Wrap Up Codes** or **Idle Codes** list, select the idle or wrap-up codes that you want the report to include or use the default **All** setting.

   d. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days, This Month**, **Last Month**, or **Custom Range**.

      If you selected **Custom Range**, specify a date range of up to 92 days: enter start and end dates in the fields that appear or use the calendar controls to specify the dates.

   e. To create a monthly report, click the **Monthly** button and select a number between 1 and 13. Monthly reports provide monthly totals for each selected site, team, or agent without providing a row of data for each day of the month

   f. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.
5. Click **Apply** to view the results.

Creating or Modifying a Custom Auxiliary Report

Note: You cannot modify a canned report.

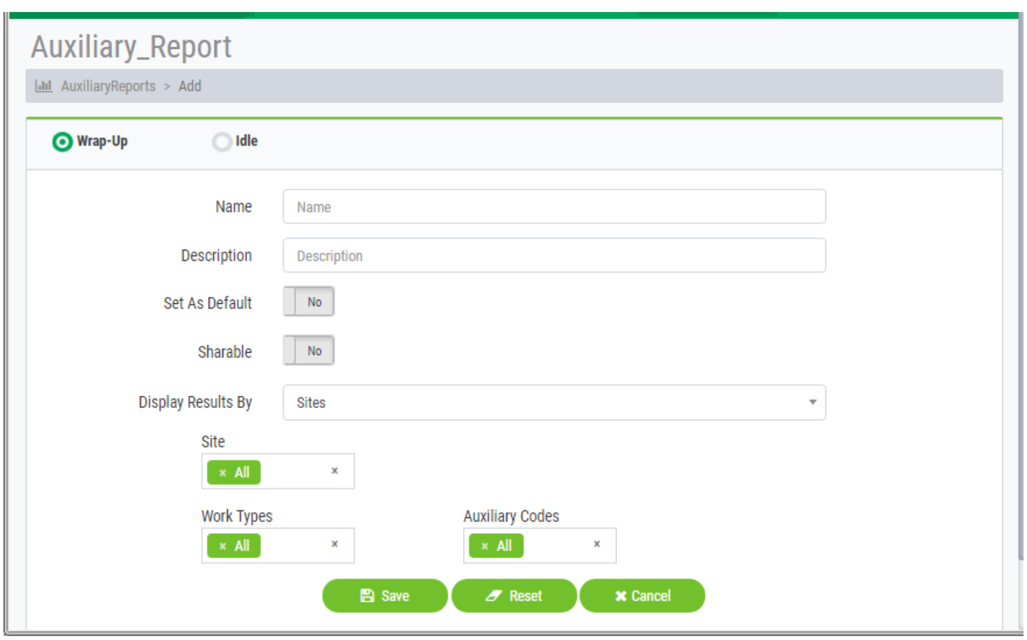
To create or modify a custom auxiliary report:

1. Open the **Historical Reports** module.
2. Click the **Auxiliary Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, select the **Wrap Up** or **Idle** button on the upper-left side of the page to specify the kind of report you want to create or modify, and then do one of the following:
   - Click the **New Report** button.

     -OR-
   - To copy or modify an existing report, click the ▪▪▪ button to the left of a listed report and select **Copy** or **Edit**.
4. On the page that appears, specify the settings as described in the following table and then click **Save.**

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

   Note: After saving a default custom report, wait 10 to 15 seconds before logging out. Otherwise, your parameter settings might not be saved.



Setting	Description
Name	Enter or modify the name for the report.
Description	Optionally, enter a short description of the report.
Set as Default	Select **Yes** if you want this report to be displayed the next time you access the relevant Auxiliary Reports page (View Wrap-Up Reports or View Idle Reports). **Note:** You must log out and log in again for the new default to take effect.
Sharable	Select **Yes** if you want everyone who has access to the CJP Historical Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by site, team, or agent. Then select one or more sites, teams, or agents that you want covered in the report, or use the default **All** setting if available. When you select **Agents** in the **Display Results By** list, the page displays lists of available sites, teams, and agents. When you select one or more sites, the Teams list displays the names of the teams that serve those sites. When you select one or more teams, the Agents list displays the agents that belong to those teams.
Work Types	Select one or more work types from the drop-down list or select **All**. The Auxiliary Codes list displays the codes associated with the selected work types.
Auxiliary Codes	Select one or more auxiliary codes that you want the report to include or select **All**.

Historical Skill Reports

Topics covered in this section:

- Displaying Historical Skill Reports
- Data Available in a Skills by Queues Report
- Data Available in a Skills by Agents Report
- Creating or Modifying a Custom Historical Skill Report
- Deleting a Historical Skill Report
- Specifying a Different Default Historical Skill Report

Displaying Historical Skill Reports

Historical skill reports provide summary views of monthly or daily call or agent activity for a specified time period based on skill requirements for the calls.

- The **Skills by Queues** report displays call data based on the skill requirements that were assigned to the calls within each queue covered in the report. You can drill down from a monthly summary to a daily summary and from a daily summary to half-hourly data for a specific day. In addition, you can drill down on a skill for skill escalation details.
- The **Skills by Agents** report displays metrics for each skill that was matched in connecting calls to agents.

To display a historical skill report:

1. Open the **Historical Reports** module.
2. Click the **Skill Reports** button on the menu bar and select **View Reports** from the drop-down list.

   The default skill report page appears.
3. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel.
4. To display different statistics, select the settings you want from the lists in the Report Filter panel:

   a. Select one or more queues or agents that you want covered in the report, or use the default **All** setting.

      If you are selecting agents and you want deleted agents to be removed from from the list, select the **Exclude Deleted Agents** check box.

   b. Select one or more skills or use the default **All** setting.

   c. Select a parameter from the **Chart Parameter** drop-down list.

   d. To create a daily report, select the **Daily** button if it is not already selected, then click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days, This Month**, **Last Month**, or **Custom Range**.

      If you selected **Custom Range**, specify a date range of up to 92 days: enter start and end dates in the fields that appear or use the calendar controls to specify the dates.

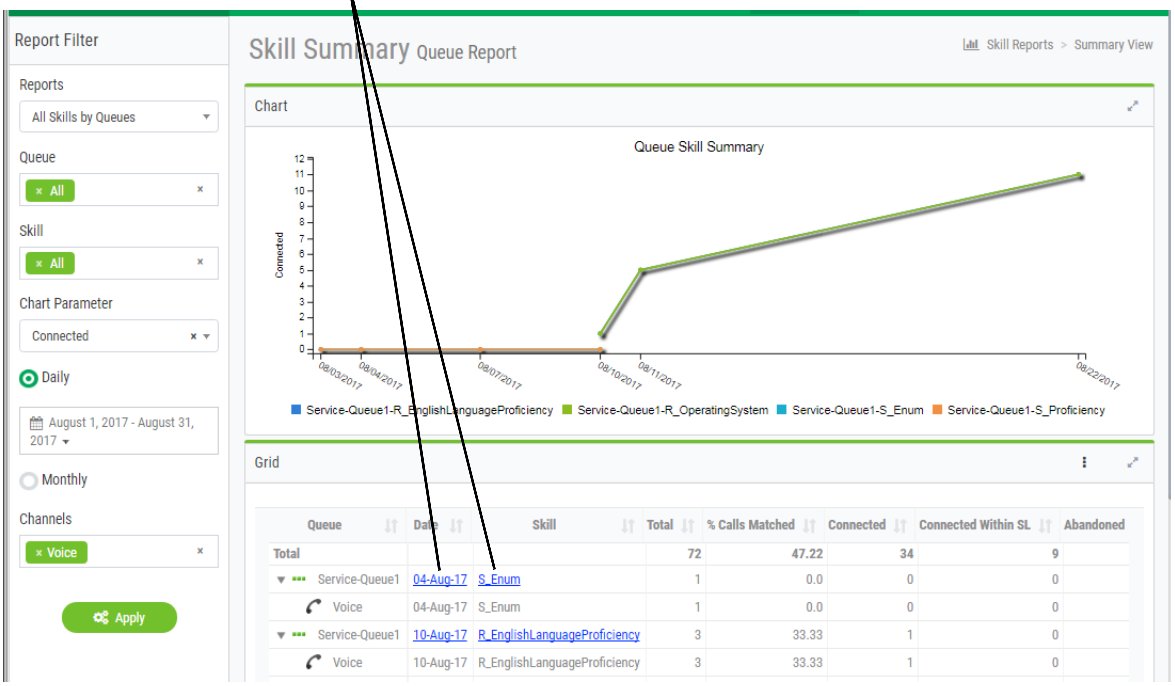
   e. To create a monthly report, click the **Monthly** button and select a number between 1 and 13.

f. If your enterprise uses the optional Multimedia feature, select one or more media channels from the **Channels** list that you want covered in the report, or select the **All** setting.

g. Click **Apply** to view the results.

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

Click an entry in the **Date** or **Skill** column to drill down to a half-hourly view for that queue or skill.



The report chart displays data based on the chart parameter you selected. The report grid displays information for one or more skills and one or more queues or agents, based on your selections.

- If you selected Last Month(s) as the report duration, you can click an entry in the **Month** column to drill down to a summary of data for each day in that month when call activity occurred.
- In a daily summary view, you can click an entry in the **Date** column to drill down to a daily view that displays values in half-hour intervals for that day.
- In a skills by queues report, you can also click an entry in the **Skill** column to drill down to a daily summary view (from a monthly summary view) or half-hourly view of data for that day (from a daily summary view).
- If your enterprise uses the optional Multimedia feature and more than one media channel appears in the report, you can click the collapse arrow (▼) or expand arrow (▶) next to the name of a queue (in a Skills by Queue report) or agent (in a Skills by Agent report) to collapse or expand the rows displaying channel details.

The parameters in the report grid are described in the following topics:

- Data Available in a Skills by Queues Report
- Data Available in a Skills by Agents Report

Data Available in a Skills by Queues Report

The following parameters are available in historical skills by queues reports. Asterisks (*) mark parameters that are available only in a skill summary report, which you can display by drilling down on a skill name.

Column	Description
Queue	The name of a queue. If your enterprise uses the Multimedia feature and more than one media channel appears in the report, you can click the collapse arrow (▼) or expand arrow (▶) to the left of a queue name to collapse or expand the data grouped by channel type.
Month	The month during which the call activity occurred for that queue and skill. This column appears only if you specified *Last Month(s)* as the report duration. Click an entry in this column to drill down to a daily summary view of the data for that month.
Date	The date the call activity occurred for that queue and skill. Click an entry in this column to drill down to a half-hourly view of data for that day.
Time	The half-hour time interval during which the call activity occurred for that queue and skill.
Skill	The name of a skill. Click an entry in this column to drill down to view daily activity for the month (from a monthly summary) or to view half-hourly data for a day (from a daily summary).
Initial Operand*	The skill operand type that was assigned to the call when it was distributed to the queue. Possible values: • **eq** (equal to) • **neq** (not equal to) • **gte** (greater than or equal to) • **lte** (less than or equal to)
Final Operand*	The skill operand type that was assigned to the call when it was distributed to an agent with a matching skill.
Initial Value*	The value of the skill requirement assigned to the call when it arrived in the queue.
Final Value*	The value of the skill requirement assigned to the call when the call was distributed to an agent.
Total	The total number of calls.

Column	Description
% Calls Matched	The percentage of calls for which the initial value of the skill required by the call was equal to the final value when the call was distributed to an agent. (Matched Calls * 100)/ (Connected + Abandoned + Reclassified)
Connected	The number of calls with this skill requirement that were connected during the report interval.
Connected within SL	The number of calls with this skill requirement that were connected within the Service Level threshold provisioned for this skill.
Abandoned	The number of calls with this skill requirement that were abandoned during the report interval.
Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for this skill.
Reclassified	The number of calls with this skill requirement that were transferred from the queue by the system.
Reclassified within SL	The number of calls with this skill requirement that were transferred from the queue by the system within the Service Level threshold provisioned for the skill.
Avg Handle Time	The average length of time spent handling a call with this skill requirement (total connected time plus total wrap-up time, divided by calls handled).

Data Available in a Skills by Agents Report

The following parameters are available in historical skills by agents reports.

Column	Description
Agent	The name of an agent. If your enterprise uses the Multimedia feature and more than one media channel appears in the report, you can click the collapse arrow (▼) or expand arrow (▶) to the left of an agent name to collapse or expand the channel details.
Month	The month during which the call activity occurred for that agent and skill. This column appears only if you specified *Last Month(s)* as the report duration. Click an entry in this column to drill down to a daily summary view of the data for that month.
Date	The date the call activity occurred for that agent and skill. Click an entry in this column to drill down to a half-hourly view of data for that day.
Skill	The name of a skill.

Column	Description
Operand	The skill operand type that was assigned to the call when it was distributed to the agent. Possible values: • **eq** (equal to) • **neq** (not equal to) • **gte** (greater than or equal to) • **lte** (less than or equal to)
Value	The value of the skill requirement assigned to the call when the call was distributed to the agent.
Connected	The number of calls with this skill requirement that were connected during the report interval.
Connected within SL	The number of calls with this skill requirement that were connected within the Service Level threshold provisioned for this skill.
Avg Handle Time	The average length of time spent handling calls with this skill requirement (total connected time plus total wrap-up time, divided by calls handled).

Creating or Modifying a Custom Historical Skill Report

Note: You cannot modify a canned report.

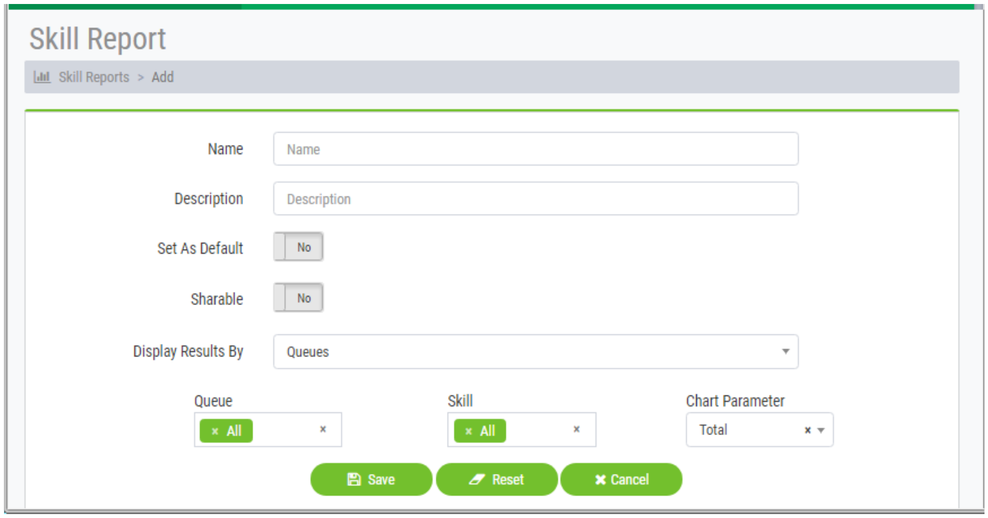
To create or modify a custom skill report:

1. Open the **Historical Reports**.
2. Click the **Skill Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. Do one of the following:
   - Click the **New Report** button.

     -OR-
   - To copy or modify an existing report, click the ■■■ button to the left of a listed report and select **Copy** or **Edit**.
4. On the page that appears, specify the settings as described in the following table and then click **Save**.

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

Note: After saving a default custom report, wait 10 to 15 seconds before logging out. Otherwise, your parameter settings might not be saved.



Setting	Description
Name	Enter or modify a name for the report.
Description	Optionally, enter a short description of the report.
Set as Default	Select **Yes** if you want this report to be displayed the next time you access the Skill Reports > View Reports page in the Historical Reports module. **Note:** You must log out and log in again for the new default to take effect.
Sharable	Select **Yes** if you want everyone who has access to the CJP Historical Reports module to be able to see the report.
Display Results By	Select a value from the drop-down list to specify whether you want the results to be displayed by or agent, and then select one or more queues or agents you want included in the report.
Skill	Select the skills you want included in the report or select **All**.
Chart Parameter	Select the parameter that you want displayed in the report chart.

Deleting a Historical Skill Report

To delete a historical skill report:

1. Open the **Historical Reports**.
2. Click the **Skill Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, click the ▪▪▪ button to the left of the listed report you want to delete and select **Delete**.

Specifying a Different Default Historical Skill Report

When navigate to the Skill Reports > View Reports page in the Historical Reports module, the default report appears. To specify a different default report:

1. Open the **Historical Reports** module.
2. Click the **Skill Reports** button on the menu bar and select **Customize Reports** from the drop-down list.
3. On the page that appears, click the ▪▪▪ button to the left of a listed report that is not canned and select **Set as Default**.

Historical Threshold Alerts

If your enterprise uses the Threshold Alerts feature and your user profile authorizes you to view alerts, you can use the controls on the Threshold Alerts page of the Historical Reports module to display details about threshold alerts that were triggered between midnight of the current day and three months ago. (To view alerts that have been triggered since midnight, see "Monitoring Threshold Alerts" on page 249.)

To display a historical threshold alert report:

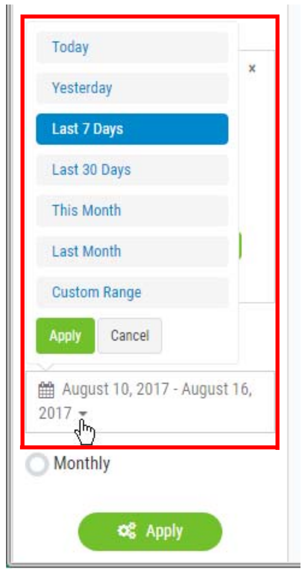
1. Open the **Historical Reports** module and click the **Threshold Alerts** button.

   The default threshold alerts page appears.

2. To display a different report, make a selection from the **Reports** drop-down list in the Report Filter panel on the left side of the page.
3. To display different statistics, select the settings you want from the Report Filter panel:

   a. Select a value from the **Display Results By** drop-down list to specify whether you want to display results by entry point, queue, site, team, or (if your enterprise uses the Agent Thresholds feature) agent. Then select one or more entry points, queues, sites, teams, or agents that you want covered in the report.

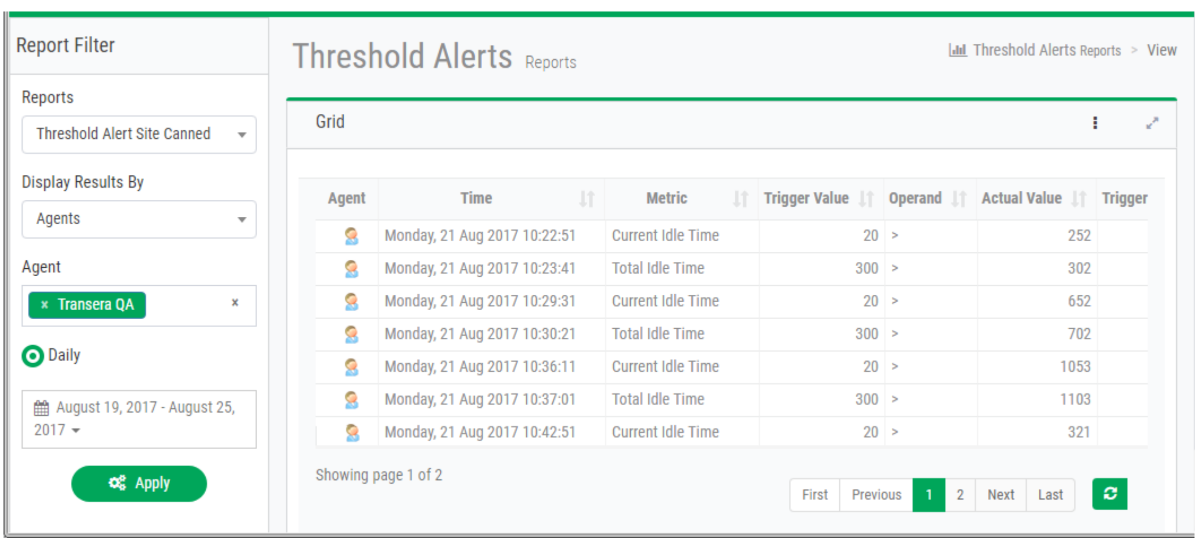
b. To specify the time period that you want the report to cover, click inside the date range field and select a time period for the report from the drop-down list: **Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**, **This Month**, **Last Month**, or **Custom Range**.



When you select **Custom Range**, additional controls appear for you to specify a date range of up to 92 days. Use the calendar controls to select start and end dates or type dates into the two fields.

c. Click **Apply** to view the results.

The report displays the following information for each archived threshold alert associated with each entry point, queue, site, or team in the report.



Column	Description
Time	The date and time that the threshold alert was triggered
Metric	The metric that the threshold is associated with.
Trigger Value	The value that the threshold rule defined as the trigger.
Operand	> (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to)
Actual Value	The actual value that triggered the alert.
Trigger Interval	The number of seconds specified in the threshold rule as the interval during which the system should generate only one alert for the threshold rule check.
Acknowledged	Whether or not a supervisor acknowledged the alert.
Acknowledged Time	The time the alert was acknowledged.
Comments	Optional comments, if any, entered by the supervisor who acknowledged the alert.
Supervisor	The name of the supervisor who acknowledged the alert.
Archived	Whether or not a supervisor archived the alert.

7 Call Monitoring

The Call Monitoring module enables authorized users to silently monitor any active call that is managed by the CJP service at any time, across any site, and verify that customers are being served in a professional manner. Authorized users can also create monitoring schedules, coach an agent who is connected to a call by providing comments that only the agent can hear, and barge in on calls as needed.

This chapter explains how to participate in silent monitoring and coaching sessions for selected voice calls.

Topics covered in this chapter:

- Monitoring Overview
- Monitoring Calls
- Coaching an Agent
- Barging in on a Call
- Viewing Call Monitoring Information
- Working with Monitoring Schedules

Monitoring Overview

The CJP Call Monitoring module enables contact center managers to monitor the quality of service being delivered across their multi-source contact centers. Through a simplified Web interface, authorized users can select a combination of one or more queues, sites, and teams, as well as a specific agent they want to monitor. After these criteria have been entered, the system places a request to monitor the next call that matches the combination of all the criteria when the call is distributed to the destination site. Monitoring can be done on a continuous, one time only (ad hoc), or scheduled basis, and authorized users can monitor a call that is already in progress.

The audio for the call is delivered through an inbound phone call using a phone number associated with the user engaged in monitoring. Authorized supervisors can coach an agent during a connected call by providing comments that only the agent can hear and can barge in on a call and become part of the conversation between the agent and the customer.

Note the following:

- You cannot make a continuous monitoring request and an ad-hoc request for the same target at the same time.
- If a *scheduled request* and a *continuous request* are made for the same target, the continuous request takes precedence. When the continuous request is paused or cancelled, the scheduled request is enabled.
- If a *scheduled request* and an *ad-hoc request* are made for the same target, the ad-hoc request takes precedence. When the ad-hoc request is either cancelled or completed, the scheduled request is enabled.
- If you sign out of the CJP Management Portal while a monitoring request is still active, a message asks if you want to cancel the monitor request or continue monitoring.

  If you select **Yes**, any active mid-call, ad-hoc, or continuous monitoring requests will be cancelled after you log out and any scheduled requests will be suspended.

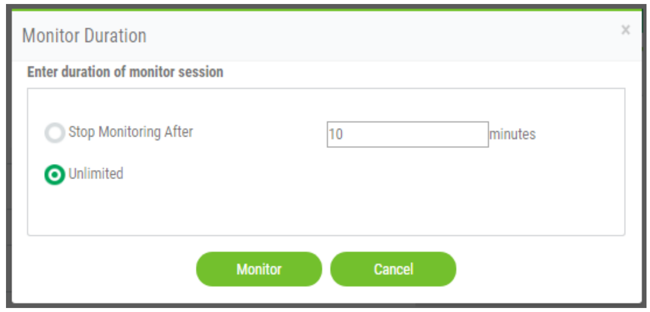
Monitoring Calls

The Call Monitoring page provides an interface for monitoring a call on a continuous or one-time only basis, and down to the agent level.

To monitor a call:

1. Open the **Call Monitoring** module.
2. In the Monitoring Filter panel on the left side of the page, specify one or more queues, sites, teams, and agents you want to monitor. If you leave a Queue, Site, Team, or Agent list set to **All**, only those entities to which you have access will be included in the request.
3. In the **Callback Number** field, enter the phone number where you want the audio to be sent. Enter all the digits required to reach that phone, without hyphens or other special characters. For example, if the phone number is 415-555-1234, you would enter 4155551234.
4. Select the format for the callback number:
    - **U.S. Format** (the default) interprets the phone number as 1 + area code + seven-digit phone number.
    - **Other** indicates that the phone number format is other than U.S. format.
5. If you want to prevent this monitoring session from being displayed on other users' Management Portals, select the **Use Invisible Mode** check box.
6. Click one of the buttons described in the following table to submit your monitor request.

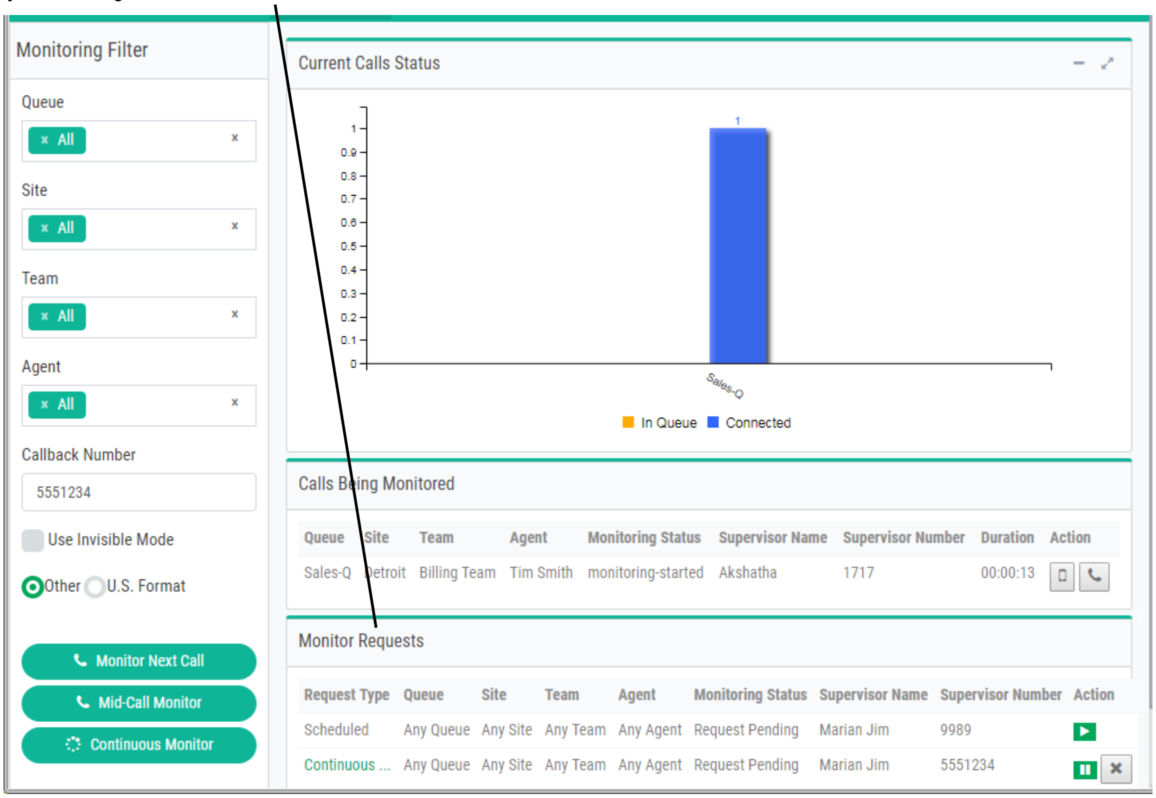
Select this button	To do this
Monitor Next Call	Monitor the next incoming call that fits the specified criteria.
Mid-Call Monitor	Monitor a call that is already in progress and connected to an agent. This button is available only if mid-call monitoring is authorized by your user profile. If no call is in progress, the request fails.

<table>
<tr><th>Select this button</th><th>To do this</th></tr>
<tr><td>Continuous Monitor</td><td>Continuously monitor calls that fit the specified criteria. After you click this button, a dialog box appears where you can enter the duration of the monitoring session in minutes or leave the default set to Unlimited. Then, click Monitor to dismiss the dialog box and submit your request.


Note: After the monitor duration has expired, the system may take up to 5 minutes to remove the monitor request, during which time one additional call might be delivered to you.</td></tr>
</table>

Your request appears in the Monitor Requests list along with any pending requests from your colleagues.

Pending requests from you and your colleagues are listed here.



When a call that matches the criteria you specified is distributed to the destination site, the audio is delivered through a phone call to the number you specified. The monitored call appears in the Calls Being Monitored list.

Calls Being Monitored

Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Duration	Action
Sales-Q	Detroit	Billing Team	Tim Smith	monitoring-started	Akshatha	1717	00:00:13	

For more information about the elements displayed on the Call Monitoring page, see "Viewing Call Monitoring Information" on page 313.

7. If authorized by your user profile, you can click the **Coach** or **Barge In** button in the Action column to coach the agent or barge in on the monitored call. For details, see "Coaching an Agent" on page 312 and "Barging in on a Call" on page 313.

8. When the call has ended, click **Monitor Next Call** to monitor the next call in the queue, or, if you selected **Continuous**, the next call in the queue is automatically sent to you.

9. Click the **Cancel** button to cancel monitoring activity for that request. If you selected Continuous, you can click the **Pause** button to temporarily halt the calls sent to your number. Then you can click the **Resume** button to resume monitoring.

Calls Being Monitored

Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Duration	Action
Sales-Q	Detroit	Billing Team	Tim Smith	monitoring-started	Akshatha	1717	00:00:13	

Monitor Requests

Request Type	Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Action
Scheduled	Any Queue	Any Site	Any Team	Any Agent	Request Pending	Marian Jim	9989	
Continuous ...	Any Queue	Any Site	Any Team	Any Agent	Request Pending	Marian Jim	5551234	

Note: If an agent goes into the Not Responding state, the call goes back to queue and the caller hears music on hold. If during this time, a supervisor is monitoring the call, the supervisor is disconnected as well. If the supervisor is scheduled to monitor the call but has not yet picked up, the call disappears from the Monitor Requests list and the phone stops ringing.

Coaching an Agent

If the Whisper Coach feature is enabled in your user profile, you can speak to an agent who is being monitored without being heard by the customer.

- The coaching session continues, even if the call is transferred to another agent, until the call either ends or is transferred to another number (agent-to-DN transfer).
- If the coached agent consults with another agent, you will hear music on hold and will not be able to continue coaching the agent until the caller is taken off hold.

While coaching an agent, you can barge in on the call if the Barge In feature is enabled in your user profile.

To silently coach an agent:

1. While you are monitoring a call (as described in “Monitoring Calls” on page 309) and the call is connected to an agent, click the **Coach** button.

   Do not click the **Coach** button if the call is waiting in a queue after having been transferred by the agent to another queue. Doing so will cause your coach request to fail.

   The **Coach** button is not available when the agent transfers the call to another number (DN transfer).

2. Provide verbal instructions to the agent.
3. To remove yourself from the call, hang up. The call is removed from the Calls Being Monitored list.

Barging in on a Call

Authorized users can use the Barge-In function to join a call they are monitoring and participate in the conversation between the agent and the customer unless the call is transferred to another number (agent-to-DN transfer), after which the call is removed from the Calls Being Monitored list.

To barge in on a call:

1. While you are monitoring or coaching a call (as described in “Monitoring Calls” on page 309), and the call is connected to an agent (and not waiting in a queue), click the **Barge In** button.

   You are immediately connected to the call. The **Barge In** button disappears from the page.

2. To remove yourself from the call, hang up. The call is removed from the Calls Being Monitored list.

Viewing Call Monitoring Information

To view call monitoring information, click the **Call Monitoring** link on the CJP Management Portal.

The Call Monitoring page displays the following:

- Controls for requesting a monitoring session. For more information, see “Monitoring Calls” on page 309.
- A chart of active and queued calls for the queue that is currently selected in the Monitoring Filter panel on the left side of the page.
- The Monitoring Requests/Calls Being Monitored table, which displays the two lists described in the following sections:
  - Calls Being Monitored List
  - Monitoring Requests List

Note: If you resize the Call Monitoring window to a very narrow size, the Monitoring Requests/Calls Being Monitored table will be displayed at the bottom of the window. It might appear that the table is missing, but you can see it by scrolling to the bottom of the window.

Calls Being Monitored List

The Calls Being Monitored list displays information about all calls currently being monitored in your enterprise. Following is a description of each column in the list.

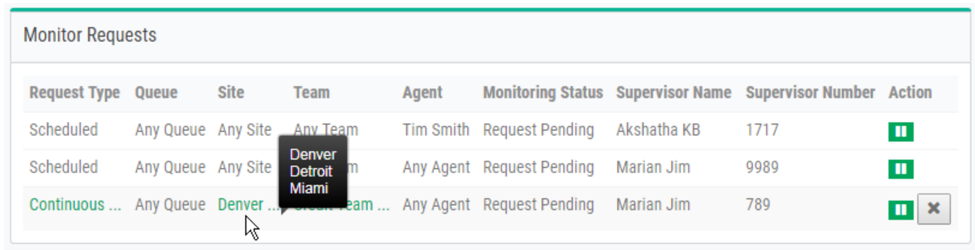
Note: When a monitored call is transferred to specific phone number (agent-to-DN transfer), it is removed from the Calls Being Monitored list and thus, the **Coach** and **Barge In** buttons are no longer available.

Column	Description
Queue	The queue that received the call.
Site	The contact center location to which the call was distributed.
Team	The team to which the call was distributed.
Agent	The name of the agent being monitored or a numeric ID code if the call was answered by a capacity-based team resource instead of by a CJP agent.
Monitoring Status	The status of the monitoring session: • **monitoring-started.** The monitoring supervisor has picked up the phone. • **connected.** The agent has picked up the call. • **CoachStarted.** The monitoring supervisor has started coaching the agent. • **barged.** The monitoring supervisor has barged in on the call.
Supervisor Name	The name of the person monitoring the call.
Supervisor Number	The phone number of the person monitoring the call.
Duration (mm:ss)	The number of minutes and seconds since the call arrived.
Action	Buttons that you can click to coach or barge in on a call that is being monitored, if authorized by your user profile.

Monitoring Requests List

The Monitor Requests list displays information about all monitoring requests in your enterprise.

If a monitoring request includes multiple queues, sites, teams, or agents, you can display a list of them in a tool tip by placing your mouse on a value in the Queue, Site, Team, or Agent column.



Following is a description of each column in the Monitoring Requests list.

Column	Description
Request Type	Three request types can appear in the list: • **Continuous.** The specified target (queue, team, site, or agent) will be continuously monitored until the request is paused or cancelled or until the monitoring duration is reached if the monitoring user specified a duration. You can point to the word *Continuous* to display a tooltip showing the duration of the monitoring request or *Unlimited* if no duration was specified. • **Scheduled.** A call monitoring schedule for the specified target has been set up and is running. • **Ad-Hoc.** The next call that matches the specified criteria will be monitored.
Queue	The queues included in the request. If multiple queues are included, you can display a list of them by pointing to the value displayed in the column.
Site	The sites included in the request. If multiple sites are included, you can display a list of them by pointing to the value displayed in the column.
Team	The teams included in the request. If multiple teams are included, you can display a list of them by pointing to the value displayed in the column.
Agent	The agents included in the request. If multiple agents are included, you can display a list of them by pointing to the value displayed in the column.
Monitoring Status	The status of the monitoring session: • **Request Pending.** The request has been submitted. • **Monitoring**. The supervisor has picked up the phone.
Supervisor Name	The name of the person who submitted the request.

Column	Description
Supervisor Number	The phone number of the person who submitted the request.
Action	Buttons you can click to pause, resume, or cancel a monitoring request.

Working with Monitoring Schedules

The Monitoring Schedules page in the Call Monitoring module enables authorized users to schedule call monitoring requests at specific times of the day or week. Note the following:

- Unless otherwise authorized by your user profile, you can view and edit only those call monitoring schedules that you created.
- The start and end times specified in the Call Monitoring Schedule use the enterprise time. However, calls are actually monitored in local time. Be sure to adjust for this when specifying start and end times in your monitoring schedules.

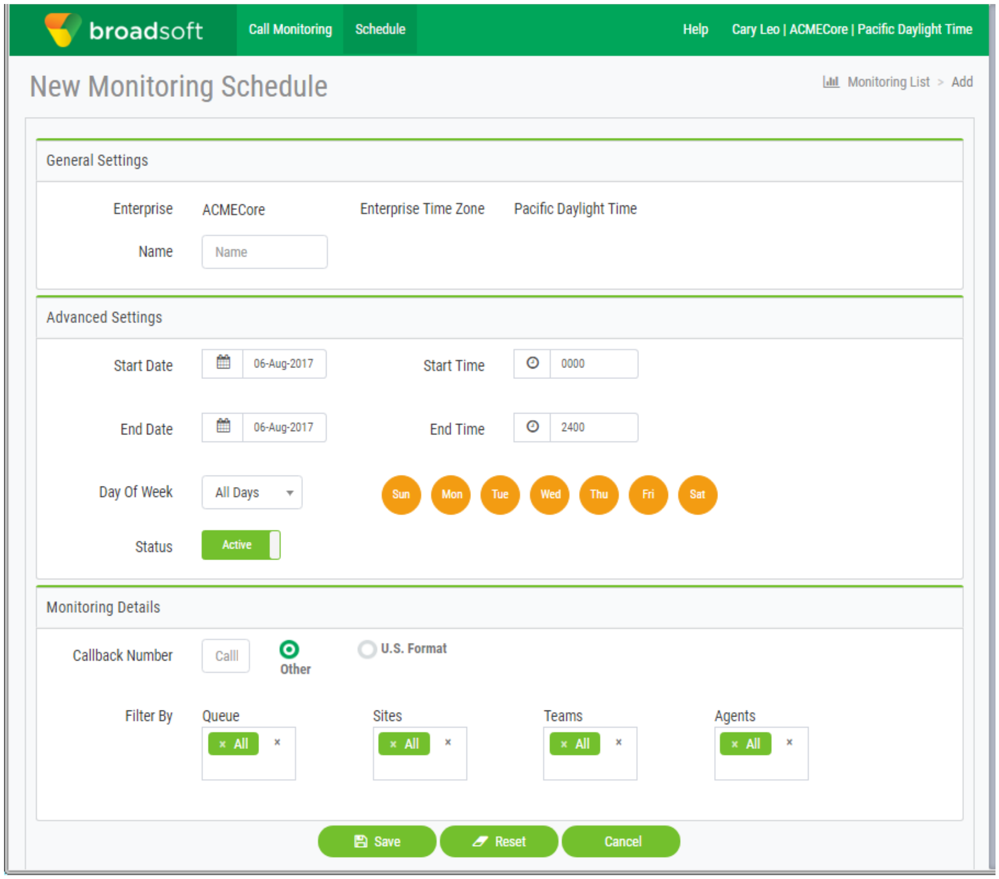
Topics covered in this section:

Creating or Editing a Monitoring Schedule

To create a new monitoring schedule or edit an existing one:

1. Open the **Call Monitoring** module and click the **Schedule** button on the menu bar.
2. To create a new schedule:
   - From the list view, click **New Schedule**.

     - OR -
   - From the calendar view, point to the schedule's beginning date and click the **Create** link that appears in the upper-left corner of the date box.
3. To copy or edit an existing schedule from the list view, click the ▪▪▪ button to the left of a listed schedule and select **Copy** or **Edit**.
4. On the page that appears, specify the appropriate settings as described in the following table, and then click **Save**.



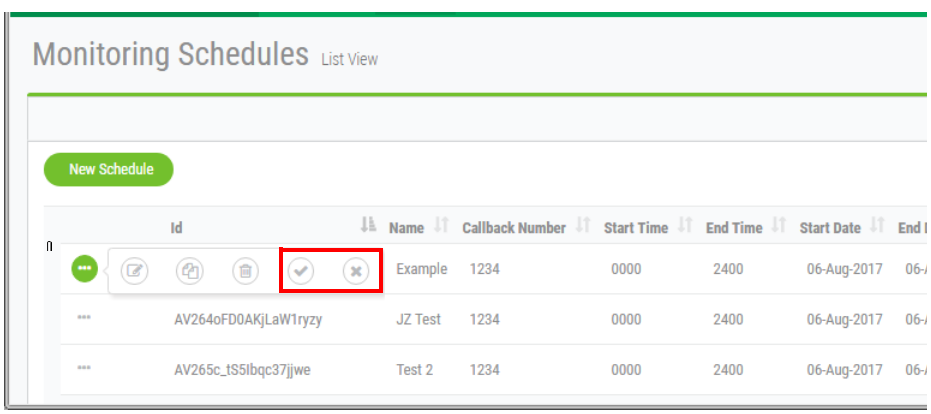
Setting	Description
Name	Enter a name for the schedule.
Start Date End Date	To select the start date (the date the schedule becomes effective) and end date (the date the schedule expires), click the appropriate calendar icon in the *Start Date* or *End Date* field, and then select a date from the calendar that appears.
Start Time End Time	Enter in 24-hour format (0000 to 2400) the time of day you want the schedule to start and end. Be sure to adjust for the fact that the time you specify in the Call Monitoring Schedule uses the enterprise time. However, calls are actually monitored in local time. **Note:** Pending monitor requests are checked every ‘n’ number of seconds as configured for your system. The default value is five minutes. When this checking function starts, each monitor request is checked and validated. If the request is past the scheduled deadline (that is, the End Time value), it is removed from the pending monitor requests list. Because of this added functionality, the scheduled end time may actually occur a few minutes later than specified.

Setting	Description
Day of Week	From the drop-down list, select **All Days** if you want the schedule to run every day or **Weekdays** if you want the schedule to run Monday through Friday only. -OR- Select each icon that represents a day during which you want the schedule to run.
Status	Select **Active** if you want the schedule to become effective at the specified start time on the specified start date. Otherwise, select **Not Active**.
Callback Number	Enter the phone number of where you want the audio sent. Select **U.S. Format** if this number has the format: 1 + area code + number. Select **Other** if not a U.S. format.
Filter By	Select the queues, sites, teams, and agents you want monitored as part of this schedule.

Activating and Deactivating Monitoring Schedules

You can activate or deactivate a monitoring schedule by editing the *Status* field in the settings for the schedule, or you can simply click a button in the list view Monitoring Schedules page as follows:

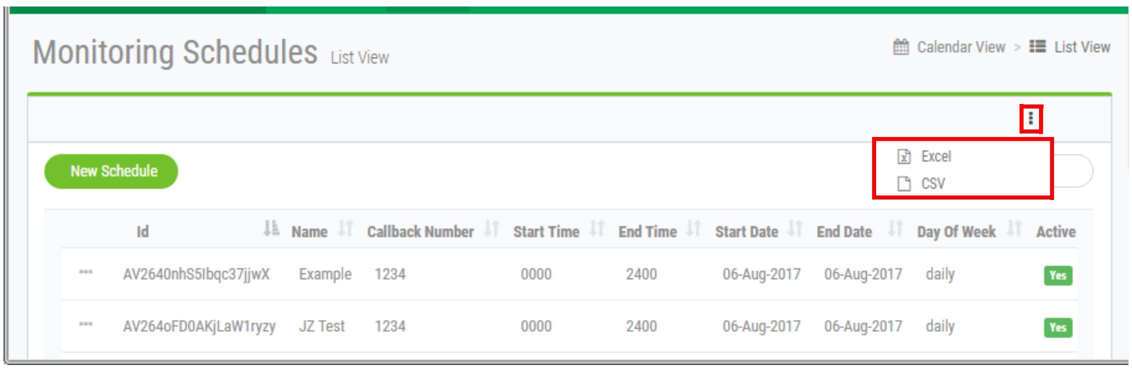
1. Open the **Call Monitoring** module and click the **Schedule** button on the menu bar.
2. Click the ••• button to the left of a listed schedule and select **Activate** or **Deactivate.**



Exporting the Monitoring Schedule List

To export the monitoring schedule list to a data analysis tool such as Microsoft Excel:

1. Open the **Call Monitoring** module and then click the **Schedule** button on the menu bar.
2. In the list view, click the ⋮ button on the upper-right side of the page header and select **Excel** or **CSV**.
3. In the dialog box that opens, either click **Open** to open the file, or click **Save**, navigate to the directory where you want to save the file, and then click **Save**.



Deleting a Monitoring Schedule

To delete a monitoring schedule:

1. Open the **Call Monitoring** module and click the **Schedule** button on the menu bar.
2. In the list view, click the ▪▪▪ button to the left of a listed schedule and select **Delete** from the drop-down list.
3. In the dialog box that opens, click **Yes** to confirm the deletion.

8 Call Recording

The optional Call Recording module enables authorized users to record any active call that is managed by the CJP service.

Authorized users can create recording schedules and choose the queue, team, site, and agent for which they want to record voice calls, and for what time period. The system then starts recording the calls that match the criteria.

Webex Contact Center transfers the recordings daily to your enterprise's recording repository over a secure encrypted virtual private network (VPN). The recording repository is a standalone server that is present at a location of your enterprise's choice, such as the contact center premise location or data facility.

Note: Regardless of the call recording duration, the first two hours of each call recording is available in the Webex Contact Center.

The recordings are in standard .wav format. Authorized users can access these recordings directly and review them using standard third-party utilities. You can also use the features of the optional CJP Recording Management module to search for and play the recorded files.

Note: The CJP Recording Management module records the calls routed to the overflow destination number, but doesn't list them in the UI.

Topics covered in this chapter:

- Creating or Editing a Recording Schedule
- Deleting a Recording Schedule

Creating or Editing a Recording Schedule

To create or edit a call recording schedule:

1. Open the **Call Recording** module and on the page appears, select a queue from the **Queue** drop-down list.

   All call recording schedules for that queue are displayed. From here, you can:

   - Add a new schedule
   - Edit or view an existing schedule
   - Delete an existing schedule
   - Copy an existing schedule
   - Switch between a list view and calendar view of all schedules for this queue.

2. To create a new schedule:

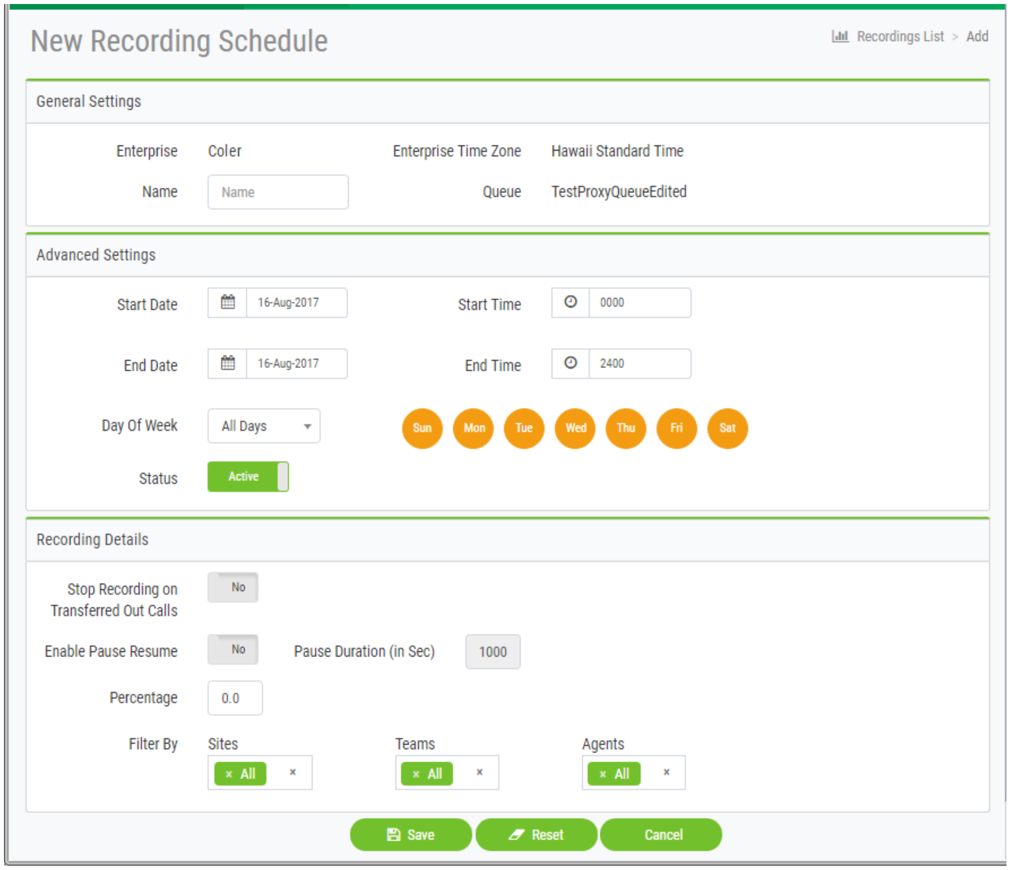
   - From the list view, click **New Schedule**.

     \- OR -

   - From the calendar view, point to the schedule's beginning date and click the **Create** link that appears in the upper-left corner of the date box.

3. To copy or edit an existing schedule, from the list view, click the ▪▪▪ button to the left of a listed schedule and select **Copy** or **Edit**.

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



Setting	Description
Name	Enter a name for the schedule.
Start Date End Date	To select the start date (the date the schedule becomes effective) and end date (the date the schedule expires), click the appropriate calendar icon, and then select a date from the calendar that appears.
Start Time End Time	Enter in 24-hour format (0000 to 2400) the time of day you want the schedule to start and end.
Days of Week	From the drop-down list, select **All Days** if you want the schedule to run every day or **Weekdays** if you want the schedule to run Monday through Friday only. -OR- Select each icon that represents a day during which you want the schedule to run.
Status	Select **Active** if you want the schedule to become effective at the specified start time on the specified start date. Otherwise, select **Not Active**.
Stop Recording on Transferred Out Calls	Select **On** if you want recording to stop when a call is transferred.

Setting	Description
Enable Pause Resume	Select **On** if you want the agent to have access to the Privacy Shield icon during call recording so that the agent can pause and resume recording. For example, the agent might need to pause potential call recording while obtaining a credit card number or other protected information. Be sure to instruct agents regarding when to use this feature. **Note:** The Privacy Shield icon is displayed on the Agent Desktop only if the Privacy Shield feature is enabled in your CJP service configuration.
Pause Duration (in Sec)	If you set *Enable Pause Resume* to **On**, enter the number of seconds that recording will be paused if the user does not click the *Turn Off Privacy Shield* button earlier.
Percentage	Specify the percentage of the total number of current calls you want recorded for this queue.
Filter By	Select the sites, teams, and agents you want to include in your recording schedule. **Note:** Outdial call recording is based on the site, team, and agent who makes the outdial call. For example, if a recording schedule is created for the Outdial queue and a site named Chicago, then only those outdial calls made by teams under the Chicago site will be recorded, and not calls made from other sites.

Deleting a Recording Schedule

To delete a recording schedule:

1. Open the **Call Recording** module and in the list view, make a selection from the **Select Queue** drop-down list.

   The recording schedules for the selected queue are displayed.

2. Click the ▪▪▪ button to the left of a listed schedule and **Delete** 🗑.

9 Recording Management

The optional CJP Recording Management module enables authorized users to search for and play audio files recorded through the CJP Call Recording feature. In addition, authorized users can create tags that can be assigned to audio files for use as search criteria, specify which CAD variables to store with recordings, create custom attributes, and view recent Recording Management activity.

Note: The Recording Management module is available to authorized users of the CJP Salesforce Edition through the **Voice Recording** tab.

Topics covered in this chapter:

Searching for and Playing Recordings

To search for and play a recording:

1. Open the Recording Management module and on the **Search** page, select one or more queues and sites or use the default **All** settings.

   - You can enter one or more characters in a list box to display only the listed entities that include the character sequence you entered.
   - The Queues, Sites, and other lists are populated based on your access privileges.

2. After you select one or more sites, the teams and agents associated with the selected sites are displayed in the Teams and Agents lists. Select one or more teams and agents or use the default **All** settings.

   - When you select one or more teams, only the agents associated with those teams are displayed in the Agents list. If no teams are selected, then all agents associated with the selected sites are displayed.
   - If you want to exclude deleted agents from the search., click the **Exclude Deleted Agents** check box.

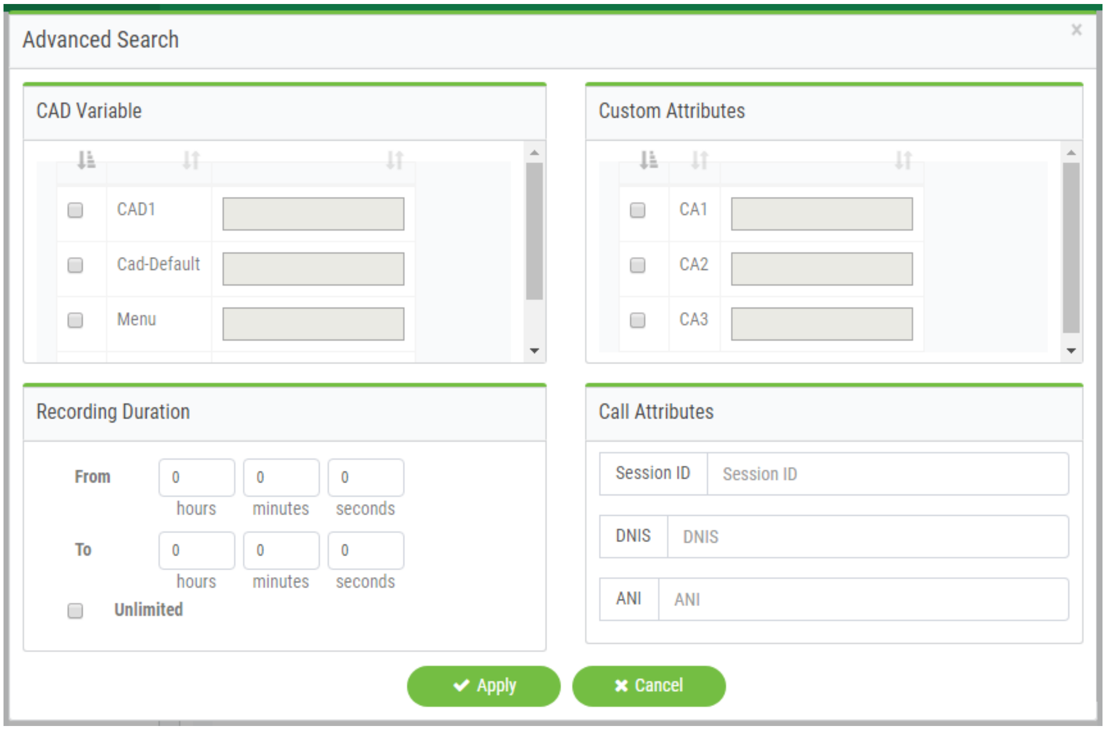
3. To filter the search based on wrap-up codes, select one or more codes from the **Wrap Up Codes** list.

4. If tags (text strings that can be assigned to recordings) have been defined and assigned to recordings, you can filter the search based on tags by selecting them in the **Tags** list. For more information, see “Assigning and Removing Tags” on page 329 and “Creating and Exporting Tags” on page 330.

5. To filter the list based on additional criteria, clicked the **Advanced Search** button, and in the dialog box that opens:

   - You can filter the search based on call-associated data (CAD) values by selecting the check box to the left of one or more entries in the **CAD Variables** list and entering a CAD value for each selected variable.
   - If your Recording Management installation includes custom attributes, you can filter the search based on custom attribute values by selecting the check box to the left of one or more entries in the **Custom Attributes** list and then entering a custom attribute value for each selected attribute.
   - You can enter values in the fields displayed under **Call Attributes** to filter the search based on **Session ID**, **DNIS** (the number the caller dialed), or **ANI** number (either the caller’s phone number or, in the case of an outdial call, the phone number of the agent who made the outdial call).

- You can enter values in the **Recording Duration** fields to specify the minimum and maximum length of recording to search for or select the **Unlimited** check box to search for a recording of any length.



6. Use the calendar controls in the **Date** fields to specify a data range.

7. To search for audio files that were deleted less than 30 days ago, select the **Search Deleted Files** check box. Note the following:

   - Files that were manually deleted and files that have been deleted for 30 days or more are permanently removed from the system.

   - To play a deleted audio file, you must first restore it as described in step 9.

8. To reset all lists and fields and start over again, click the **Reset** button.

9. Click the **Search** button to start the search.

   If audio files meeting your search criteria are found, they are listed on the Search Results page. Otherwise, *No records available* message is displayed on the page.

   To restore a deleted audio file, click the ••• button to the left of a listed recording and select **Restore**.

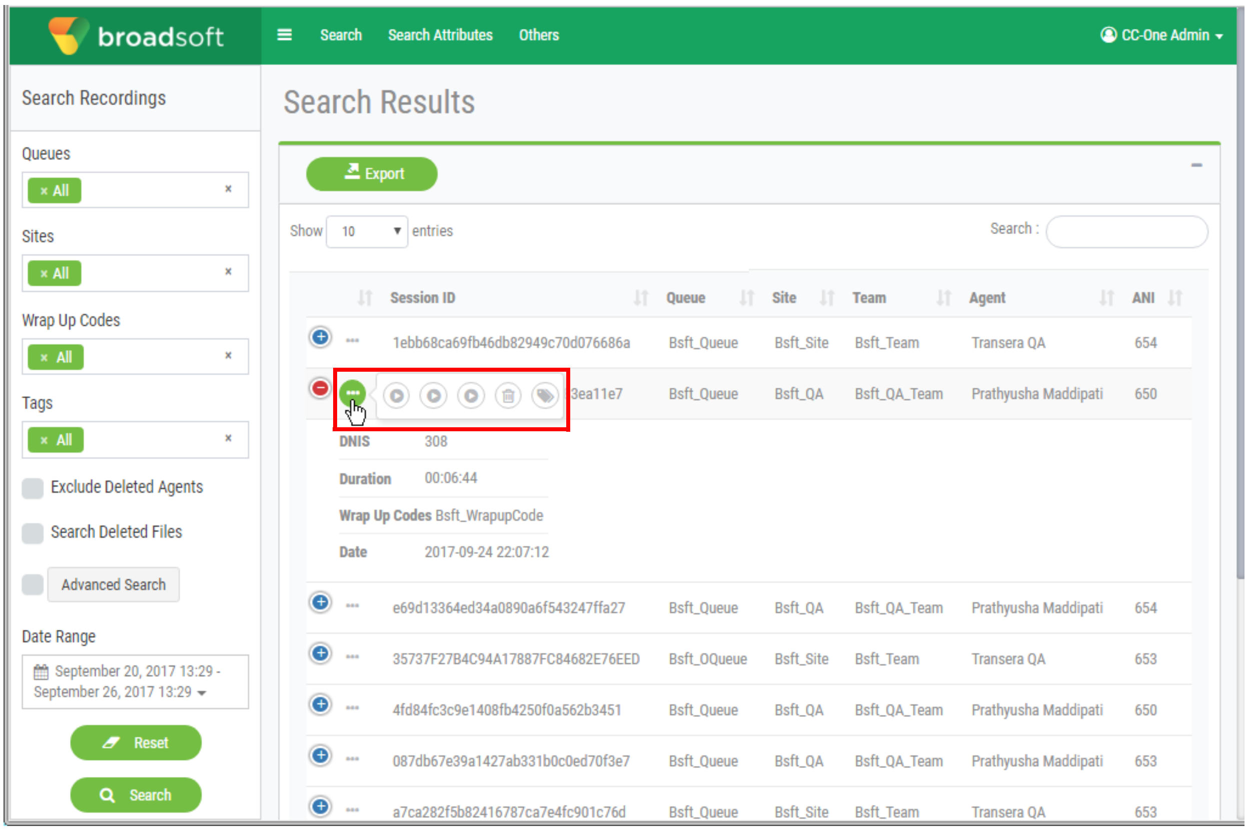
If your browser window is too narrow to display all columns:

➤ Click the plus button to the left of a listed recording to display additional details about the recording.

To play a recording:

- Click the ••• button to the left of a listed recording and select **Stereo** to play the audio of both the agent and caller.

  If Leg Recording is enabled for your enterprise, three play buttons are available when you click the ••• button, as shown in the next illustration. Select **Agent** to play just the agent audio; select **Caller** to play just the caller audio.



To permanently delete a recording:

- Click the ••• button to the left of a listed recording and select **Delete** .

To assign a tag to a recording or remove a tag from a recording:

- Click the ••• button to the left of a listed recording and select **Tags** . For more information, see the next topic, “Assigning and Removing Tags.”

To view custom attribute value:

- Click the ••• button to the left of a listed recording and select **Tags** to open a dialog box that displays the custom attribute values.

To export the search results to an Excel spreadsheet:

- Click **Export** button on the upper-left side of the results page.

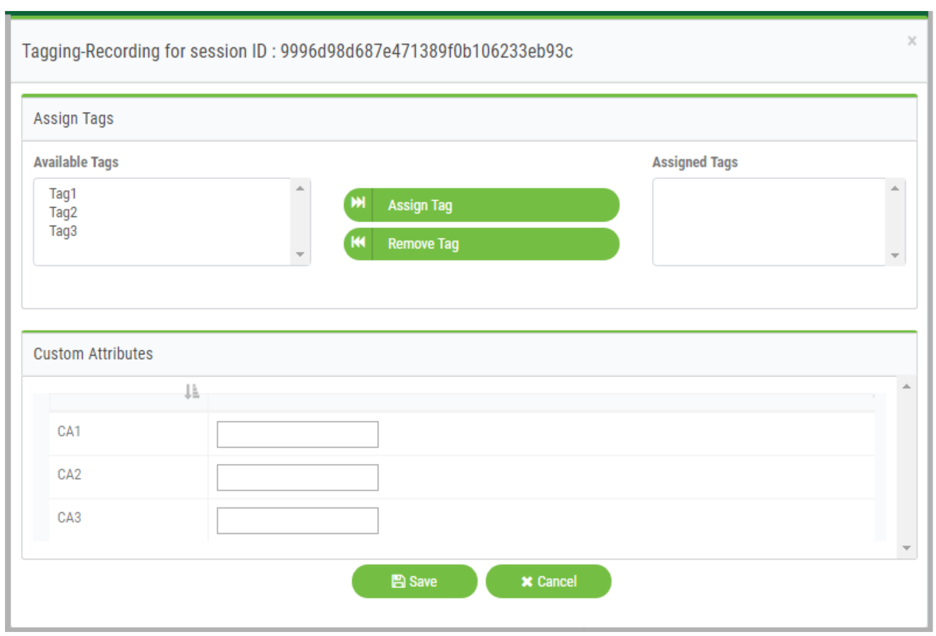
Assigning and Removing Tags

You can assign the same tag to multiple recordings and you can assign multiple tags to an individual recording.

To assign a tag to a recording or remove a tag from a recording:

1. Open the Recording Management module and on the **Search** page, perform a search for the recordings you want to either assign tags to or remove tags from as described in "Searching for and Playing Recordings" on page 326).
2. Click the ■■■ button to the left of a listed recording on the Search Results page and select **Tags** .

   On the upper part of the dialog box that opens, the list of tags assigned to the recording is displayed on the right and a list of tags that are available is displayed on the left.
3. To assign a tag to the recording, select a tag in list on the left and click the **Assign Tag** button to move it to the list on the right.
4. To remove a tag from the recording, select a tag in the list on the right and click the **Remove Tag** button to move it to the list on the right.
5. When you are finished, click **Save**.

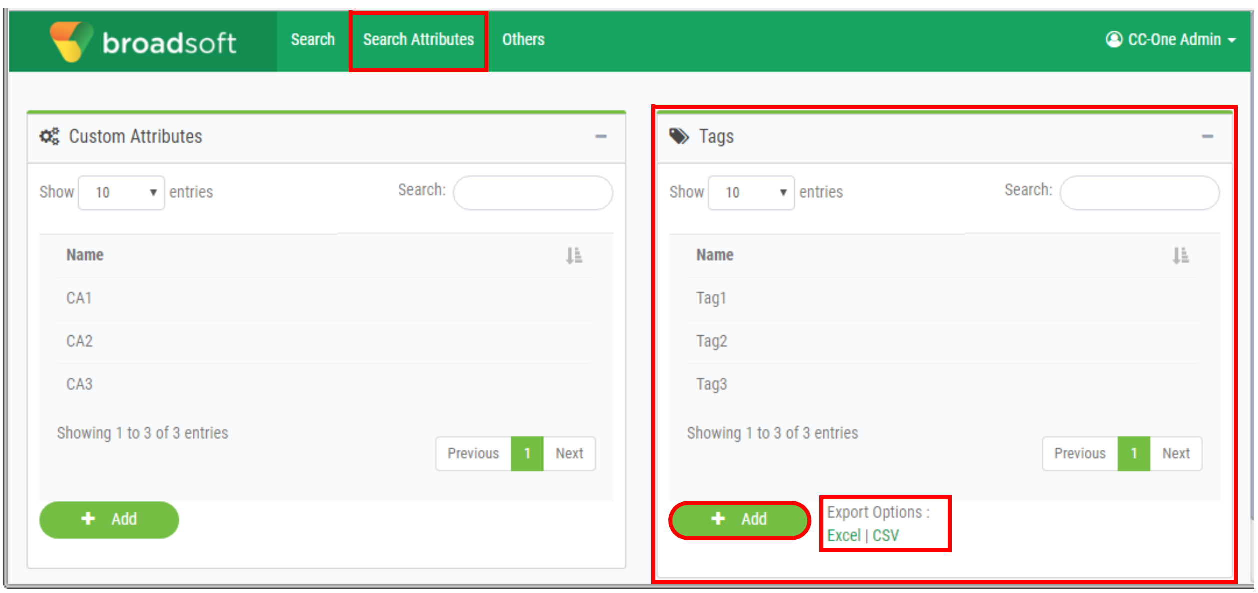


Creating and Exporting Tags

The Tags section of the **Recording Management > Search Attributes** page enables authorized users to create and export a list of tags that can be assigned to recordings (see “Assigning and Removing Tags” on page 329).

To create a tag or export a list of tags:

1. Open the Recording Management module and select **Search Attributes** on the menu bar.
2. In the **Tags** section of the page that appears, do one of the following:
    - To create a tag, click **Add** and in the dialog box that opens, enter a name for the tag and click **Save**.
    - To export the list of tags, click the **Excel** or **CSV** link beneath the tags list and in the dialog box that opens, click **Open** to open the file, or click **Save**, navigate to the directory where you want to save the file, and then click **Save**.

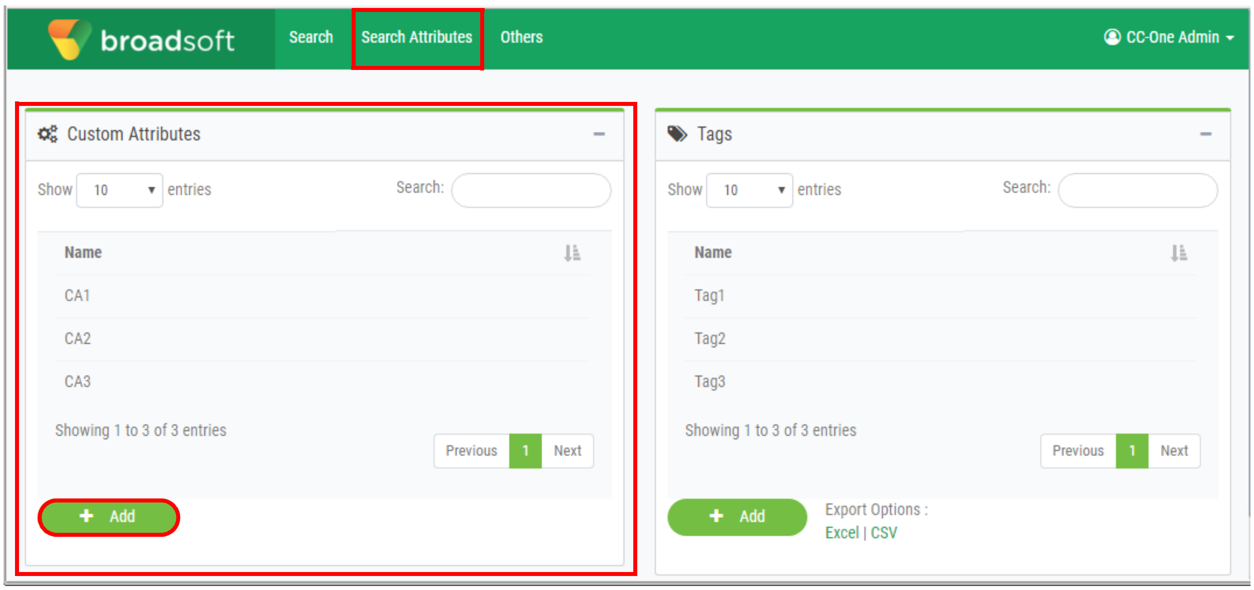


Creating and Modifying Custom Attributes

The Custom Attributes section of the **Recording Management > Search Attributes** page enables authorized users to create attributes that can be saved with recordings and later searched for.

To create a custom attribute:

1. Open the Recording Management module and select **Search Attributes** on the menu bar.
2. In the **Custom Attributes** section of the page that appears, click **Add** and in the dialog box that opens, enter a name for the customer attribute and click **Save**.

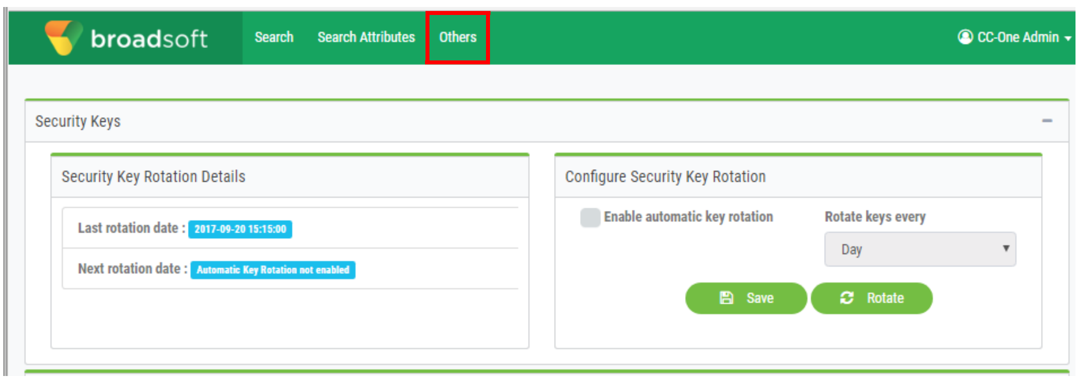


Viewing and Changing the Security Key Schedule

If your installation includes the encryption option, each recording file for your enterprise is encrypted using a public key that is randomly generated. When a user requests a recording file, the Recordings Server software decrypts the file using a randomly generated private key. A new set of public and private keys can be generated periodically based on settings specified in the Security Keys tab.

If your user profile authorizes you to access the Security Keys page, you can view and change the schedule for generating security key pairs:

➤ Open the Recording Management module and click the **Others** button on the menu bar.



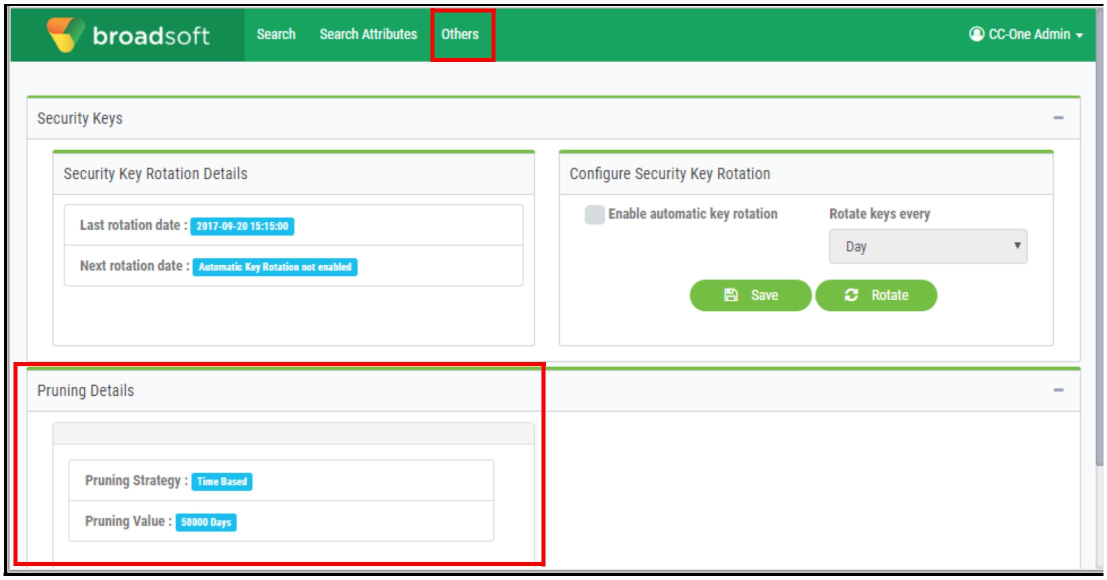
The upper part of the page displays the two groups of Security Key settings described in the following table.

Setting	Description
Security Key Rotation Details	
Last Rotation Date	The date when a new security key pair was last generated. For a new installation, the value in this field is N/A (not available).
Next Rotation Date	The date when a new security key pair will be generated.
Configure Security Key Rotation	
Enable Automatic Key Rotation	Select this check box if you want to specify a time interval for automatically generating a new security key pair, and then from the **Rotate keys every** drop-down list, select **Day**, **Week**, **Month**, **Three Months**, **Six Months**, or **Year**.
Rotate	Select this button to generate a new key pair immediately.
Save	Click this button to save your settings.

Viewing the Pruning Details

If your user profile authorizes you to access the Pruning Details settings, you can view the pruning strategy settings specified for your enterprise:

➤ Open the Recording Management module and click the **Others** button on the menu bar.



The lower part of the page displays the Pruning Detail settings described in the following table.

Pruning Strategy	Pruning Value
No Pruning	**0**—No pruning occurs.
Time Based	The number of months to retain recordings. Recordings made prior to the specified number of months are deleted. **Note:** • A month is defined as 31 days, and one additional day is added to the total number of days before the recordings are deleted. Thus, 1 month means 32 days; 2 months means 31 days x 2 + 1 day = 63 days. • For some enterprises, the value will be displayed as days.
Agent Minutes	The maximum number of minutes of recordings per agent. When the maximum number of minutes is reached, the oldest recordings are deleted to make room for new recordings.
Storage Based	The limit on the total recording size in megabytes. When the limit is reached the oldest recordings beyond the specified storage value are deleted.

10 Multimedia Provisioning

The CJP Multimedia Provisioning module enables administrators to view and provision resources used for email and chat.

Topics covered in this chapter:

Users

The **Agents** page, accessed by selecting **Manage Users > Agents** from the Multimedia Provisioning menu, displays a list of the following CJP users at your enterprise:

- All CJP users whose roles include Edit access to the MM Provisioning module. These users are designated as supervisors in Multimedia Provisioning.
- All CJP agents who are assigned a multimedia profile and multimedia extension.

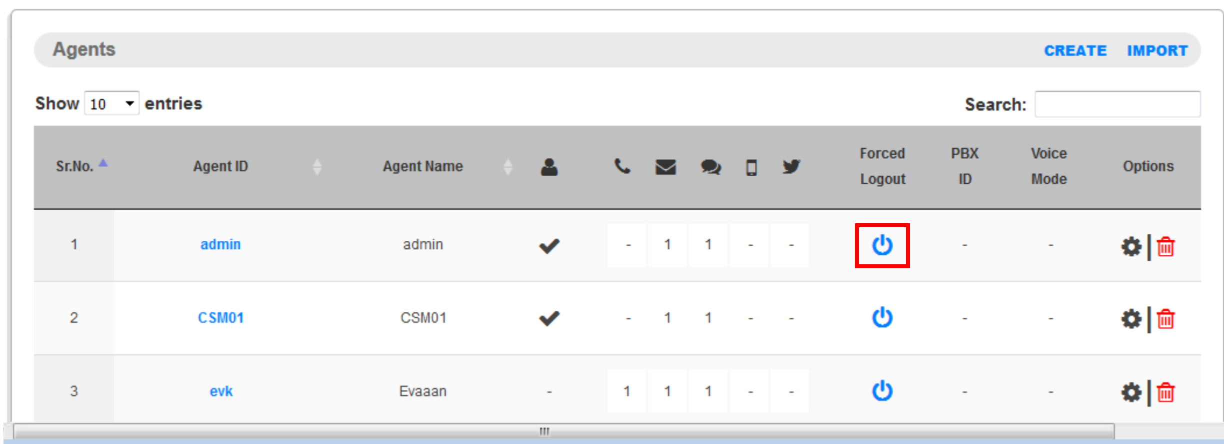
Do not use any of the controls on the **Agents** page except **Forced Logout**.

To add or delete a user or edit user settings, use the controls available in the Management Portal Provisioning module: see “Multimedia Profiles” on page 62 and “CJP Users” on page 99.

To log out an agent:

1. Select **Manage Users > Agents** from the Multimedia Provisioning menu.

   On the Agents page, click the **Forced Logout** icon in the row where the agent is listed.



Queues

Topics covered in this section:

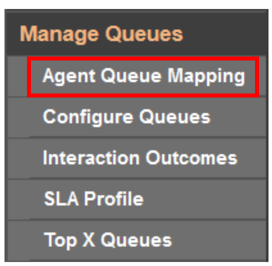
- Assigning Agents to Queues
- Removing Agents from a Queue
- Creating, Editing, or Deleting a Queue

Assigning Agents to Queues

Agents must be assigned to queues in order to be assigned contacts by the Queue Manager.

To assign agents to a queue:

1. Select **Manage Queues > Agent Queue Mapping** from the Multimedia Provisioning menu.



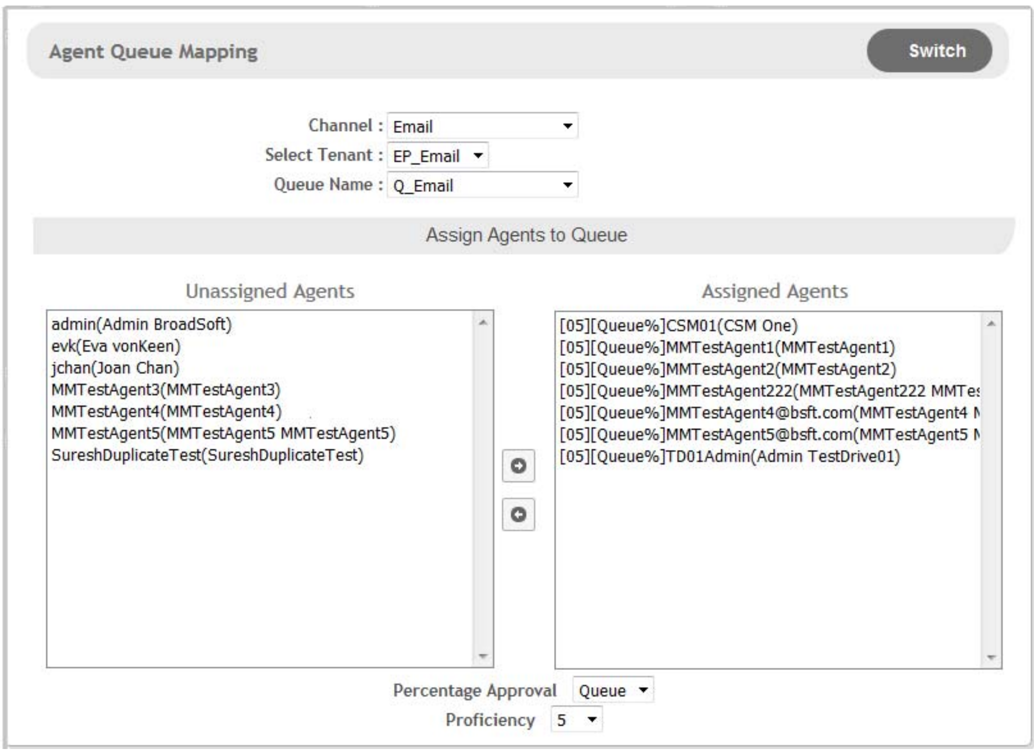
2. The Agent Queue Mapping page displays the **Assign Agents to Queue** settings.
    - If you want to assign multiple agents to a queue, use the displayed settings.
    - If you want to assign a single agent to multiple queues, click the **Switch** button on the upper right side of the page to display the **Assign Agents to Queues** settings.
3. If you are assigning agents to a queue:
    a. From the three drop-down lists, select a channel, then a tenant, and then a queue.

    The **Unassigned Agents** list displays all the agents who are enabled for the selected queue but are not currently assigned to the queue.

    The **Assigned Agents** list displays all the agents currently assigned to the selected queue. The format shown in the Assigned Agents list denotes the following:

    [Proficiency][Supervisor Approval Percentage]Agent Login(Agent Preferred Name)

Field	Description
Proficiency	The first number denotes the proficiency assigned to the agent for the queue: 1 is the lowest and 10 is the highest.
Supervisor Approval Percentage	Queue: Indicates that the agent will be assigned the Supervisor Approval Percentage set at the queue level. 0-100: Indicates the Supervisor Approval Percentage set for the agent. If set, this value overrides the value set at the queue level.
Agent Login	The login ID of the agent.
Preferred Name	The preferred name as configured.



b. Select one or more agents in the **Unassigned Agents** list, then select the **Percentage Approval** and **Proficiency** setting you want to assign to the selected agents, and click the right-arrow button to move them to the **Assigned Agents** list.

c. Repeat the previous step for each agent or group of agents you want to assign to the queue.

Removing Agents from a Queue

Agents need to be removed from the queues for various reasons. Before deleting an agent, you must remove them from all the queues they are assigned to.

To remove agents from their assigned queues:

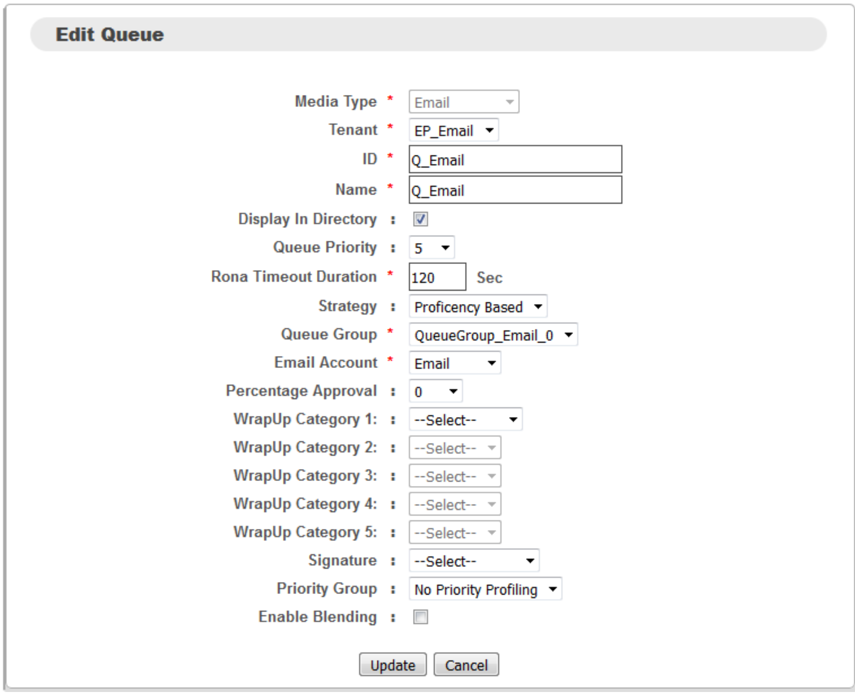
1. Select **Manage Queues > Agent Queue Mapping** from the Multimedia Provisioning menu.
2. On the Agent Queue Mapping page, select an agent in the **Assigned Agents** list and click left-arrow button to move the agent to the **Unassigned Agents** list.

Creating, Editing, or Deleting a Queue

To create, edit, or delete a queue:

1. Select **Manage Queues** > **Configure Queues** from the Multimedia Provisioning menu.
2. On the **Queues** page that appears, do one of the following:
    - To create a new queue, click the **Create** link on the upper right side of the page to display the Add Queue page.
    - To edit a queue, click the name of a queue listed in the Name column to display the Edit Queue page.
    - To delete a queue, click the **Delete** link for the queue you want to delete. Then in the confirmation dialog box, click **OK**.
3. If you are creating or editing a queue, specify or change the settings for the queue and then click **Save** (if you are creating a new queue) or **Update** (if you are editing an existing queue).

    The fields are described in the table following the illustration showing settings for an email queue.



Field	Description
Media Type	Select the type of channel that this queue is assigned to. This field cannot be changed.
Tenant	Select the entry point.
Name	Enter a name for the queue.
Display In Directory	If this option is selected, then when a contact that does not match a key word arrives at the contact center and is routed to the default queue, that contact can be transferred to this queue.
Queue Priority	Select a number to specify the priority: 1 is the lowest and 10 is the highest.
Rona Timeout Duration	Enter the number of seconds the contact should wait before being transferred back to the queue if the agent does not accept it.
Strategy	Select a contact assignment strategy: • **Proficiency Based:** Contacts will be assigned according to the proficiency of the agent. Agents with higher proficiency will receive contacts first. • **Most Idle:** Contact will be assigned to the agent who has been idle the longest. • **Round Robin:** Contacts will be assigned to agents using the round robin algorithm.
Queue Group	Select the default group to which the queue belongs.

Field	Description
Email Account	If Email or Chat is selected in the Media Type field, specify the email account to be used for sending out emails coming through this queue or for sending email transcripts.
Percentage Approval	If Email is selected in the Media Type field, select a number from the drop-down list to specify the percentage of emails that will be sent for supervisor approval from the overall emails present in the queue (see "Configuring Percentage Approval" on page 370).
WrapUp Category	The wrap-up codes into which the emails can be segregated. Wrap Up categories have multiple levels (up to 5).
Signature	If Email is specified in the **Media Type** field, select the template (article) for email signature (see "Articles Library" on page 344).
Chat Transcript Templates	If **Chat** is specified in the Media Type field, select the chat transcript template (see "Chat Transcript Templates" on page 376).
Priority Group	Leave this set to **No Priority Profiling**.
Enable Blending	This setting is not used.

Key Words

Topics covered in this section:

- Creating Keyword Groups
- Deleting Keywords
- Deleting a Keyword Group

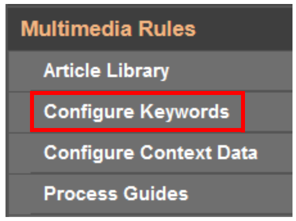
Creating Keyword Groups

A keyword groups represents a group of keywords that may be present in a contact. These keywords can then be analyzed by Multimedia Provisioning and the contact can be routed to a specific queue.

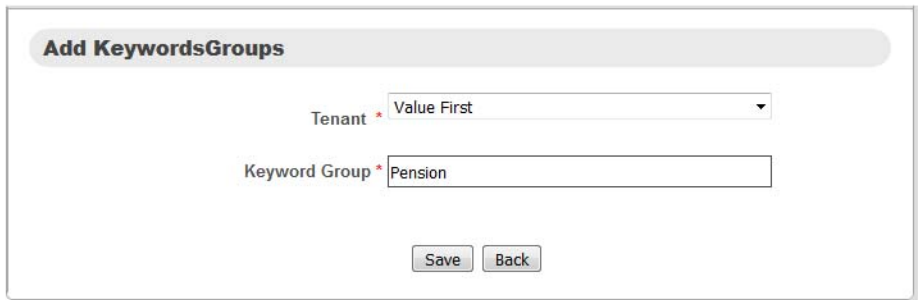
For example, if the words "travel", "baggage delayed" are found in an incoming contact, the contact could be routed to the Travel Insurance queue.

To create a key word group:

1. Select **Multimedia Rules > Configure Keywords** from the Multimedia Provisioning menu.

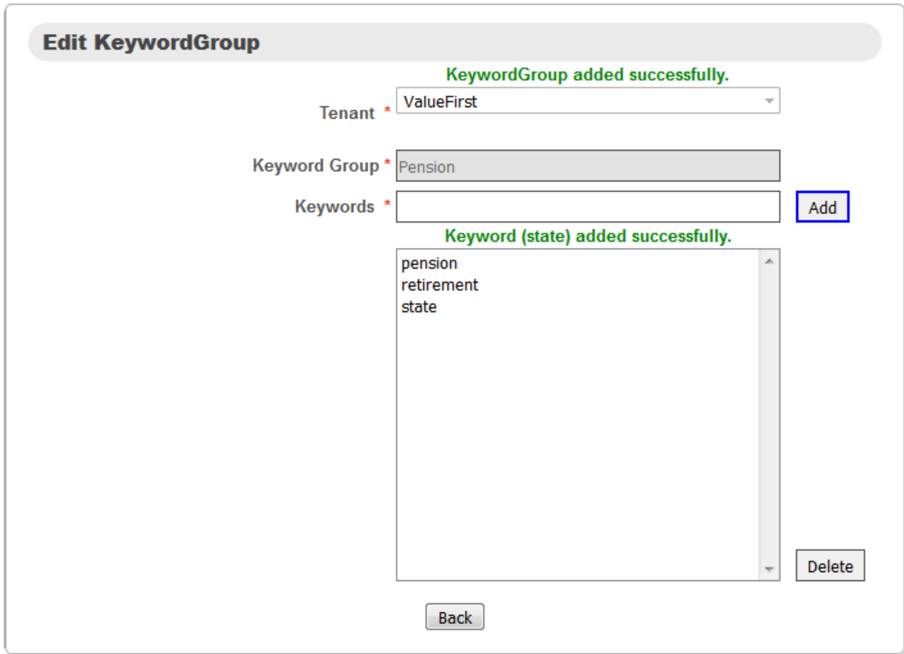


2. Click **Create** on the upper-right side of the page that appears, and then select a tenant from the drop-down list, enter a name in the **Keyword Group** field, and click **Save.**



After you click Save, the Edit page appears, where you can add keywords.

3. Enter the keyword to be searched for in the incoming contacts and click **Add** to add it to the keyword group. Repeat for each additional word you want to add to the group.



4. After you have added all the keywords to the keyword group, click the **Back** button to return to the list of keyword groups.

Deleting Keywords

To delete a keyword:

1. Select **Multimedia Rules > Configure Keywords** from the Multimedia Provisioning menu.
2. On the **Manage Keyword Groups** page, click the name of the listed keyword group that includes the keywords you want to delete.
3. On the page that appears, select the keywords that you want to delete and click the **Delete** button. Then, in the confirmation dialog box, click **OK**.

Deleting a Keyword Group

To delete a keyword group:

1. Select **Multimedia Rules > Configure Keywords** from the Multimedia Provisioning menu.
2. On the **Manage Keyword Groups** page, click the **Delete** link for the listed keyword group you want to delete. Then, in the confirmation dialog box, click **OK**.

Articles Library

Articles in Multimedia Provisioning are canned response templates that can be used to send auto-responses, append signatures, and make suggestions to agents that can help them send a pre-configured response directly to the customer without having to repetitively type the same content.

Topics covered in this section:

- Creating an Article
- Using Macros in an Article
- Adding an Image to an Article
- Adding a Hyperlink to an Article
- Formatting Text in an Article
- Editing an Article
- Deleting an Article

Creating an Article

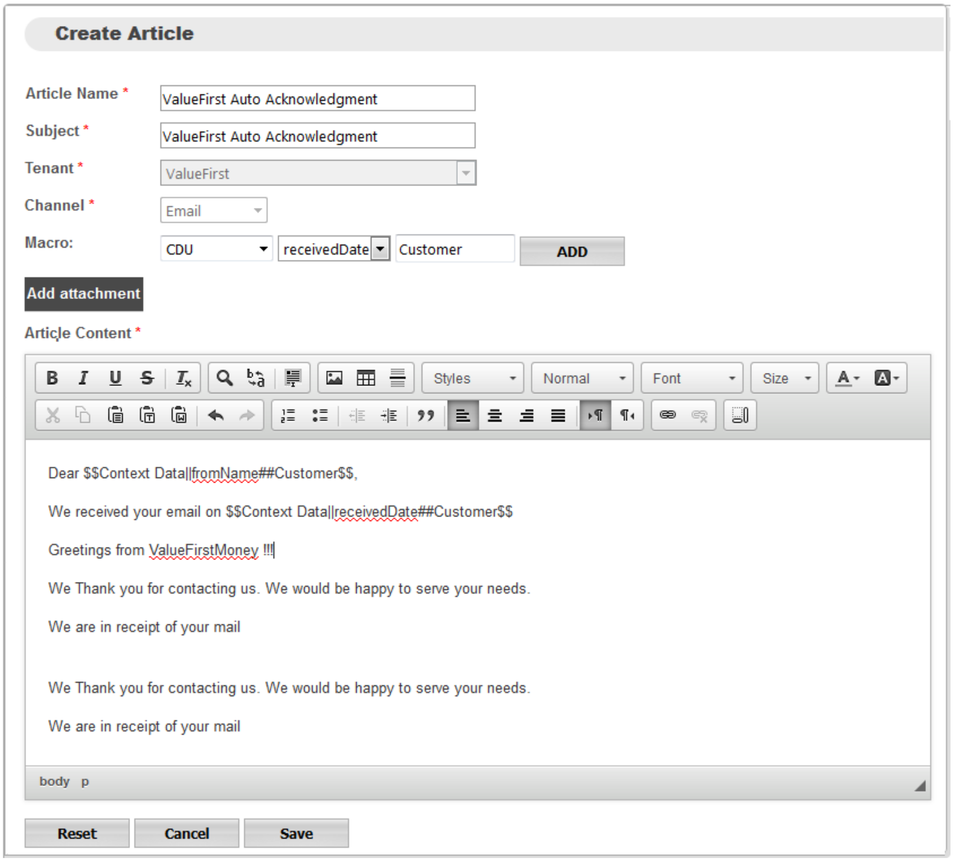
To create a new article:

1. Select **Multimedia Rules > Article Library** from the Multimedia Provisioning menu.

2. On the Articles page, click **Create Article**.

   Note: When you create an article, a banner containing an alert message "Do not share PII, Financial, or Health information in the email content or attachments" appears on top of the article composer.

3. Enter the details of the article as described in the following table and then click **Save**.



Field	Description
Article Name	Enter a name for the article.
Subject	Enter the subject of the article.
Tenant	Select the appropriate entry point from the drop-down list.
Channel	Select the channel that this article will belong to.
Content	Enter the content of the article. For information, see: • “Adding an Image to an Article” on page 347 • “Adding a Hyperlink to an Article” on page 349 • “Formatting Text in an Article” on page 350
Macro	Macros are replaceable codes in an article that can be substituted with values from the CDU or session (see “Using Macros in an Article” on page 346 for more information).

PCI Compliance

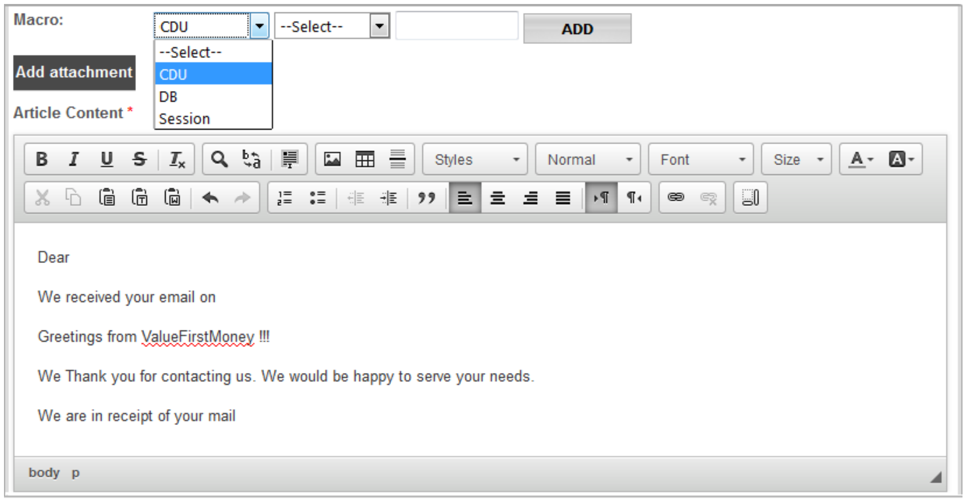
CJP ensures Payment Card Industry-compliance (PCI-compliance) to protect your organization from loss of cardholder data through Email and Chat messages and attachments. By default, attachments of the following file types are supported for Email and Chat messages: html .mhtml .mht .odt .pdf .pdfxml .rtf .shtml .xps .xml .xhtml .txt .eml .msg .ods .dot .dothtml . dotx .dotm .pot .pothtml .ppthtml .pptmhtml .pptxml .potm .potx .pps .ppam .ppsm .ppsx .ppt x .pptm .ppt .pub .pubhtml .pubmhtml .xls .xlshtml .xlthtml .xlt .xlsm .xltx .xltm .xlam .xlsb .xlsx

When agents receive or send email or chat messages, attachments are dropped from the inbound messages if cardholder data is detected. Attachments containing cardholder data cannot be added to outbound email or chat messages. The upload fails. If cardholder data is detected in an inbound or outbound email (subject line or email body) or chat message, the cardholder data is redacted (masked) by default.

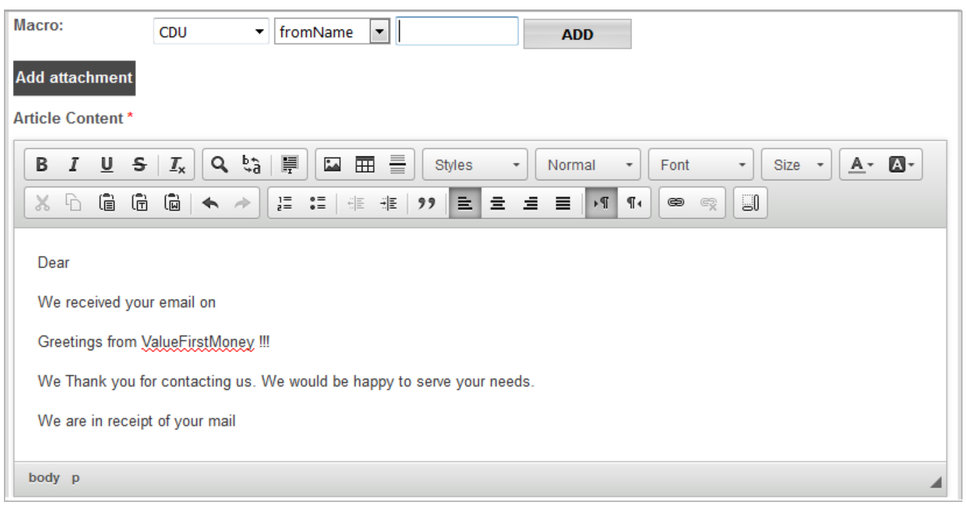
Using Macros in an Article

To use a macro in an article:

1. While creating or editing an article, place the cursor where the macro is to be inserted and then select the source for the macro from the first drop-down list. The value selected in the following example is **CDU.**



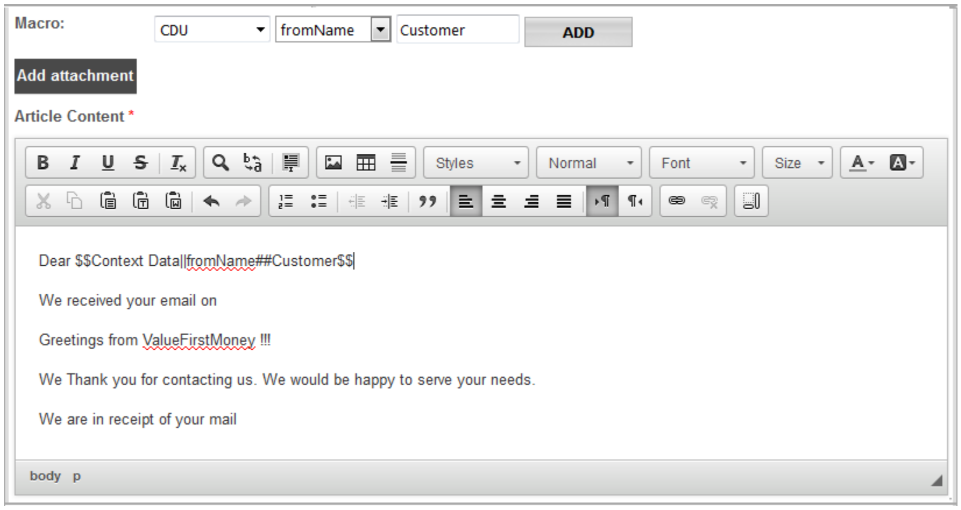
2. Select the key from the second drop-down list. The value present in the key will replace the macro in the template.



3. In the text box to the right of the key drop-down list, enter the alternate value that will be displayed if the macro is not found.

4. Click the **Add** button to the right of the text box.

   In the following example the customer name (retrieved from the CDU) will be displayed next to the word **"Dear"** and the word **"Customer"** will be used if customer name is not found within the context.



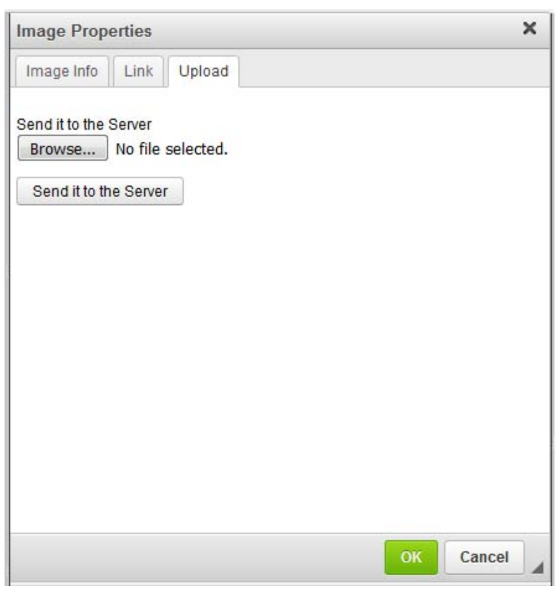
Limitations:

- Currently the DB macros are not supported.
- Do not use Session macros in Auto Acknowledgements because Agent Session data is not available when Auto Acknowledgements are sent.

Adding an Image to an Article

To add an image to an article:

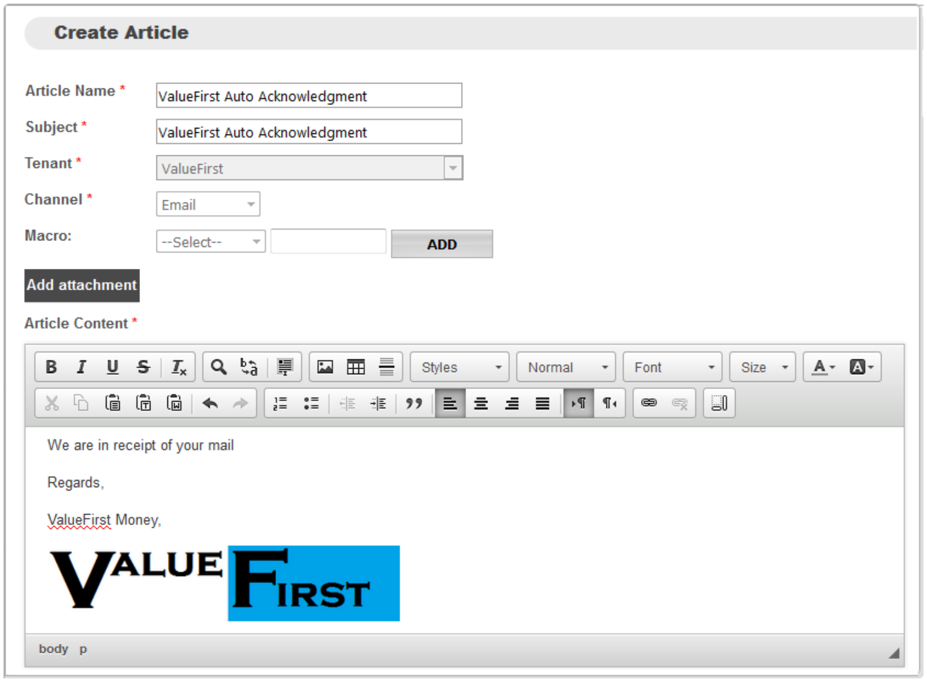
1. While creating or editing an article, click the image icon in the tool bar above the content area of the article.
2. In the Image Properties dialog box that appears, select the **Upload** tab, and then click the **Browse** button.



3. In the File Upload dialog box that appears, navigate to the location where the image is stored, select the image, and click **Open**.

4. In the Image Properties dialog box, click the **Send it to the Server** button, and then click **OK**.

   The image is added to the article as shown in the next illustration.

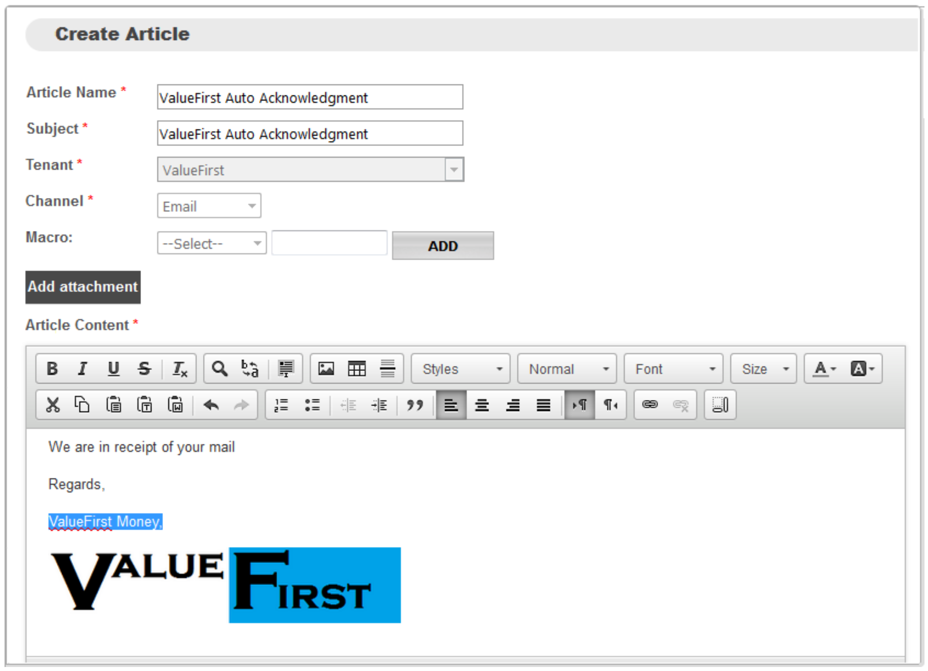


Adding a Hyperlink to an Article

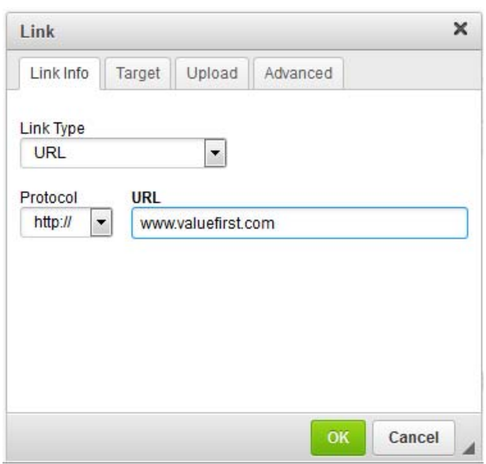
Hyperlinks that point to external websites can be added to articles.

To add a hyperlink to an article:

1. Type a word or a sentence and select it.



2. Click the **Link** button to add a hyperlink to the selected words.
3. In the **Link** dialog box, enter the URL in the **URL** text box and click **OK**.



4. Click **Save** to save the article.

   The saved article appears in the Articles list.

Formatting Text in an Article

You can format the text in the content of an article using the text formatting options provided on the **Create Article** and **Edit Article** pages.

➤ In the article content area, select the text you want to format and then click a text formatting button.

Button	Format
B	Makes the selected text bold.
I	Changes the selected text to Italics.
U	Underlies the selected text.
~~S~~	Applies single-line strikethrough formatting to the selected text.
*T*x	Removes the text formatting from the selected text.

Editing an Article

To edit an article:

1. Select **Multimedia Rules > Article Library** from the Multimedia Provisioning menu.
2. On the Articles page, click the name of a listed article.
3. On the View Article page, click the **Edit** button.
4. On the Edit Article page, make the necessary changes in the article and then click **Save**.

Deleting an Article

To delete an article:

1. Select **Multimedia Rules > Article Library** from the Multimedia Provisioning menu.
2. On the **Articles** page, click the **Delete** link for the article you want to delete.
3. In the confirmation dialog box, click **OK**.

Process Guides

Process guides are used for agent training purposes and to help improve the communication skills of the agent.

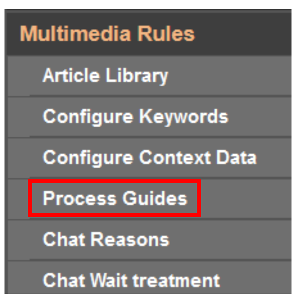
Topics covered in this section:

- Creating a Process Guide
- Editing a Process Article
- Deleting a Process Article

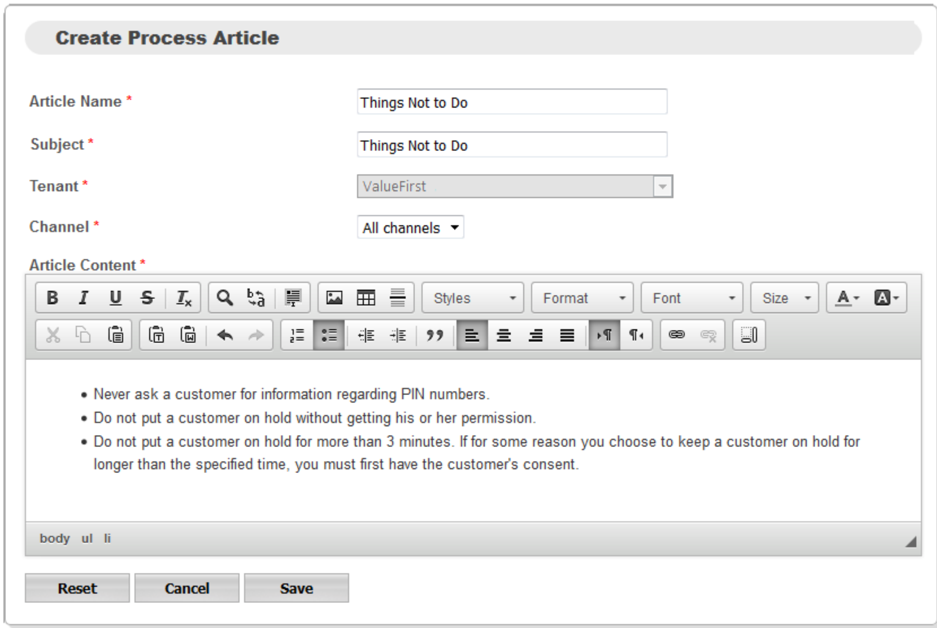
Creating a Process Guide

To create a new process guide:

1. Select **Multimedia Rules > Process Guides** from the Multimedia Provisioning menu.



2. On the **Process Articles** page, click **Create** on the upper-right side of the page.
3. Specify the settings and content for the process guide as described in the following table and then click **Save**.



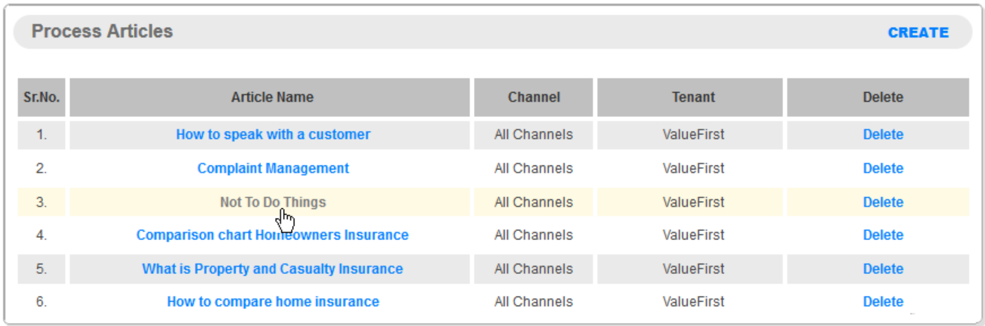
Field	Description
Article Name	Enter a name for the process article.
Subject	Enter the subject of the article.
Tenant	Select the appropriate entry point from the drop-down list. **Note**: After you select a tenant, this field is disabled.
Channel	Select the channel that this article will belong to.
Content	Enter content that explains the process in detail.

Editing a Process Article

Note: The tenant and channel specified for the article cannot be changed.

To edit a process template:

1. Select **Multimedia Rules > Process Guides** from the Multimedia Provisioning menu.
2. On the **Process Articles** page, click the name of the appropriate article in the **Article Name** column.



Process Articles CREATE

Sr.No.	Article Name	Channel	Tenant	Delete
1.	How to speak with a customer	All Channels	ValueFirst	Delete
2.	Complaint Management	All Channels	ValueFirst	Delete
3.	Not To Do Things	All Channels	ValueFirst	Delete
4.	Comparison chart Homeowners Insurance	All Channels	ValueFirst	Delete
5.	What is Property and Casualty Insurance	All Channels	ValueFirst	Delete
6.	How to compare home insurance	All Channels	ValueFirst	Delete

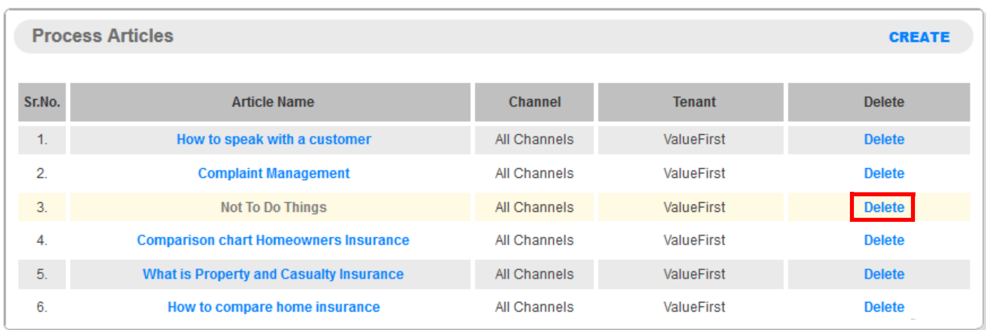
3. On the **View Process Article** page, click the **Edit** button.

4. Make the needed changes and then click **Save**.

Deleting a Process Article

To delete a process article:

1. Select **Multimedia Rules > Process Guides** from the Multimedia Provisioning menu.



Process Articles CREATE

Sr.No.	Article Name	Channel	Tenant	Delete
1.	How to speak with a customer	All Channels	ValueFirst	Delete
2.	Complaint Management	All Channels	ValueFirst	Delete
3.	Not To Do Things	All Channels	ValueFirst	Delete
4.	Comparison chart Homeowners Insurance	All Channels	ValueFirst	Delete
5.	What is Property and Casualty Insurance	All Channels	ValueFirst	Delete
6.	How to compare home insurance	All Channels	ValueFirst	Delete

2. On the **Process Articles** page, click the **Delete** link for the article you want to delete.

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

Email Accounts

Topics covered in this section:

- Creating, Editing, and Deleting Email Accounts
- Blacklisting Email

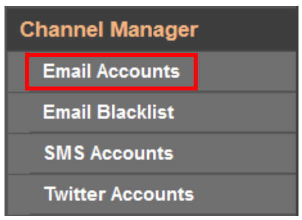
Creating, Editing, and Deleting Email Accounts

This section describes how to create, edit and delete email accounts that can be used for inbound and outbound communications and for sending out chat transcripts.

Before configuring the email account, ensure that the account has been configured on the Email exchange server and that the POP3/IMAP/SMTP servers are reachable from the Email Adapter server.

To create a new email account or to edit or delete an existing account:

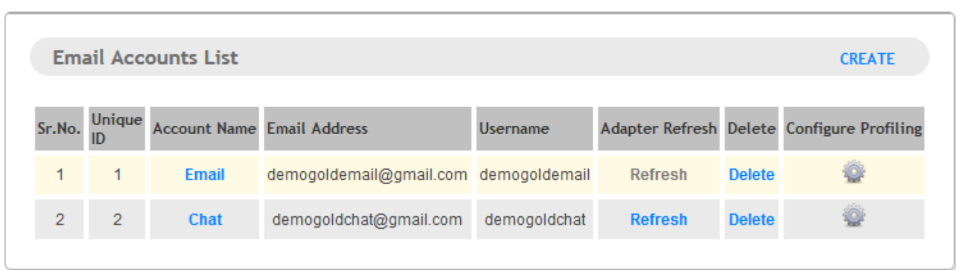
1. Select **Channel Manager > Email Accounts** from the Multimedia Provisioning menu.

   The page displays a list of existing email accounts.

2. On the Email Accounts List page, do one of the following:

   - To create a new email account, click the **Create** link on the upper-right side of the page to display the Create New Email Account page.
   - To edit an existing account, click a name of an email account listed in the **Account Name** column to display the Edit Email Account page.
   - To delete an email account, click the **Delete** link for the listed email account. Then, the confirmation dialog box, click **OK**.

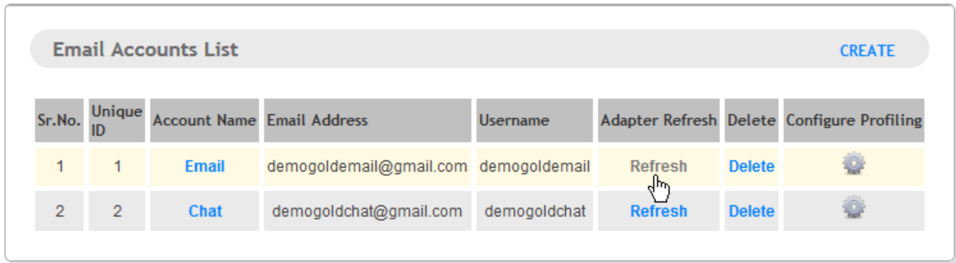


3. If you are creating or editing an email account, specify or change the settings for the account as described in the following table and then click **Save** (if you are creating a new account) or **Update** (if you are editing an existing account).

Field	Description
Tenant	Select the entry point for which this email account is being created.

Field	Description
Account Name	Enter the name of the email account.
Email Address	Enter the email address to be used for the email account.
Polling Enabled	Select this check box if you want the Email Adapter Server to start polling for incoming emails from the email account.
Incoming Protocol	Select the protocol to be used for receiving emails. POP3 and IMAP are supported.
Incoming Host	Enter the hostname of the server providing inbound email services.
Incoming Port Number	Enter the port number for polling incoming emails.
Username	Enter the username required for inbound authentication.
Password	Enter the password required for inbound authentication.
Confirm Password	Re-enter the password.
SMTP Server	Enter the hostname of the SMTP server.
Port Number	Enter the SMTP port number.
Inbound Encryption (AUTH Mechanism)	If the email server uses encryption for inbound polling, select the appropriate value from the drop-down list—SSL is preferred.
Mail Delay	Enter the time interval between 2 polling cycles to fetch emails.
Max messages per cycle	Enter the number of emails to be retrieved in each poll.
Outbound Encryption (AUTH Mechanism)	If the email server uses encryption for outbound communication, select the appropriate value from the drop-down list—SSL is preferred.
Enable Authentication	Select this check box if you want the Email Adapter to connect to SMTP using authentication.
Polling Retry Attempts	If polling is enabled, specify the number of times to retry polling attempts.
Polling Retry Interval	If polling is enabled, specify the number of seconds between polling attempts.
BCC Recipients	If you want a blind copy of all the outbound emails from this account sent to one or more email addresses, enter the email addresses separated by commas.
Outbound Enabled	Select this check box if this email address is used for sending outbound emails.
Server	Select the address (host name) of the appropriate email server from the drop-down list.
Parent Account	If aliases are used, select the parent email account for which the current email account is an alias.

4. After you click **Save** or **Update**, the Email Accounts List page appears. You must refresh the account so the Email Adapter reloads the settings for that email account. To do so, click the **Refresh** link for the new or updated email account.



When the email account has been successfully refreshed, the message "Server refreshed successfully" is displayed at the top of the Email Accounts List page.

Blacklisting Email

Blacklisting is an access control mechanism that rejects delivery of an email from a specified email address.

To block an email address from being delivered to an email account, you must:

- Add the email address to the Email Blacklist.
- Enable blacklist checking for the email account that you want to reject the email.

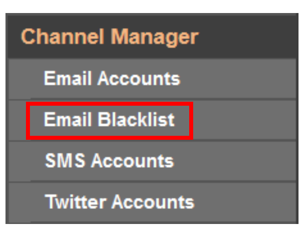
These actions are described in the following topics:

- Adding and Deleting Blacklisted Entries
- Enabling Blacklist Check for an Email Account

Adding and Deleting Blacklisted Entries

To add a blacklisted email address or to delete an existing one:

1. Select **Channel Manager > Email Blacklist** from the Multimedia Provisioning menu.



The Black Listed Entries page appears, displaying a list of existing blacklisted email addresses.

2. To delete a blacklisted email address, click the **Delete** link for the email address. and in the dialog box that appears, click **OK**.

3. To add a black listed entry:

   a. Click the **Add** button on the upper-right side of the page.

   b. Enter the email address in the **Black Listed Entry** field and click the **Add** button.

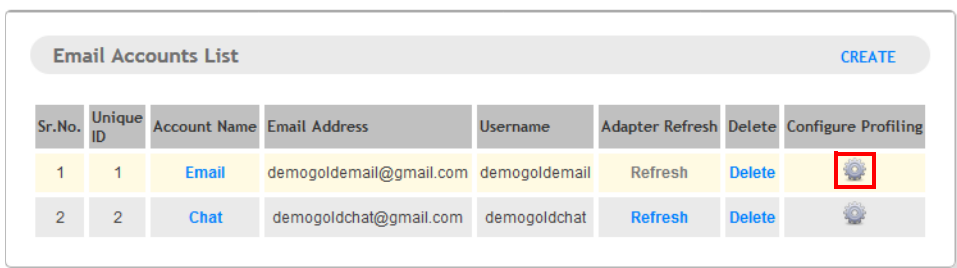
4. To block the blacklisted email from being delivered to an email account, you must enable a blacklist check for that email account as described in the next topic.

Enabling Blacklist Check for an Email Account

To enable a blacklist check for an email account:

1. Select **Channel Manager > Email Accounts** from the Multimedia Provisioning menu.

2. On the Email Accounts List page, click the **Settings** button to the right of a listed email account.



3. In the dialog box that appears, select the **Blacklist Check Enabled** check box and then click **Save**.

4. After you click **Save**, the Email Accounts List page appears. You must refresh the account so the Email Adapter reloads the settings for the email account. To do so, click the **Refresh** link for the email account.

Rule Groups and Routing Rules

A Rule Group is a group of routing rules that will be executed for inbound and outbound contacts if configured. Rule groups provide intelligent routing of contacts to the appropriate queue/agent/supervisor for enhancing contact handling.

Only one rule group can be created per tenant (entry point).

Three kinds of rule groups can be created: New Inbound Contact, Existing Inbound Contact, and Outbound Contact.

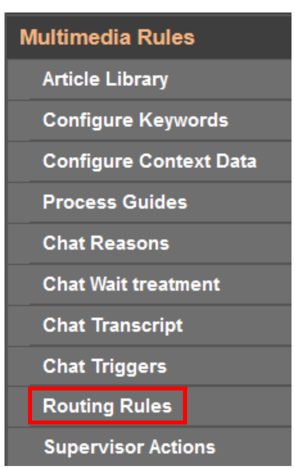
Topics covered in this section:

- Creating a Rule Group for New Inbound Contact
- Creating Rules
- Creating a Rule Group for Existing Inbound Contact
- Creating a Rule Group for an Outbound Contact
- Editing a Rule Group
- Deleting a Rule Group
- Editing Routing Rules
- Deleting or Changing the Order of Routing Rules

Creating a Rule Group for New Inbound Contact

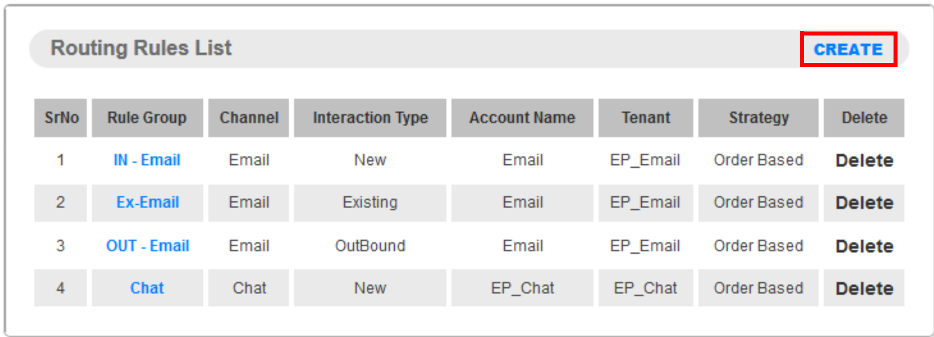
To create a rule group for a new inbound contact:

1. Select **Multimedia Rules > Routing Rules** from the Multimedia Provisioning menu.



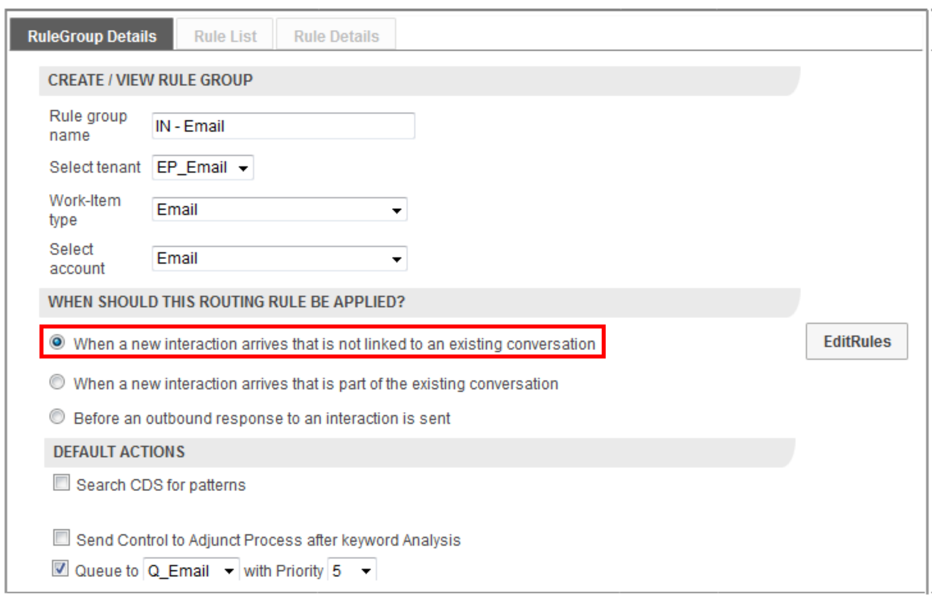
The page displays a list of existing routing rules.

2. Click the **Create** link on the upper-right side of the page.



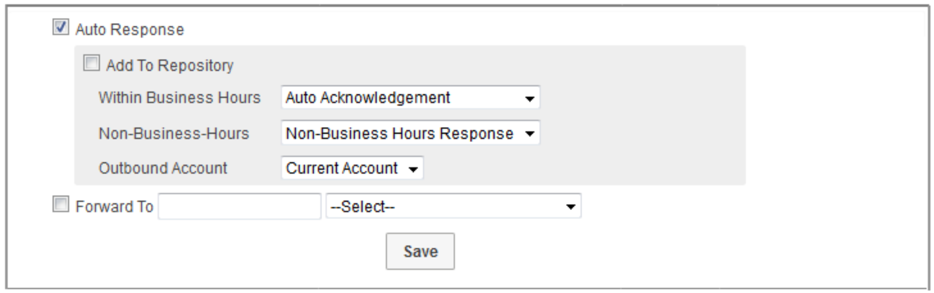
3. In the **Create/View Rule Group** section of the Rule Group Details page, specify a name for the rule group and select the tenant (entry point), the work-item type (channel), and the email account to be used for the rule group.

4. To configure rules and rule groups for new inbound contacts, select "**When a new interaction arrives that is not linked to an existing conversation**" as shown in the following illustration.



5. To send the contact to a default queue when none of the rules apply, select the **Queue to** check box under **Default Actions** and then select the default queue from the drop-down list. Change the priority if you wish. The priority 5 indicates that the contact should be sent to the queue with **Medium Priority**.

6. If an automatic response should be sent to the new incoming contacts, select the **Auto Response** check box to display additional settings, and then select the **Within Business Hours** article and the **Non-Business Hours** article and the Outbound Email Account to be used for sending the auto response.

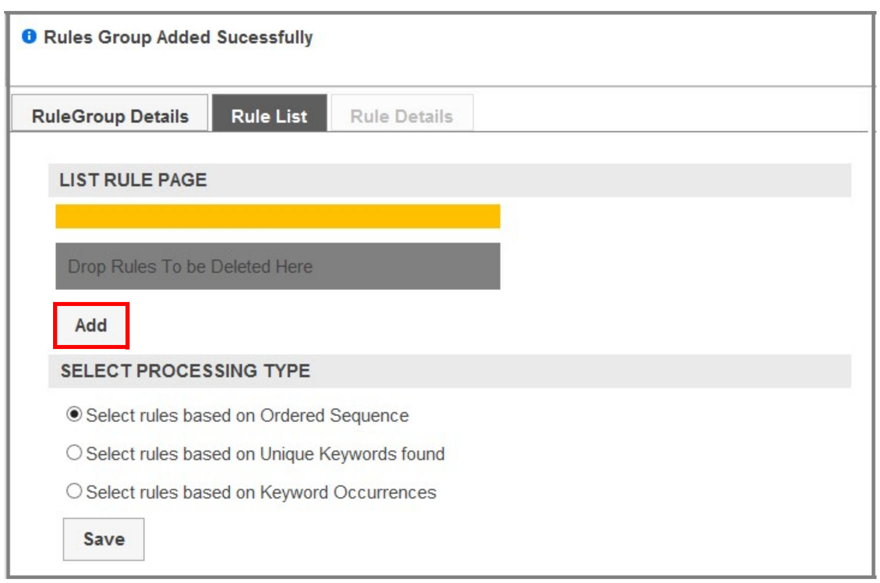


7. Click **Save** to save the rule group.

Creating Rules

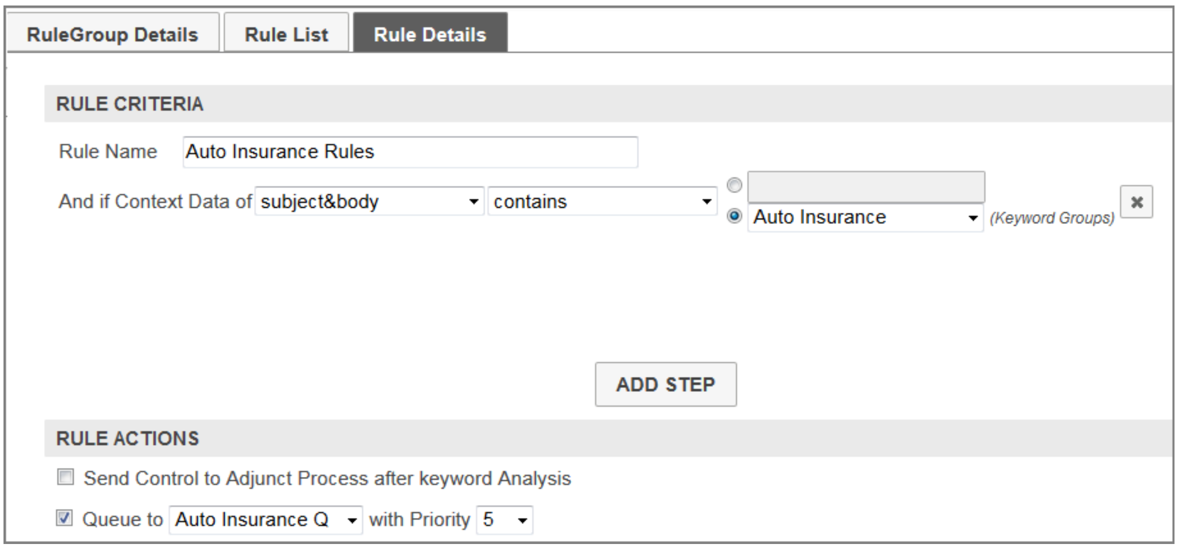
After you save the rule group, the Rule List tab opens where you can create rules:

1. On the Rules List page, select one of the options:
   - **Select rules based on Ordered Sequence:** The rules will be checked in the order as specified and if a rule matches, it will be executed, skipping the rest of the rules.
   - **Select rules based on Unique Keywords found:** The number of unique keyword matches will be counted for each rule and the rule for which the most unique keywords are found will be executed.
   - **Select rules based on Keyword Occurrences**. The number of keyword matches will be counted for each rule and the rule for which the most keywords are found will be executed.
2. Click **Add** to open the Rule Details tab where you can add a new rule to the rule group.



3. On the Rule Details tab:
   a. Enter a name in the **Rule Name** field.
   b. From the **And if Context Data of** drop-down list, select a CDU field.
   c. Select an operator from the second drop-down list.
   d. From the **Keyword Group** drop-down list, select the appropriate keyword group.

   In the following example, **subject&body** is selected in the CDU field, **contains** is the operator, and the Keyword Group is the previously created **Auto Insurance**. This rule will apply if the subject or body of an email contains any of the words from the selected keyword group.



4. Select the action or actions to be performed when the rule is executed. In the previous example, the contact has been queued to the Auto Insurance Q with a Medium Priority (above 5).

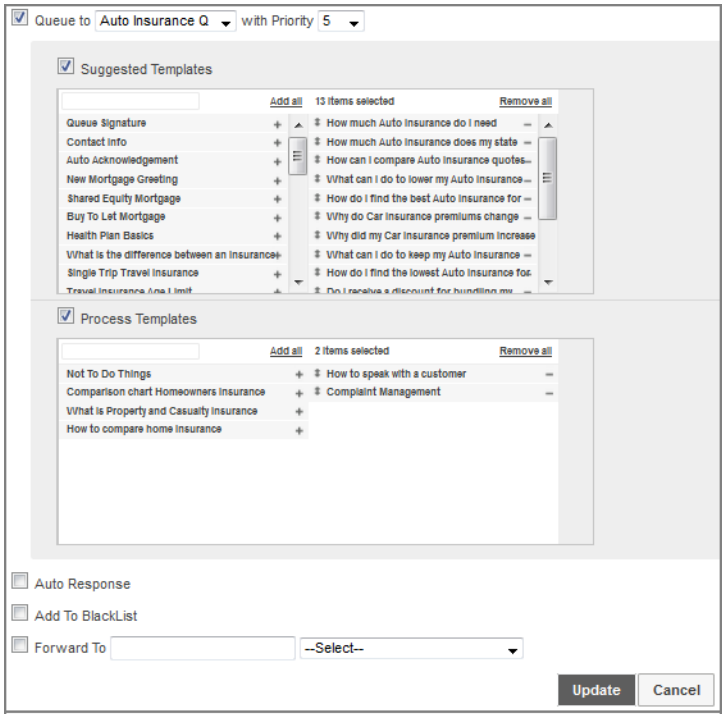
   Note: Alternatively, you can specify a keyword to be searched for in the text box above the Keyword Group drop-down list. This option is preferable in case only a single keyword is to be searched, without the need to create a keyword group.

5. To add suggested templates (articles):
   a. Select the **Suggested Templates** check box to display a list of all the articles created for the current tenant as well as All Tenants and the current channel as well as All channels.
   b. Click the + sign next to an article to add it as a suggested response.

6. To add a process template (article):

   a. Select the **Process Templates** check box to display a list of all the process guides created for the current tenant as well as all tenants, and current channels as well as All Channels.

   b. Click the plus sign **+** next to a process template to add it as a suggested process template.



7. Click **Save** to save the rule to the rule group. The Rule List tab opens and you can add more rules if necessary.

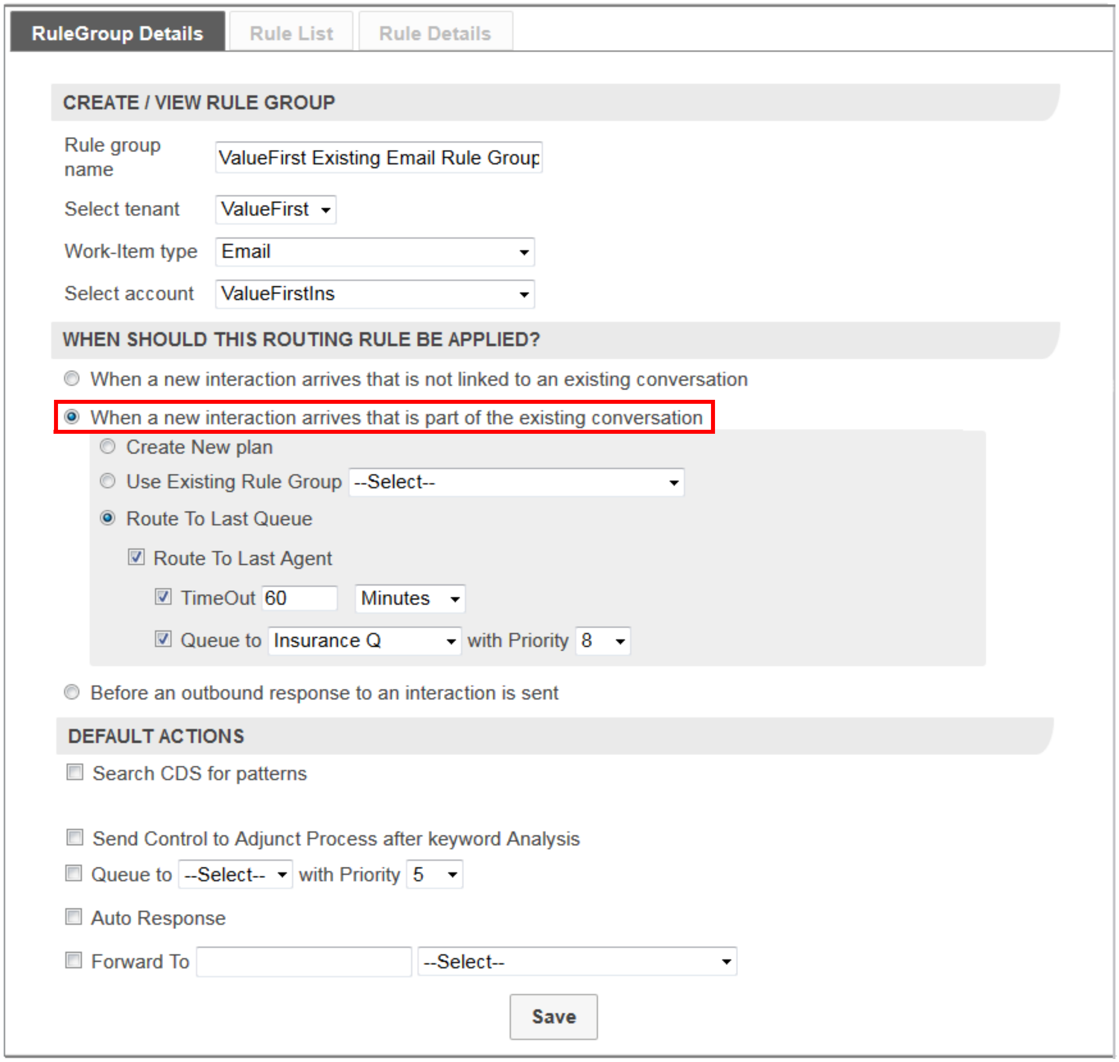
Creating a Rule Group for Existing Inbound Contact

In case of an email, if a customer replies to an email received from the contact center, that email is considered part of an existing conversation.

To create a rule group for handling such contacts, an existing rule group can be used to create a rule group. The new rule group thus created will contain the same rules as its parent rule group.

Alternatively, a new rule group with different rules can be created for emails that are a part of an existing conversation or the contact can simply be routed to the Last Agent/ Last Queue to which the contact was previously routed.

1. Select **Multimedia Rules > Routing Rules** from the Multimedia Provisioning menu and on the upper-right side of the Routing Rules List page, click the **Create** link.
2. In the **Create/View Rule Group** section of the Rule Group Details page, specify a name for the rule group, and select the tenant (entry point), work-item type (channel), and email account to be used for the rule group.
3. Select **When a new interaction arrives that is part of an existing conversation**.
4. To route the contact to the last queue and last agent, select: **Route to Last Queue** and then do the following:
    a. Select the **Route to Last Agent** check box.
    b. To set a timeout to search for another agent in the same queue if the last agent is not available within the timeout, enter a value in the **TimeOut** field and select a time period (**Days**, **Hours**, **Minutes**, or **Seconds**) from the drop-down list.
    c. You can also select a default queue in case the last queue is not found. To do so, select a queue from the drop-down list and specify a priority.



5. Click **Save** to save the rule group.

Creating a Rule Group for an Outbound Contact

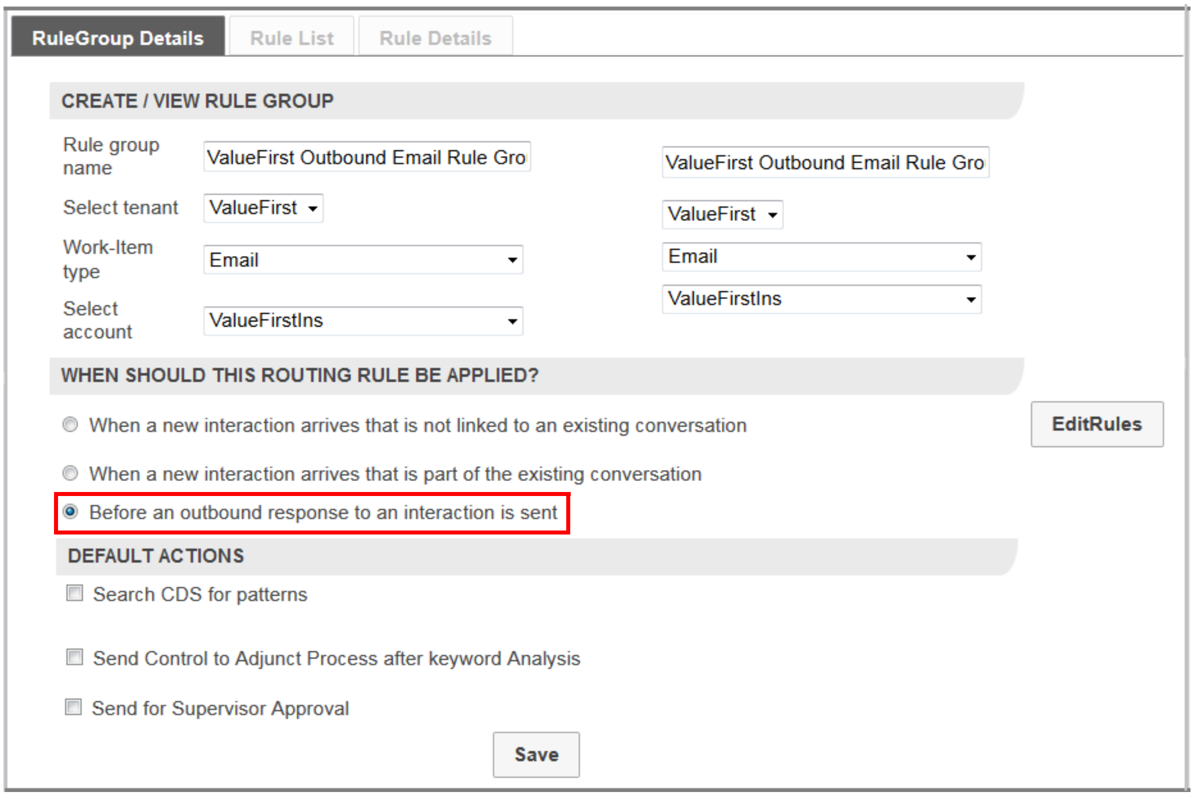
An outbound rule group must be configured in order to send an outbound contact. Rules are not necessarily needed in this rule group.

To create a rule group for an outbound contact:

1. Select **Multimedia Rules > Routing Rules** from the Multimedia Provisioning menu and on the upper-right side of the Routing Rules List page, click **Create**.

2. In the **Create/View Rule Group** section of the Rule Group Details page, specify a name for the rule group, and select the tenant (entry point), work-item type (channel), and email account to be used for the rule group.

3. Select **Before an outbound response to an interaction is sent**.

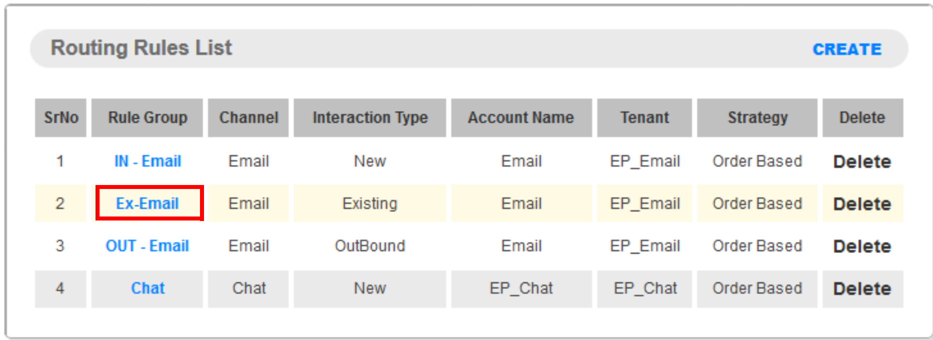


4. Rules can be created for outbound contacts if necessary. The options for Outbound Rules are:
   - Send Control to Adjunct Process after keyword Analysis
   - Send for Supervisor Approval (see "Enabling Supervisor Approval Through Outbound Rule" on page 374).
5. Click **Save** to save the rule group.

Editing a Rule Group

To edit a rule group:

1. Select **Multimedia Rules > Routing Rules** from the Multimedia Provisioning menu.
2. On the Routing Rules List page, click the rule group name.



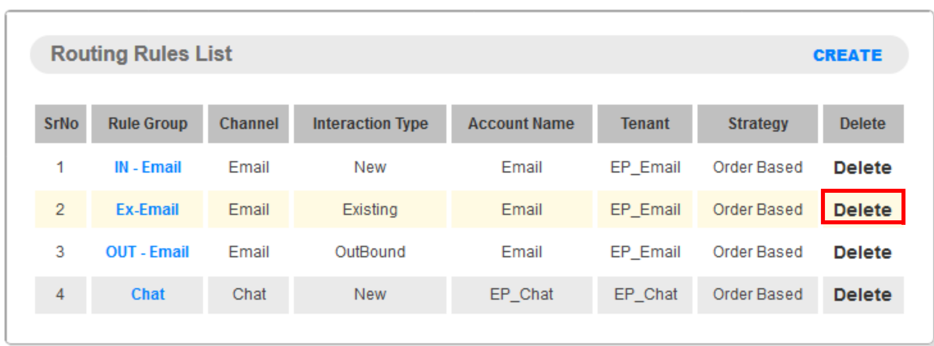
3. Make the necessary changes and then click **Update**.

Deleting a Rule Group

To delete a rule group:

1. Select **Multimedia Rules > Routing Rules** from the Multimedia Provisioning menu.

2. On the Routing Rules List page, click the **Delete** link for the listed rule group you want to delete.



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

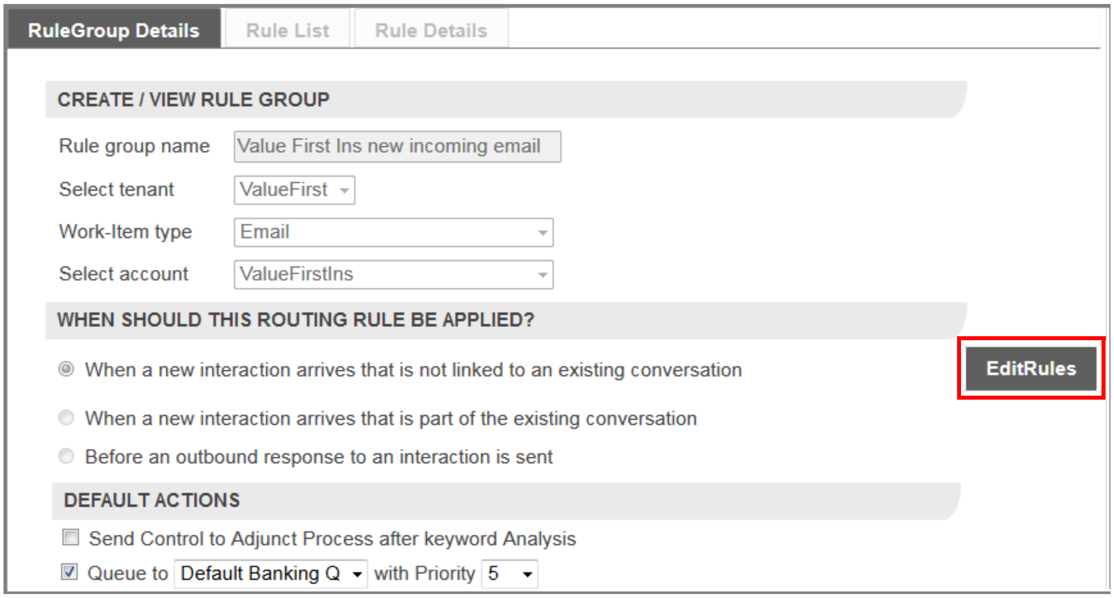
Editing Routing Rules

To edit an existing rule in a rule group:

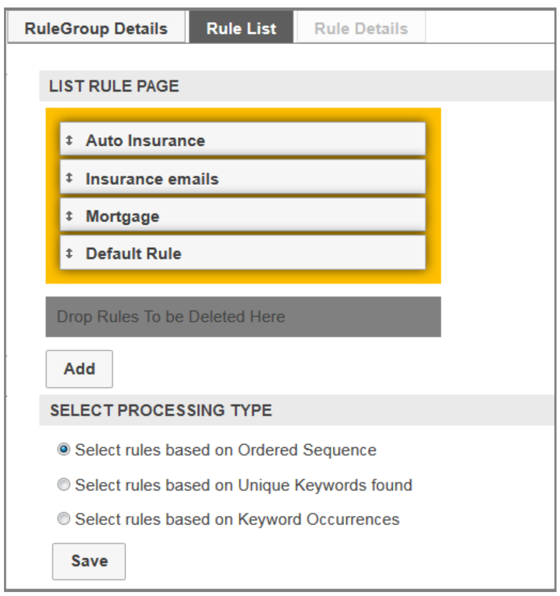
1. Select **Multimedia Rules > Routing Rules** from the Multimedia Provisioning menu.

2. On the Routing Rules List page, click the rule group name.

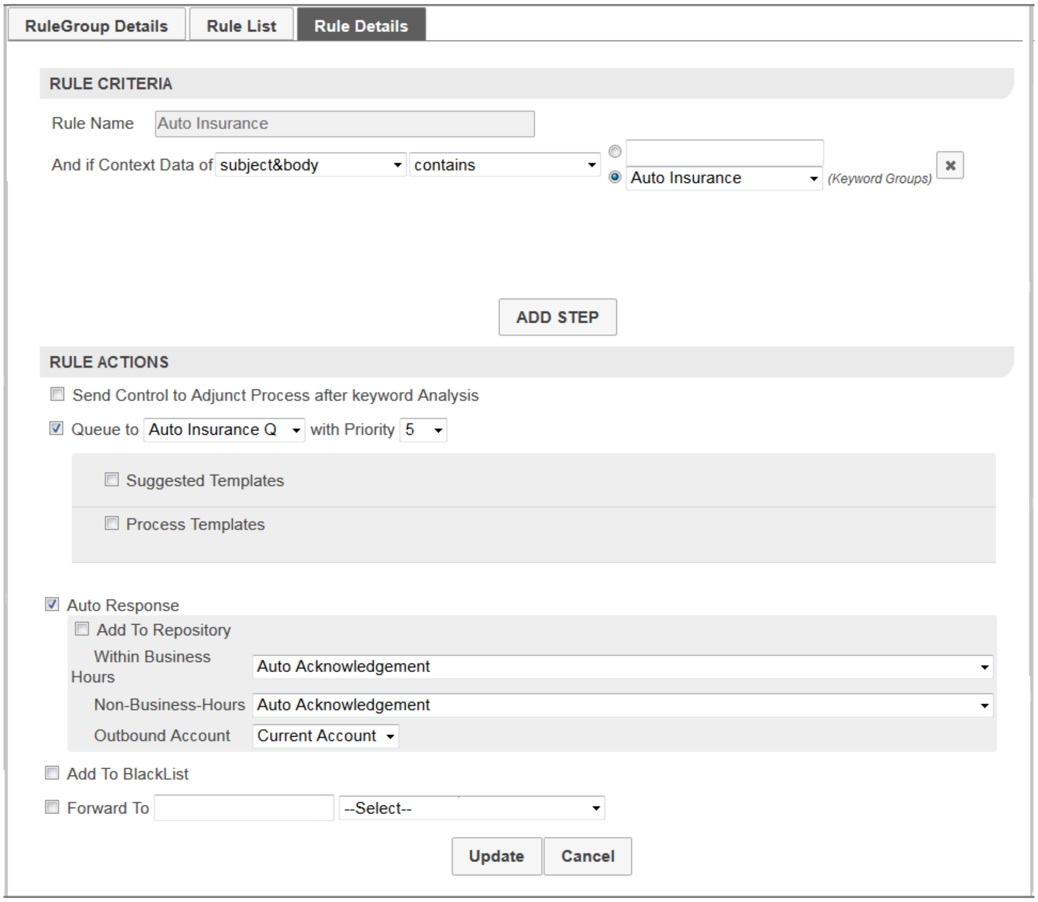
3. On the Rule Group Details page, click the **EditRules** button to edit the rules for the selected rule group.



4. On the Rule List page, double-click the rule you want to edit.



5. On the Rule Details page, make the changes you want and then click **Update** to save the rule to the rule group. For more information about the settings, see "Creating Rules" beginning on page 360.



6. Click **Update** to save the rule to the rule group. After you click **Update**, the Rule List page appears.
7. On the Rule List page, click **Save**.
8. Refresh the Routing Manager server for the rule to take effect: navigate to **Manage Servers > Service Controller** and click the **Update** button corresponding to the server that needs to be updated.

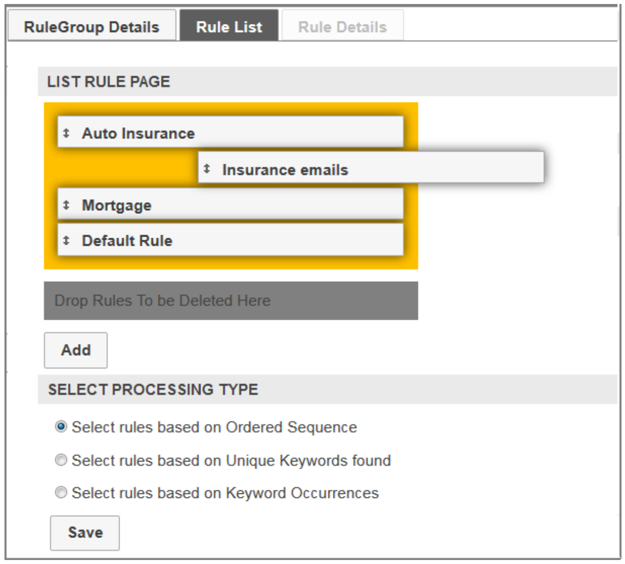
Deleting or Changing the Order of Routing Rules

To delete a routing rule or to change the order in which rules are executed within a rule group:

1. Select **Multimedia Rules > Routing Rules** from the Multimedia Provisioning menu.
2. On the Routing Rules List page, click the rule group name.
3. On the Rule Group Details page, click the **EditRules** button.

4. The rules displayed on the Rule List page can be dragged and moved:

    - To delete a rule, drop it into the grey **Drop Rules to be deleted here** box.
    - To change the order in which rules are executed within the rule group, drag and drop a rule to a different position.



5. Click **Save** to save the rule group changes.

Supervisor Approval

An email can be automatically sent to a supervisor for approval before being sent to the customer. Supervisor approval can be configured at the queue or the agent level based on a specified Percent Approval setting.

For example, if 50 percent is set at the queue level, then 50 percent of the emails arriving at the queue will be sent for supervisor approval. If the percentage approval is set at the agent level, the value set at the queue level is overridden.

In addition, supervisor approval can be configured through an outbound rule that checks for restricted keywords in an outbound email and if found, queues the contact for supervisor approval.

Topics covered in this section:

- Configuring Percentage Approval
- Enabling Supervisor Approval Through Outbound Rule

Configuring Percentage Approval

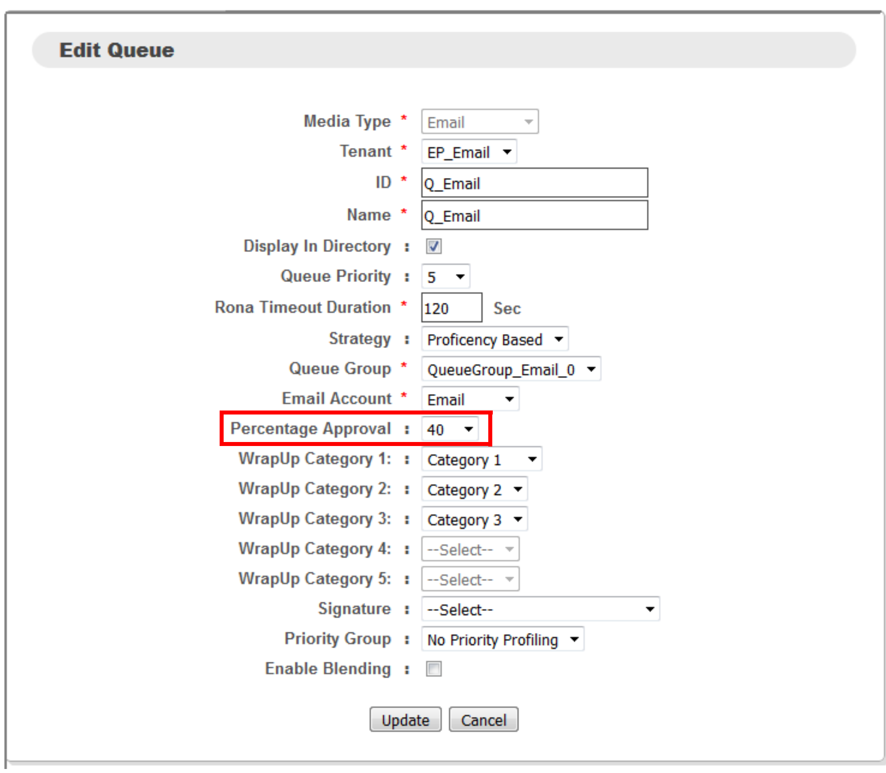
Percentage approval defines the percentage of emails that need to be sent to the supervisor for approval. The percentage can be set at the queue or agent level as described in the following topics:

- Setting Percentage Approval at the Queue Level
- Setting Percentage Approval at the Agent Level

Setting Percentage Approval at the Queue Level

To set the percentage at the Queue level:

1. Select **Manage Queues > Agent Queue Mapping** from the Multimedia Provisioning menu.
2. On the Queues page, click the name of a queue listed in the Name column to display the Edit Queue page.
3. On the Edit Queue page, select the appropriate percentage from the **Percentage Approval** drop-down list. In the following example, 40% is selected, meaning that 40% of the emails will be sent for supervisor approval.



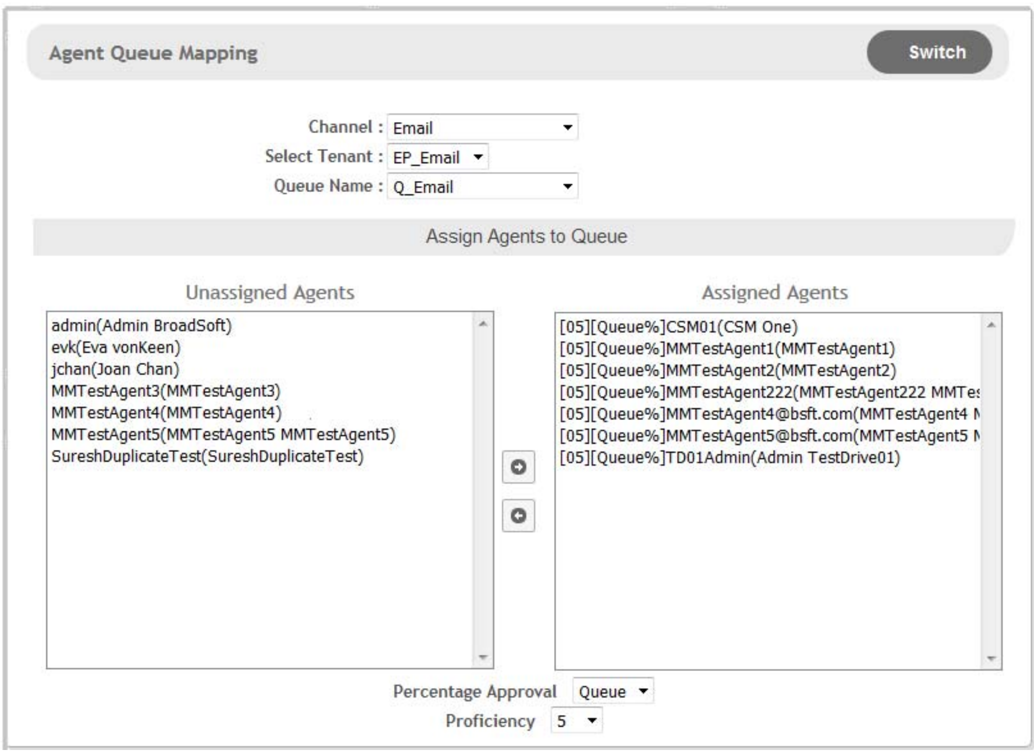
Setting Percentage Approval at the Agent Level

To set the percentage at the Agent level:

1. Select **Manage Queues > Agent Queue Mapping** from the Multimedia Provisioning menu.

2. Select the Tenant, Channel and Queue for which the percentage needs to be configured.

   The following illustration shows a list of available agents on the left and a list of agents already assigned to the selected queue.

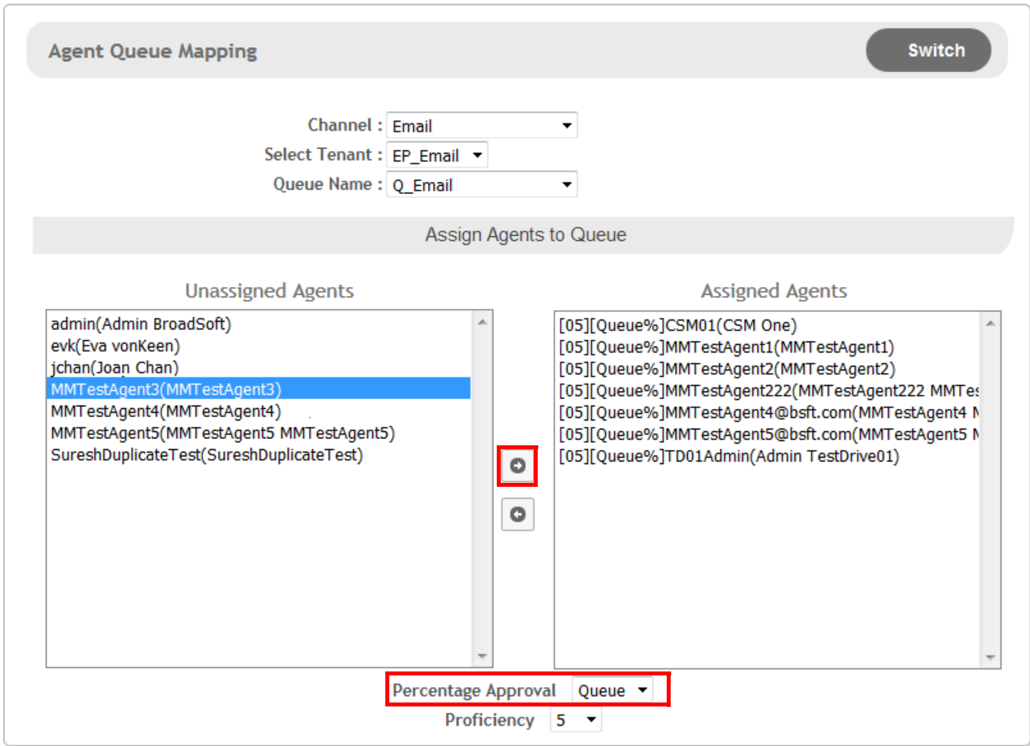


3. To set the Percentage Approval at the queue level for the agent:

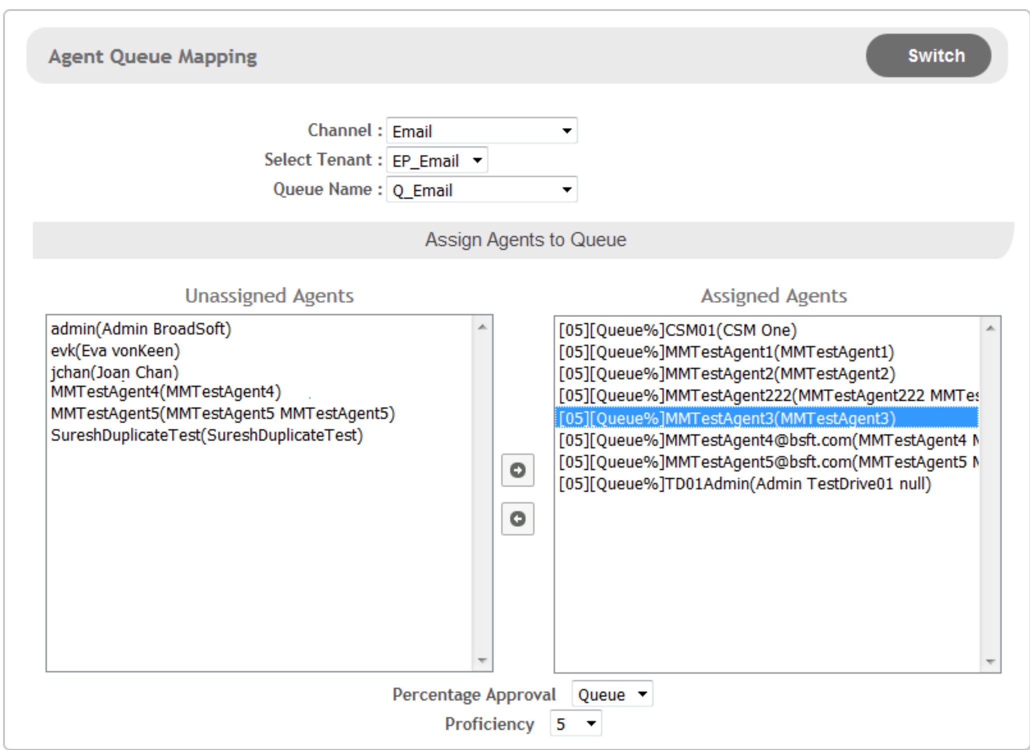
   a. Select the agent for whom the percentage needs to be set.

   b. Set the **Percentage Approval** field to **Queue** to assign the queue percentage approval to the agent. This means that if 40% is set at the queue level, the same percentage will be applied to the selected agent. Hence, 40% of the emails arriving for the agent will be sent for approval.

   c. Click the right-arrow  button to assign the agent to the queue with the specified percentage.



4. The agent will be assigned the queue percentage as shown next.

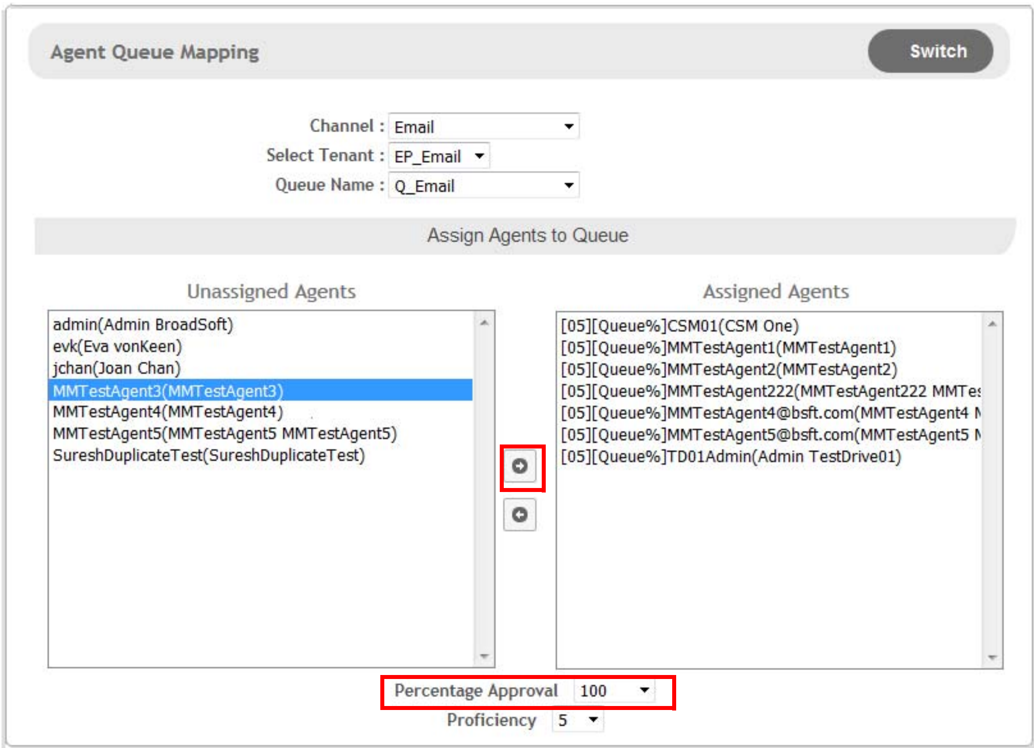


5. To assign a specific percentage to an agent:

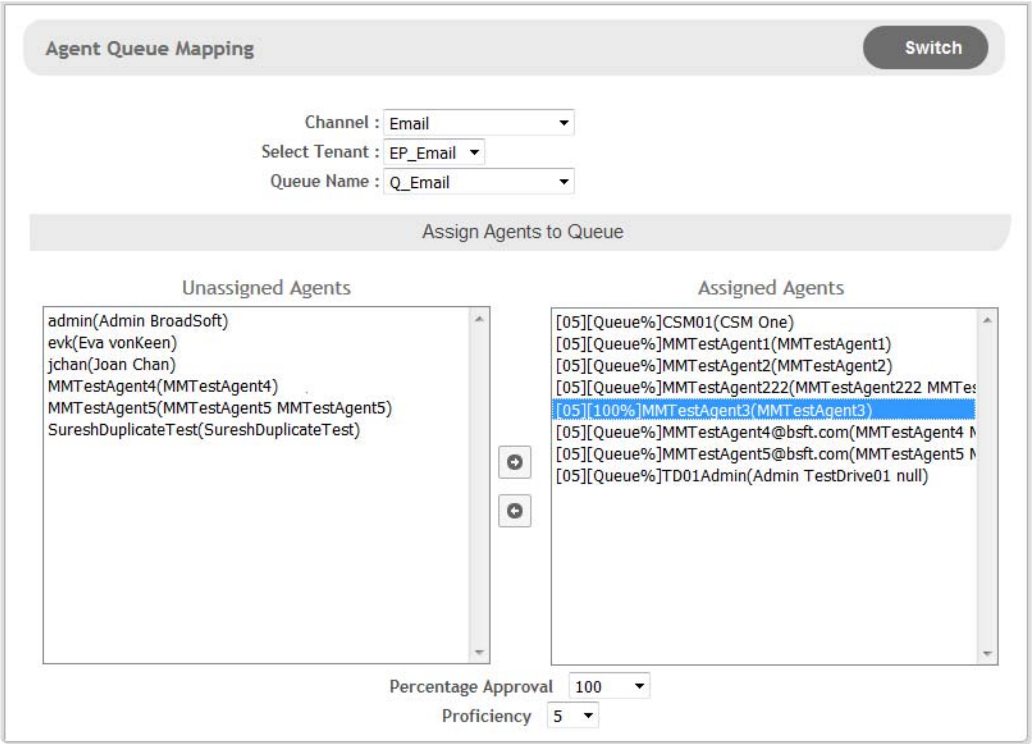
   a. Select the agent.

   b. Select the percentage from the **Percentage Approval** drop-down list. In the following example, 100% is selected for the agent, indicating that all of the emails arriving at the agent will be sent for approval.

   c. Click the right-arrow button to assign the agent to the queue with the specified percentage.



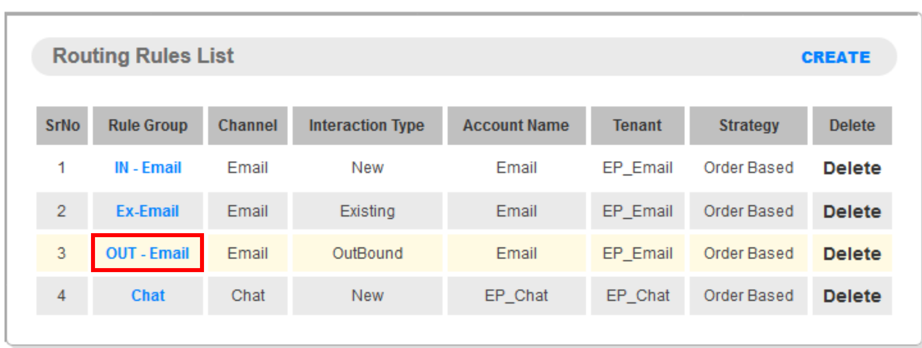
The agent is now listed on the Assigned Agents list with the percentage approval (100% in this example).



Enabling Supervisor Approval Through Outbound Rule

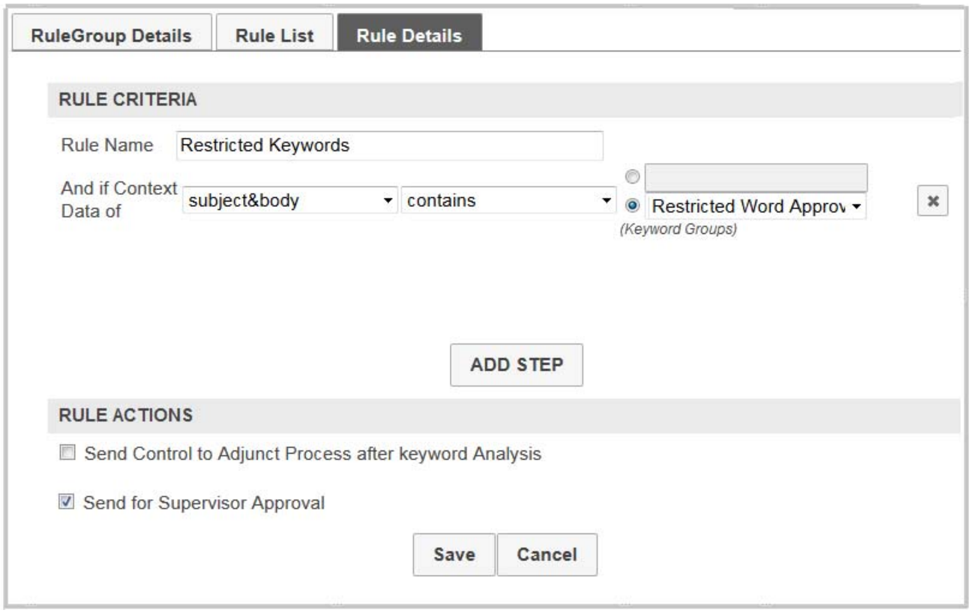
To configure a rule to check for restricted keywords in an outbound email and if found, queue the contact for supervisor approval:

1. Create a keyword group containing restricted keywords (see "Key Words" on page 341).
2. Navigate to **Multimedia Rules > Routing Rules** and click the name of the outbound email rule group.



3. On the Rule Group Details page, click the **EditRules** button.
4. On the Rule List page, click the **Add** button to add a new rule.

5. On the Rule Details page, create a rule that looks for keywords in the email subject and body and queues the email for supervisor approval as shown in the following illustration.



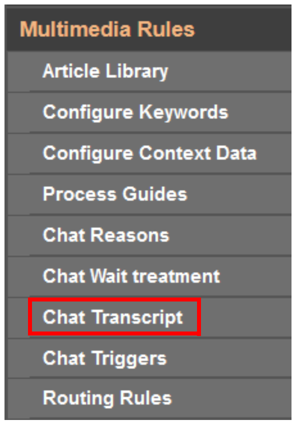
6. Click **Save** to save the rule.

7. Refresh the Routing Manager server for the rule to take effect: navigate to **Manage Servers > Service Controller** and click the **Update** button corresponding to the server that needs to be updated.

Chat Transcript Templates

To create, edit, or delete a chat transcript:

1. Select **Multimedia Rules > Chat Transcript** from the Multimedia Provisioning menu.



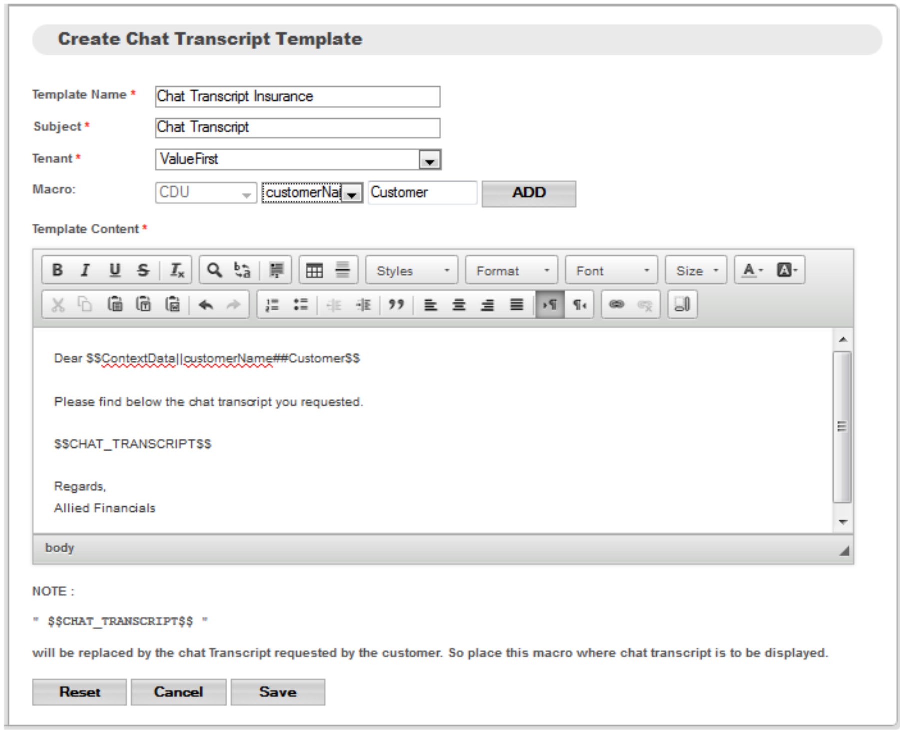
2. On the **Chat Transcript Templates** page that appears, do one of the following:

   - To create a new template, click the **Create** link on the upper right side of the page to display the Create Chat Transcript page.

   - To edit a template, click the name of a template listed in the Template Name column, and on the View page that appears, click the **Edit** button.

   - To delete a template, click the **Delete** link for the template you want to delete. Then in the confirmation dialog box, click **OK**.

3. If you are creating or editing a chat transcript template, specify or change the settings for the template as described in the table following the next illustration and then click **Save**.



Field	Description
Template Name	Enter a name for the template.
Subject	Enter the subject of the template.
Tenant	Select the appropriate entry point from the drop-down list.
Macro	Macros are replaceable codes in a template that can be substituted with values from the CDU (see "Using Macros in an Article" on page 346 for more information).
Template Content	Enter the content of the template. **Note**: The macro $$CHAT_TRANSCRIPT$$ is used as a placeholder that will be replaced by the chat transcript requested by the customer, so place this macro where the chat transcript is to be displayed.

Chat Wait Treatments

You need at least one wait treatment to keep the chat requestor engaged while the system is assigning the work to an agent. Wait treatments are collections of messages to be displayed to chat customers during their wait time. You should be able to create a contextual wait treatment corresponding to every chat reason.

Topics covered in this section:

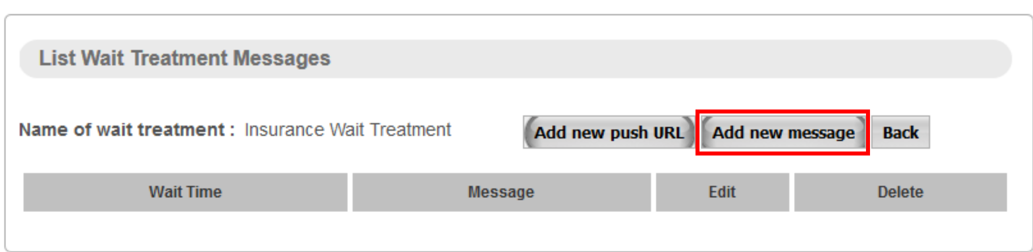
- Creating a Wait Treatment
- Editing or Deleting a Wait Treatment

Creating a Wait Treatment

To create, edit, or delete a chat wait treatment:

1. Select **Multimedia Rules > Chat Wait treatment** from the Multimedia Provisioning menu.

2. On the Wait Treatment page that appears, click the **Create** link on the upper right side of the page.
3. On the Add Wait Treatment page, enter a name for the wait treatment and click **Save**. The List Wait Treatment Messages page appears.
4. To add a message to the wait treatment, click the **Add new message button**.

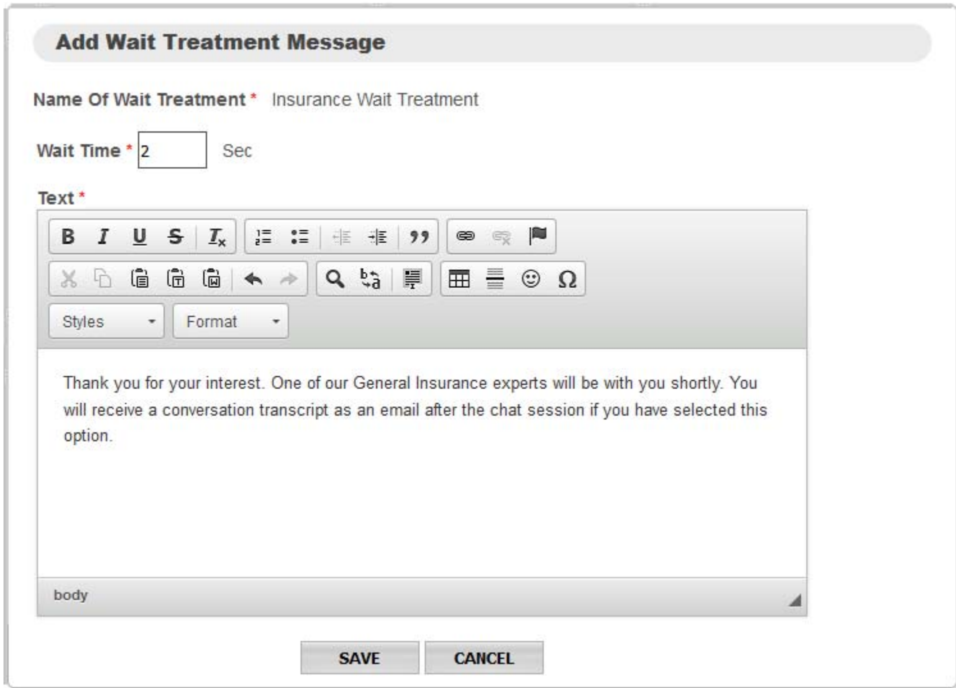


5. On the page that appears:

   a. Enter a value in the **Wait Time** field to specify in seconds how soon to display the wait message to the customer after the customer has initiated a chat and before an agent has responded.

   b. In the text area, enter the massage that will be displayed to the customer.

   c. Click **Save**.



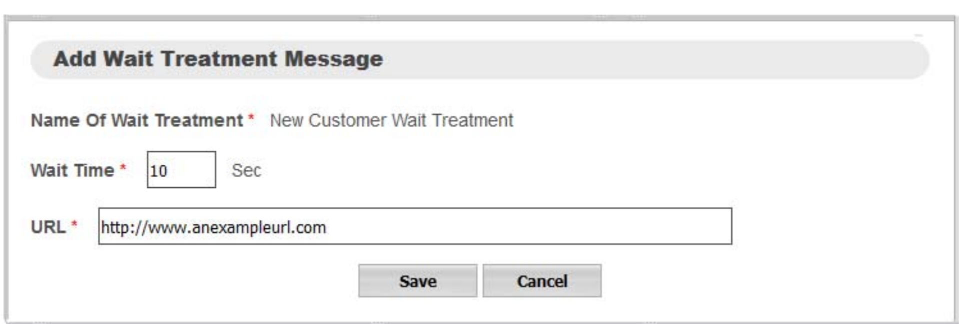
6. After you click **Save**, the List Wait Treatment Message page reappears.

7. To add a push URL to the wait treatment, click the **Add new push URL** button on the List Wait Treatment Message page and on the page that appears:

   a. Enter a value in the **Wait Time** field to specify in seconds how soon to load the URL to the customer's browser after the customer has initiated a chat and before an agent has responded.

   b. In the URL field, enter a URL that can be loaded to the customer's browser.

   c. Click **Save**.

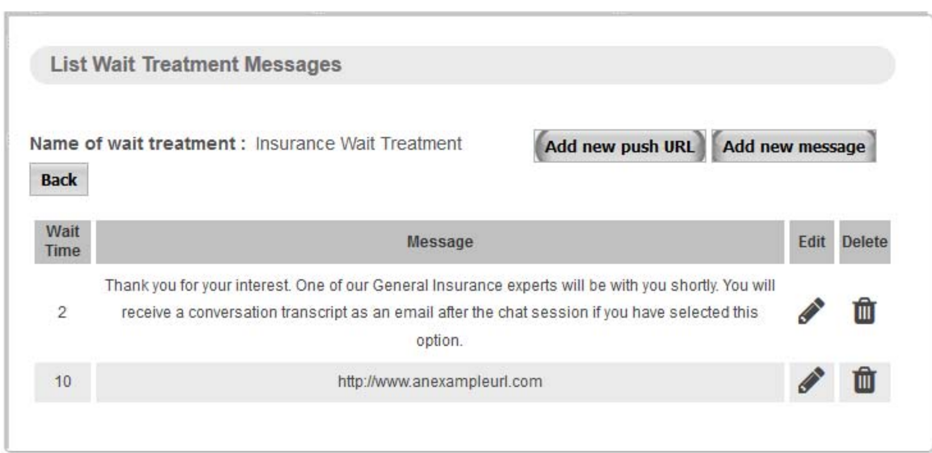


Editing or Deleting a Wait Treatment

To edit or delete a wait treatment or a wait treatment message or URL:

1. Select **Multimedia Rules > Chat Wait treatment** from the Multimedia Provisioning menu.
2. On the **Wait Treatment** page that appears, do one of the following:
   - To edit a wait treatment, click the link in the Wait Treatment column, and on the View page that appears, click the **Edit** button.
   - To delete a wait treatment, click the **Delete** link for the wait treatment you want to delete. Then in the confirmation dialog box, click **OK**.

3. On the List Wait Treatment Messages page:
   - Click the **Edit** button to edit an existing message or URL and on the page that appears, make your changes and then click **Save**.
   - Click the **Delete** button to delete a message or URL. Then in the confirmation dialog box, click **OK**.
   - Click the **Add new message** button to add a new message.
   - Click the **Add new push URL** button to add a new push URL.

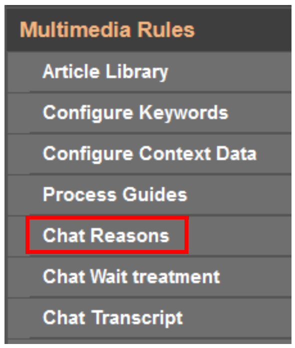


Chat Reasons

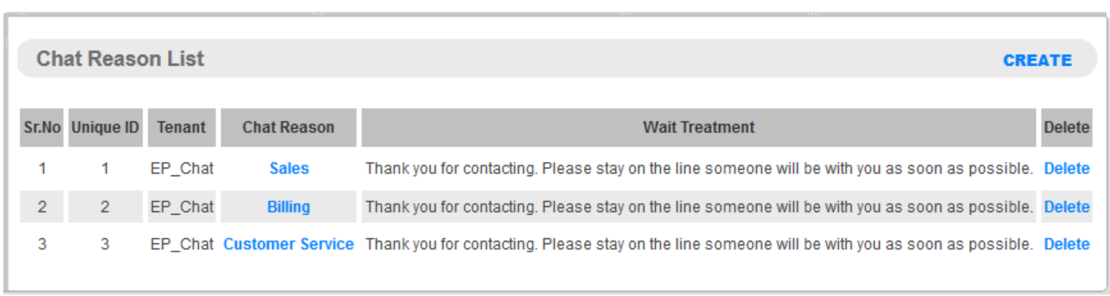
Chat reasons are customer-facing options for a Web site visitor to select before initiating a chat.

To create, edit, or delete a chat reason:

1. Select **Multimedia Rules > Chat Reasons** from the Multimedia Provisioning menu.

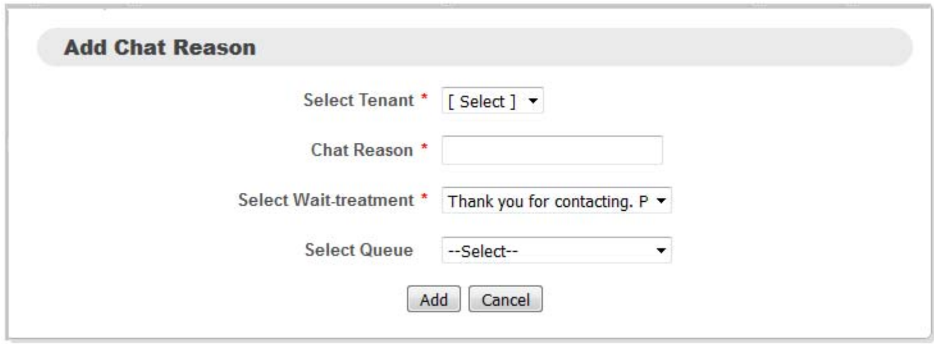


2. On the Chat Reason page that appears, do one of the following:
   - To create a new chat reason, click the **Create** link on the upper right side of the page to display the Create Chat Transcript page.
   - To edit a chat reason, click the name of a chat reason listed in the Chat Reason column to display the Edit Chat Reason page.
   - To delete a chat reason, click the **Delete** link for the chat reason. Then in the confirmation dialog box, click **OK**.



Sr.No	Unique ID	Tenant	Chat Reason	Wait Treatment	Delete
1	1	EP_Chat	Sales	Thank you for contacting. Please stay on the line someone will be with you as soon as possible.	Delete
2	2	EP_Chat	Billing	Thank you for contacting. Please stay on the line someone will be with you as soon as possible.	Delete
3	3	EP_Chat	Customer Service	Thank you for contacting. Please stay on the line someone will be with you as soon as possible.	Delete

3. If you are creating or editing a chat reason, specify or change the settings as described in the following table and then click **Add** (if you are adding a new chat reason) or **Update** (if you are editing an existing chat reason).



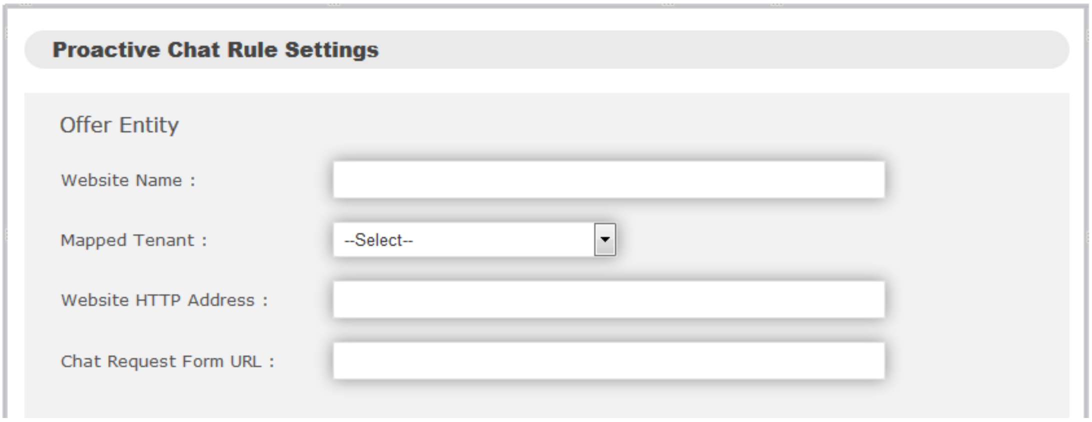
Field	Description
Select Tenant	Select an entry point from the drop-down list. This field cannot be changed.
Chat Reason	Enter a name for the chat reason. The name must not contain :, /, or ! characters. This field cannot be changed.
Select Wait treatment	Select a wait treatment from the drop-down list (see "Chat Wait Treatments" on page 378).
Select Queue	Optionally, select a queue if you need to access the #Staffed agents data (via Chat API) from the customer website before offering a live chat option. Use case: Offer a live chat only if agents are staffed in the selected queue.

Chat Triggers

Chat triggers are used to operatively offer web chat with live agents to visitors to your webbiest.

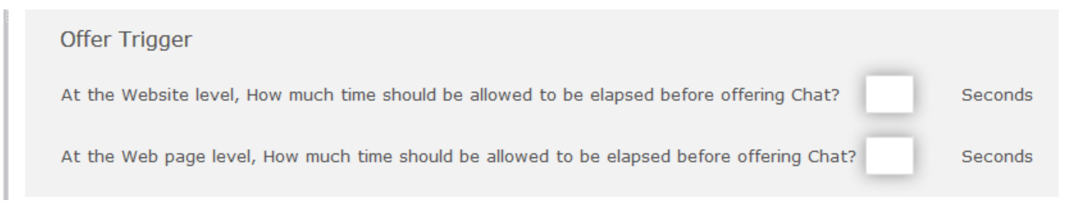
To create a chat trigger:

1. Select **Multimedia Rules > Chat Triggers** from the Multimedia Provisioning menu.
2. On the **Websites** page that appears, click the **Create** link on the upper right side of the page.
3. In the **Offer Entity** section of the page that appears, enter the website name, select the entry point from the **Mapped Tenant** drop-down list, and enter the website HTTP address and chat request form URL in the appropriate fields.

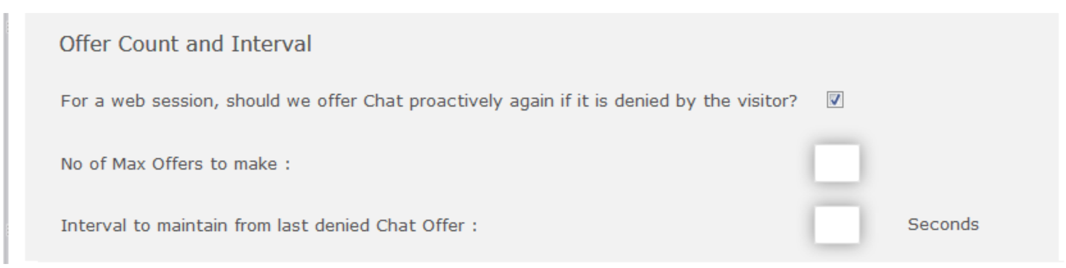


4. In the **Offer Hours** section of the page, select a calendar from the drop-down list if one is defined (see "Calendar" on page 384). If a calendar is selected, live chat will not be offered to website visitors on a holiday or during off hours.

5. In the **Offer Trigger** section, enter the number of seconds that should elapse before offering a chat at the website level and at the web page level.



6. In the **Offer Count and Interval** section, select the check box if you want a chat to be proactively offered again if it is denied by the visitor, and specify the maximum number of chat offers to make and the number of seconds that should elapse from the last denied chat offer.



7. In the **Offer Message** section, enter the messages to be displayed for a first visitor and a message to be displayed for a repeat visitor.

8. In the **Form Automation** section:

   a. Select a **Chat Reason Selection mode**:

      - **Allow User to Select:** If this option is selected, the proactive chat widget on the Web page will display a drop-down list of chat reasons that have been defined.
      - **URL Mapped**: If this option is selected, the Default Chat Reason will be sent from the proactive chat widget and the chat will be redirected to the appropriate queue.

   b. Select a **Default Chat Reason**.

9. In the **Others** section, select the check box if you want **Debug Mode**.

10. Click **Save** to save your settings.

Calendar

The **Manage Calendar** settings help in streamlining chat channel operations with options to define working hours and holidays for the agents. After creating a calendar, you must map it to a chat trigger.

The configured calendar is a combination of two things: the schedule of the working hours and a list of holidays. You can create multiple schedules and holiday groups and attach them to a calendar as required (which also means you can have multiple calendars sharing the same schedule or different schedules).

You must create a schedule (if none exist) and a holiday group (if none exist) before you can create a calendar to bring them all together:

Topics covered in this section:

- Creating a Schedule
- Creating a Holiday Group
- Creating a Calendar

Creating a Schedule

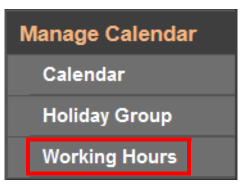
When you set up the working hours schedule, you have the following options:

- You can identify the non-working days of the week. This will be applied to every week of your Calendar. For example, if you select Sunday as your nonworking day, then every Sunday will be considered non-working.
- You can set different working hours for each working day or apply the same working hour to all working days.
- You can set up working hours as an uninterrupted block or split them up into blocks of working hours.

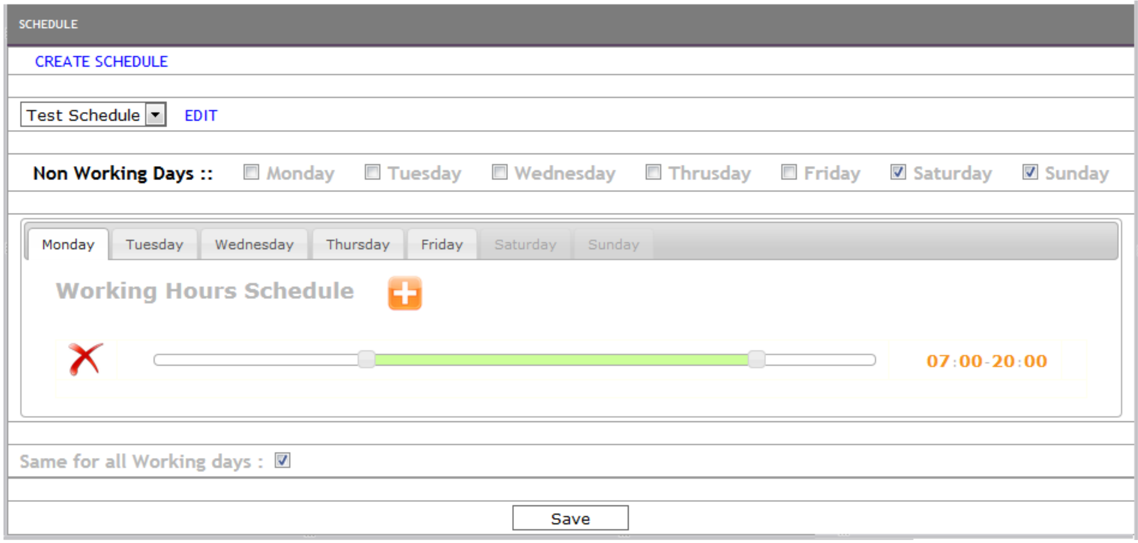
Note: Any break in the working hours will impact the distribution of your multimedia work items. For example, within a single day, if your working hours are from 8 am to 1 pm and then from 2 pm to 8 pm, then work items will not get assigned to the agents between 1 pm and 2 pm even if agents are available.

To create a schedule:

1. Select **Manage Calendar > Working Hours** from the Multimedia Provisioning menu.



2. On the Schedule page, click **CREATE SCHEDULE**, then enter a schedule name and description in the fields that appear and click **Save**.
3. Select your newly created schedule from the drop-down list.
4. Select the check box next to each non-working day of the week.
5. Click the plus sign on the tab for the first working day and then drag the timescale to define your working hours for that day. Repeat for each working day, or select the **Same for All Working Days** check box to set the selected timescale for all working days.
6. Click **Save** to save the schedule.



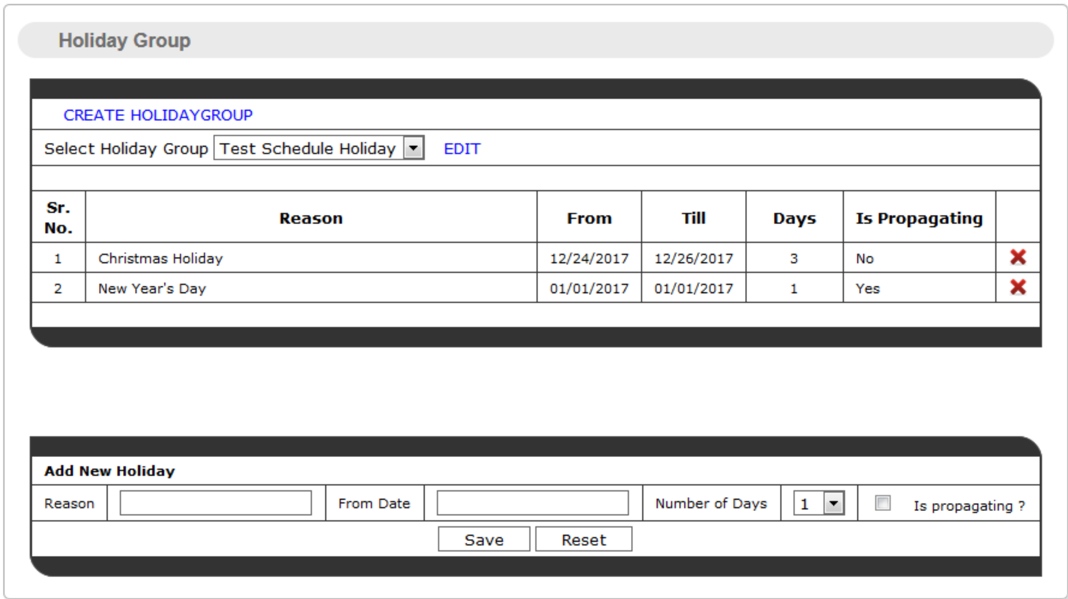
Creating a Holiday Group

To create a holiday group:

1. Select **Manage Calendar > Holiday Group** from the Multimedia Provisioning menu.
2. To create a new holiday group, click **CREATE HOLIDAYGROUP**.
3. In the settings that appear, enter a holiday group name and click **Save**.
4. To add holidays to this group, select the newly created holiday group from the drop-down list. If you select an existing holiday group, the page will display the list of holidays created previously.
5. In the **Add New Holiday** section, specify the settings for the holiday and then click **Save**.

Field	Description
Reason	Enter the name of the holiday.
From Date	Enter the date of the holiday
Number of Days	If the holiday is longer than one day, select the number of days from the drop-down list.
Is propagating	Select this option for a holiday that occurs on the same calendar date each year, so it is rolled over each year without requiring a manual intervention update. A holiday set without this option will be implemented only on the date specified.

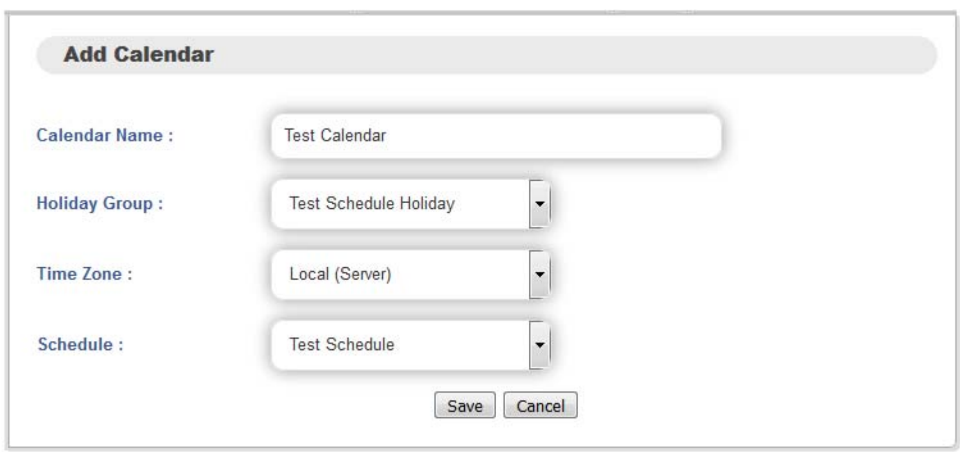
6. Repeat the previous step for each holiday you want to add to the group.



Creating a Calendar

After a schedule and holiday group have been created, you can create a calendar:

1. Select **Manage Calendar > Calendar** from the Multimedia Provisioning menu.
2. On the Calendar page that appears, click the **Create** link on the upper right side of the page.
3. On the Add Calendar page, specify a name for the calendar, select a holiday group, time zone, and schedule from the drop-down lists, and click **Save**.



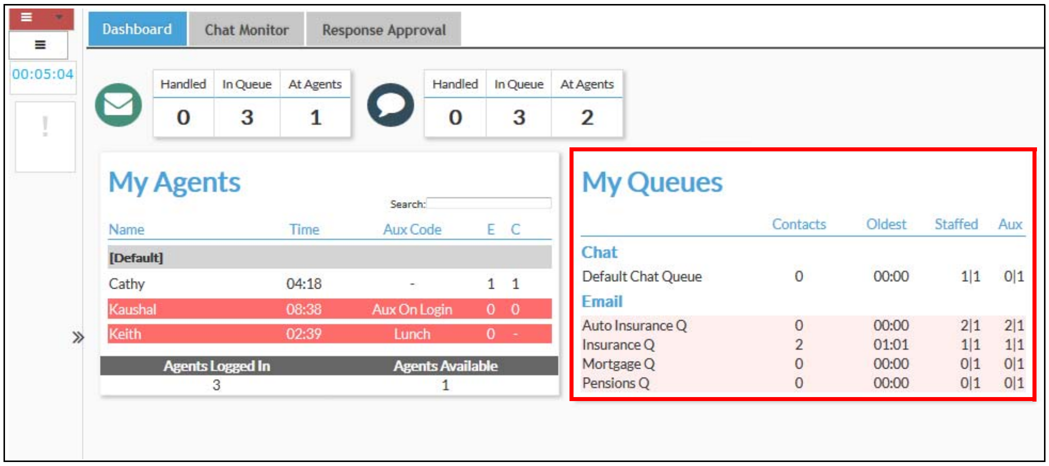
11 Multimedia Agent Desktop

The Multimedia Agent Desktop module enables supervisors to monitor the email and chat queues to which they have access and the agents assigned to those queues, reallocate and reject email contacts, approve email responses, silently monitor chat conversations, coach the agent being monitored, and join a chat in progress.

Topics covered in this chapter:

Queue Monitor

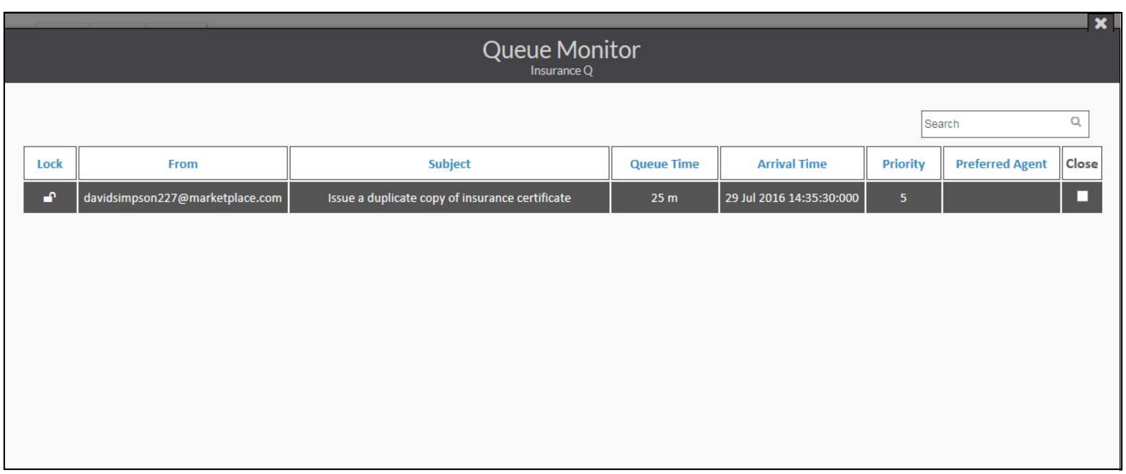
The **My Queues** panel on the dashboard displays information about each email and chat queue that has been assigned to you.



The My Queues table displays the following information about each queue.

Column	Displays
Contacts	The count of contacts currently waiting in the queue. This count includes new contacts as well as contacts that are being transferred via queues and emails that have returned to the queue upon RONA.
Oldest	The waiting time for the oldest contact in the queue in hh:mm format.
Staffed	The number of staffed agents and supervisors in the specific queue.
AUX	The number of agents and supervisors in the AUX state.

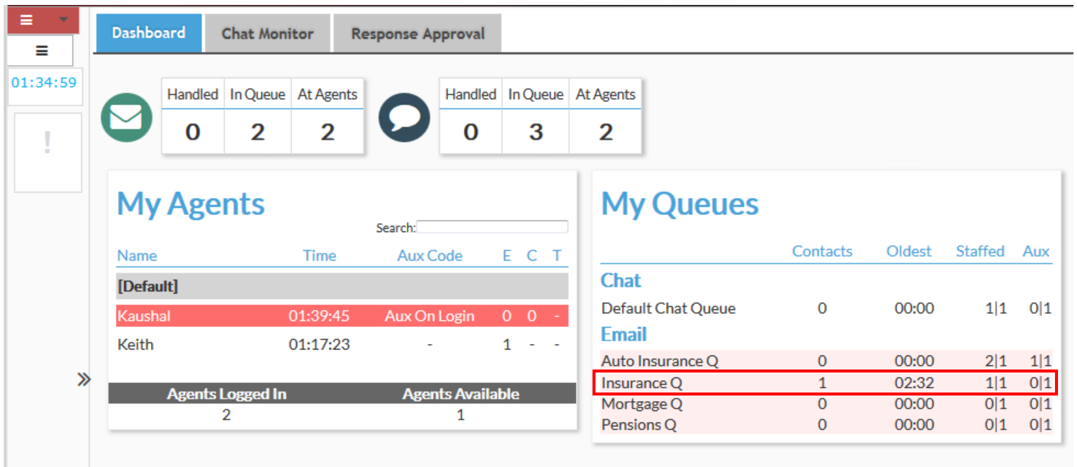
To display a list of contacts waiting in a queue, click the name of a queue to open the Queue Monitor screen.



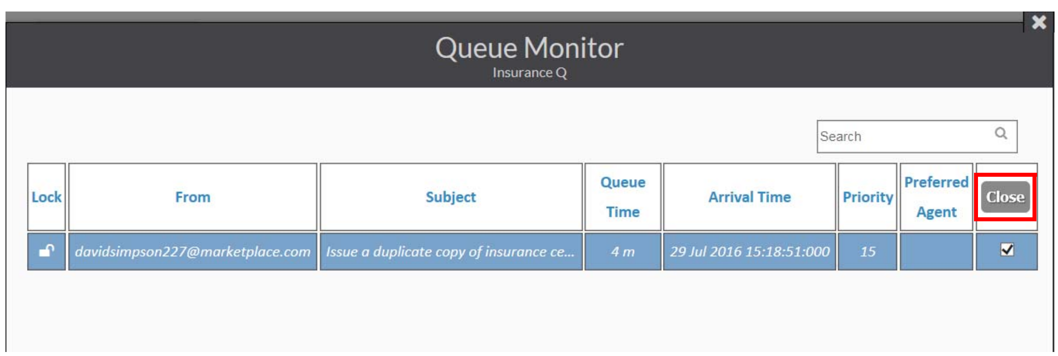
Supervisor Contact Rejection

The Queue Monitor provides an interface for monitoring the queues and viewing and rejecting unnecessary contacts (such as spam emails) that may be waiting in queue.

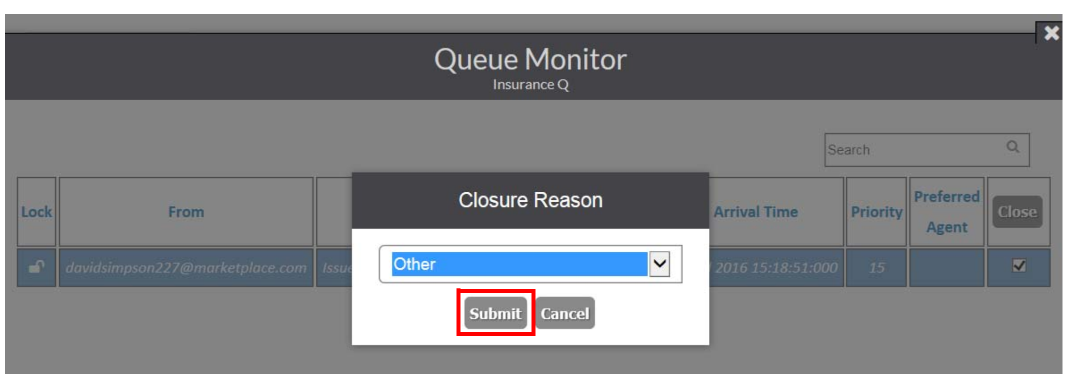
1. To view details about a contact, click the queue name in the My Queues panel.



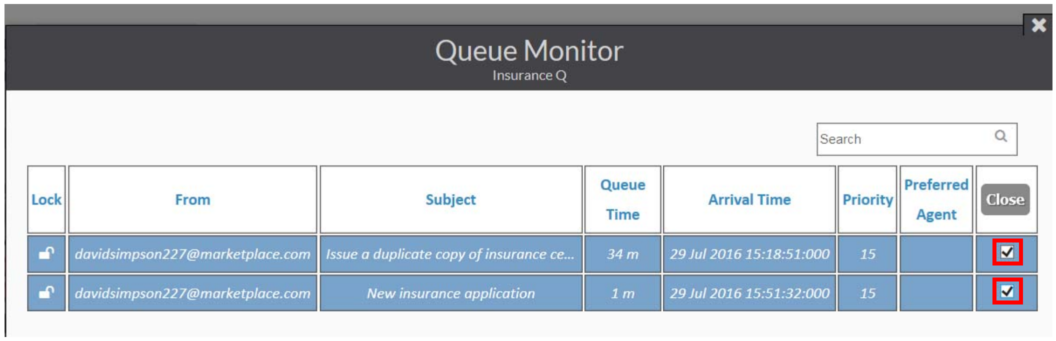
2. On the Queue Monitor screen that appears, select the check box to the right of a listed contact to mark it for rejection and then click the **Close** button.



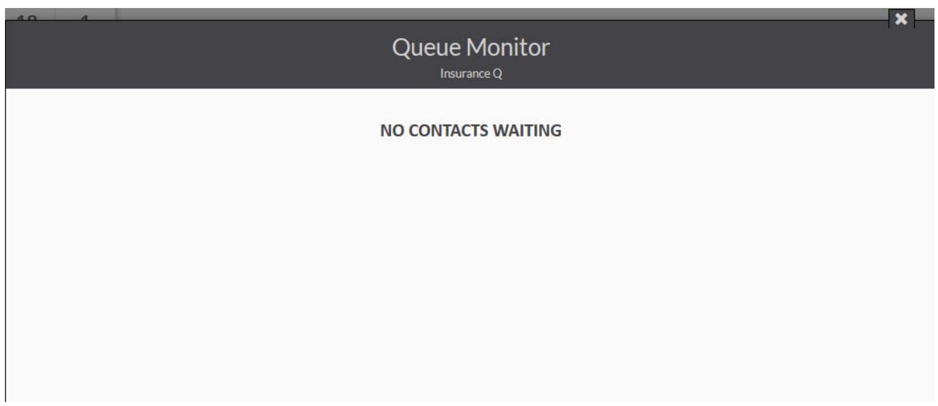
3. In the Closure Reason pop-up window, select a reason from the drop-down list and then click **Submit**.



4. You can also reject multiple contacts by selecting check boxes of the unwanted contacts and then clicking **Close** as shown in the following illustration.



5. After all unwanted contacts are rejected and no more contacts are waiting, the following confirmation message appears. Close the screen to return to the supervisor dashboard.

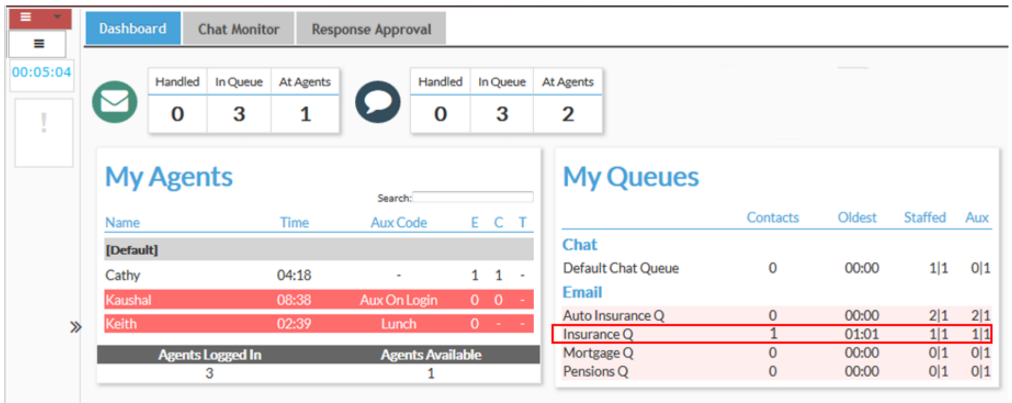


Cherry Picking

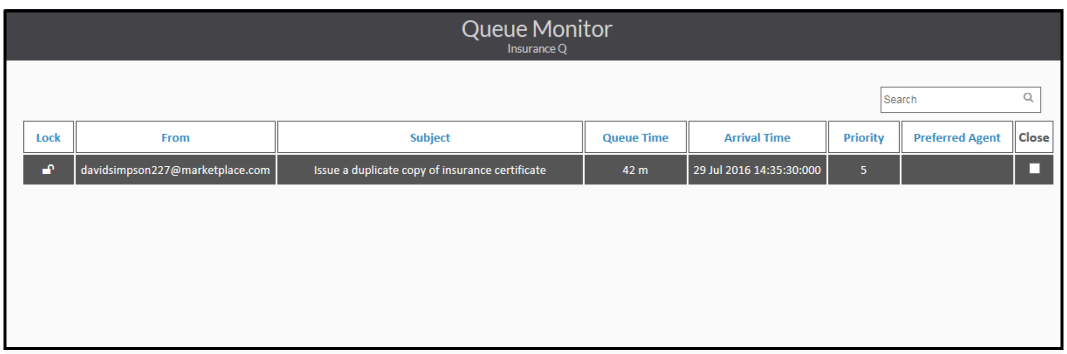
Cherry picking is a way to override the routing mechanism and assign emails waiting in a queue to other queues or agents within the queues.

To allocate a contact for a particular agent (cherry picking):

1. In the **My Queues** panel, select the queue for which you want to see the emails waiting.

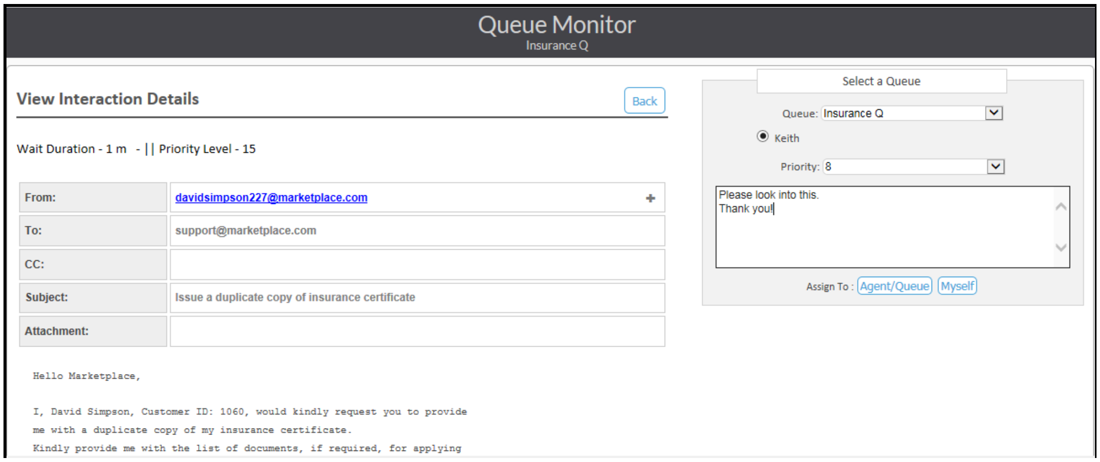


2. The Queue Monitor displays the list of emails waiting in the queue.



3. Click the **Subject** of the email to perform cherry picking.

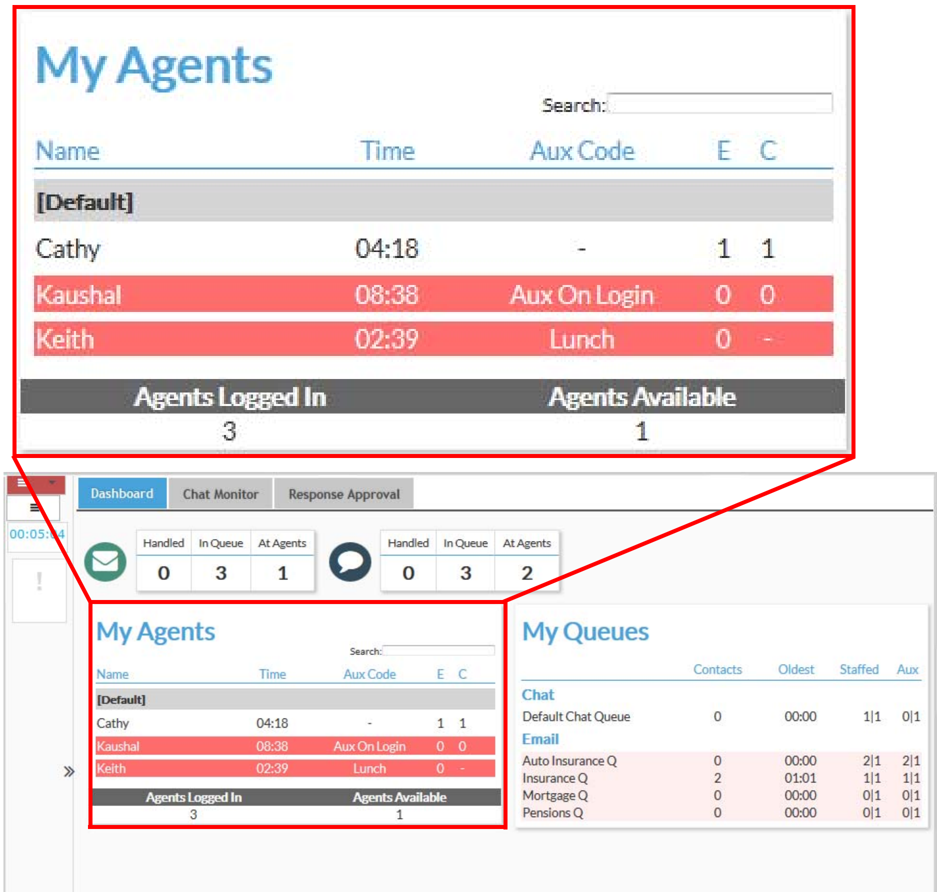
   The View Interaction Details screen appears.



4. In the **Queue** drop-down list on the upper-right side of the Queue Monitor screen, select a queue to which you want to assign the contact.
5. After the queue is selected, the names of logged-in agents are displayed:
   a. If you want to reallocate the contact to a specific agent, select the button for that agent. Do not select an agent if you want the contact to go to any logged-in agent.
   b. The **Priority** drop-down list shows the current priority of the contact. You can change the priority by selecting a different value.
   c. Click the **Agent/Queue** button.
6. Alternatively, you can assign the contact to yourself by clicking the **Myself** button.

Agent Monitor

The **My Agents** panel on the dashboard displays the number of agents logged in and the number of agents available, as well as details about each logged-in agent.

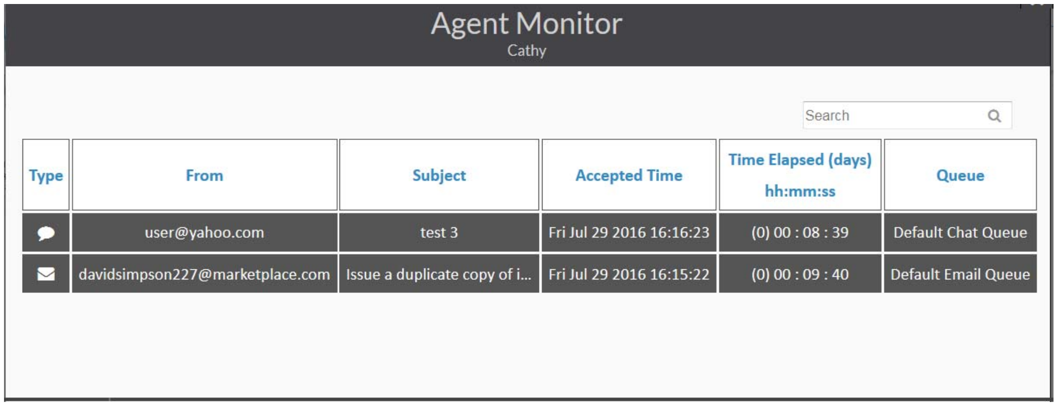


The My Agents panel displays the following information about each logged-in agent.

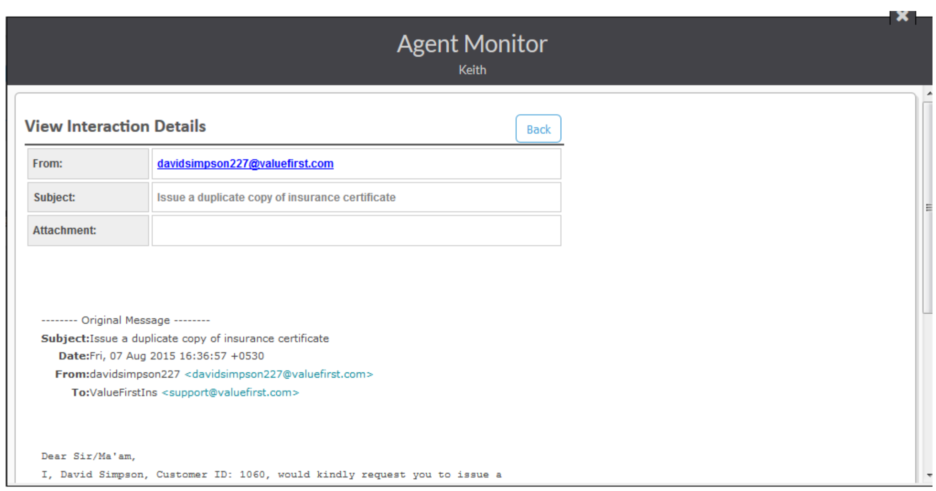
Setting	Description
Time	The amount of time each agent has been in the specific state. If the agent goes into AUX state, that agent's row becomes red in color.
E	The number of Email contacts currently assigned to each agent.
C	The number of and Chat contacts currently assigned to each agent.
Agents Logged In	The total number of agents that are logged in to the CJP Multimedia subsystem.
Agents Available	The number of agents currently available to handle contacts. Agents in AUX are not counted here.

To view an agent along with the type of channel contacts the agent has:

1. Click the channel (the example is for the email channel).



2. You can click the subject of the contact to view the interaction message.

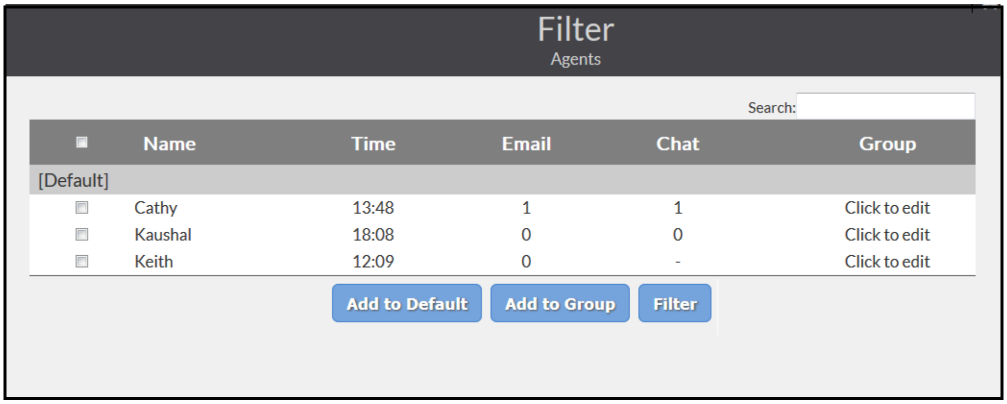


3. Click **Close**. The contact closes and you can click the agent monitor for other contacts.

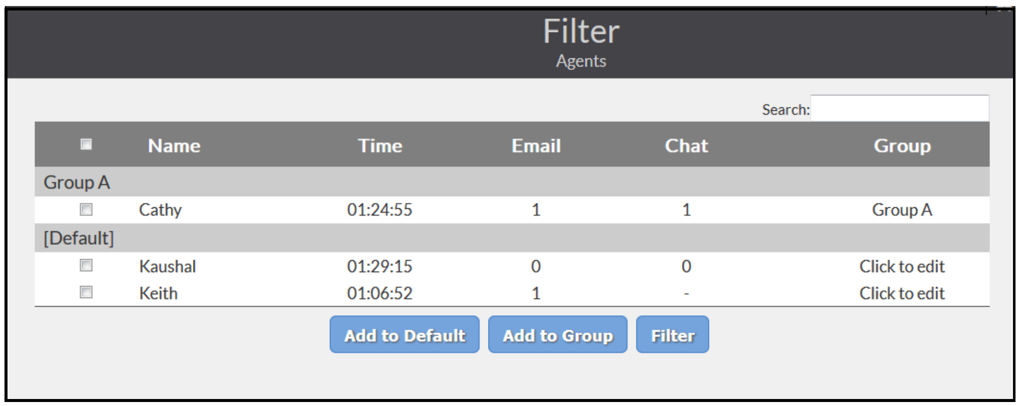
To group and filter the agents available in the My Agents list:

1. Click the ⚙ button on the top right corner of the My Agents panel to display the **Filter Agents** screen.

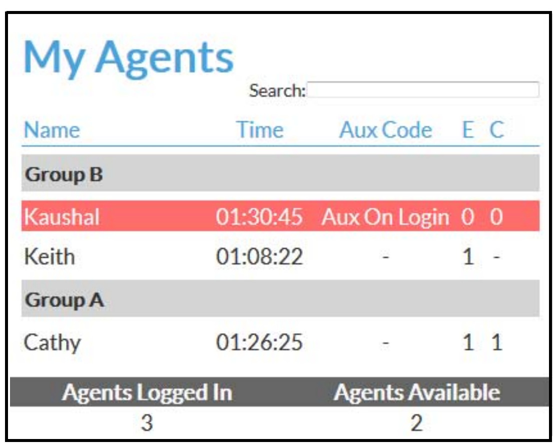
2. To update the group, click **Click to edit** in the **Group** column and then type a name for the group.



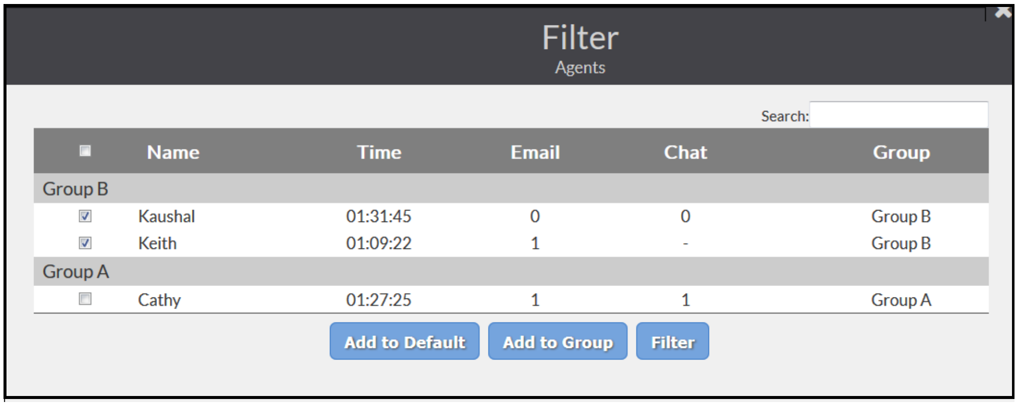
3. Select the check boxes for the agents you want to see in the list.



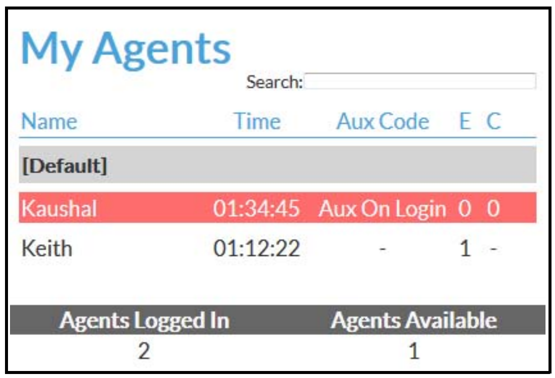
4. Click the **Filter** button to display the filtered and grouped list.



5. To reset the groups and filters, select the check boxes for agents you want to reset and click **Add to Default**.

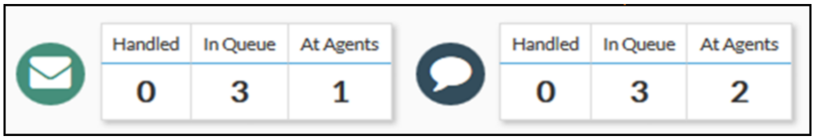


6. After you click **Add to Default** and **Filter**, you should be able to see only the selected list of agents you have filtered.



Statistics at a Glance

The Statistics at a glance component displays the activity snapshot of all the email and chat queues to which you have access and the agents assigned to those queues.



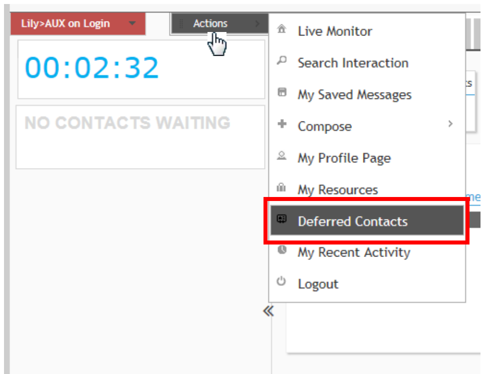
Handled	The Handled count shows the following: • The number of contacts that were closed without replying. • The number of contacts that were replied to and closed are included when the outbound email is sent to the customer. • The number of contacts that were initiated by an agent and sent out. • The number of contacts that were initiated by an agent and saved in drafts. Contacts that are transferred by agents are not counted as Handled until they are responded to. This is a start of day measure, that is, it counts the number of contacts handled since the start of the day.
In Queue	The **In Queue** count shows the total number of contacts currently in queues, waiting to be assigned to agents. If agents transfer contacts to a queue, they will be counted as In Queue.
At Agents	The **At Agents** count shows the total number of contacts that have been assigned to agents and are currently being alerted to agents and being handled by agents. If an agent has initiated an outbound contact, that contact is also counted.

Viewing and Allocating Deferred Contacts

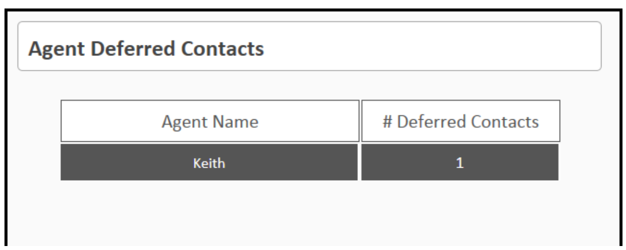
Deferred contacts are contacts that were not closed by an agent before the agent logged out. A supervisor can allocate such deferred contacts to another queue/agent.

To view and transfer the deferred contact to another queue/agent:

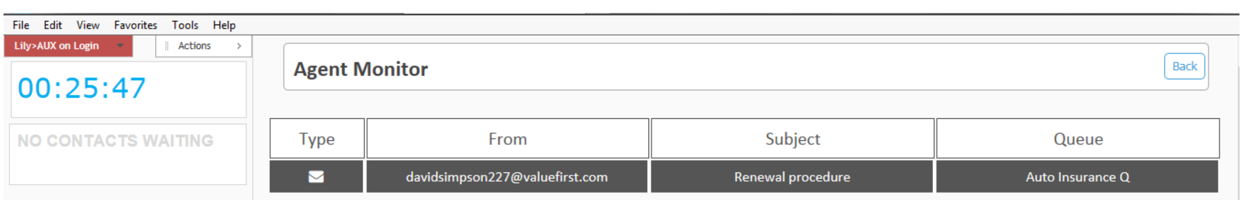
1. Click the **Action** button to display a list of options.



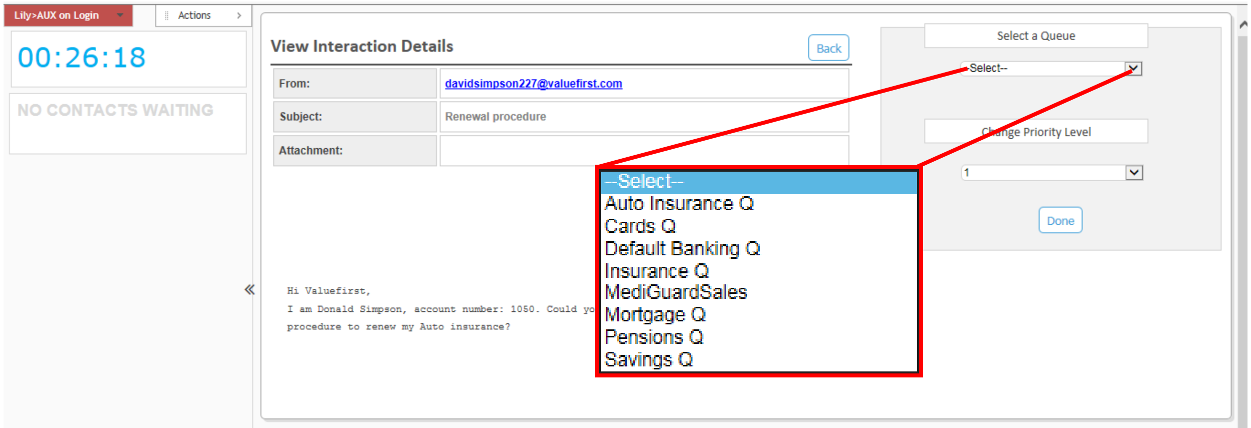
2. Select the **Deferred Contacts** option to display the Agent Deferred Monitor screen on which you can see the number of deferred contacts along with the agent name.



3. Click the name of the agent for whom the deferred contact needs to be reallocated, and on the agent-specific screen that appears, click any contact that needs to be reallocated.



4. On the **View Interaction Details** screen that appears, click the **Select a Queue** option on the upper-right side of the screen, and select the queue that you want the contact to be transferred to.

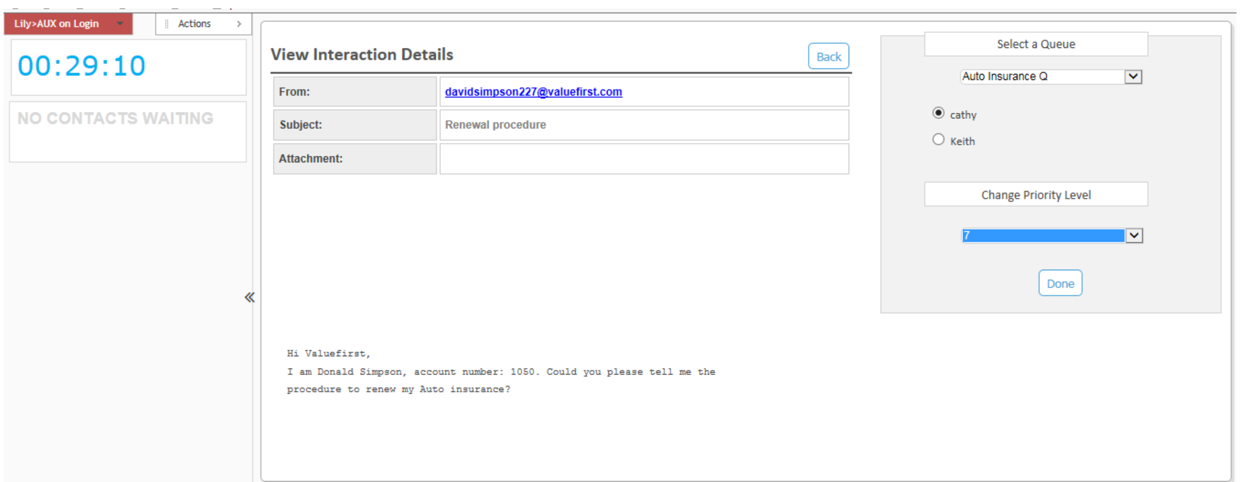


5. After the queue is selected, the names of logged-in agents are displayed:

   a. If you want to reallocate the contact to a specific agent, select the button for that agent. Do not select an agent if you want the contact to go to any logged-in agent.

   b. The **Priority** drop-down list shows the current priority of the contact. You can change the priority by selecting a different value.

   c. Click **Done**.



Performing Response Approval

An outbound email can be automatically sent to a supervisor for review and approval before being sent to the customer. Supervisor approval can be configured at the queue or agent level based on a specified percent approval setting.

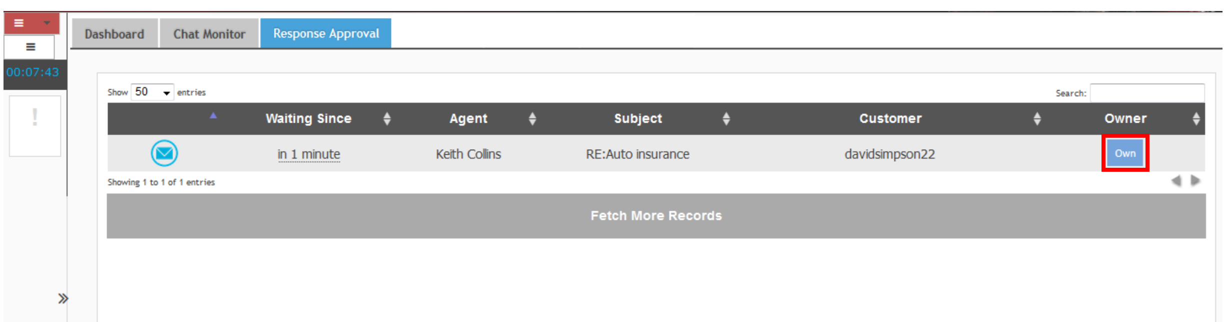
In addition, supervisor approval can be required based on a routing rule that checks for restricted keywords in an outbound email and if found, queues the contact for supervisor approval.

If the supervisor approves the email, it is sent to the customer. Optionally, the supervisor can edit the content of the email and then approve it to be sent to the customer without sending it back to the agent.

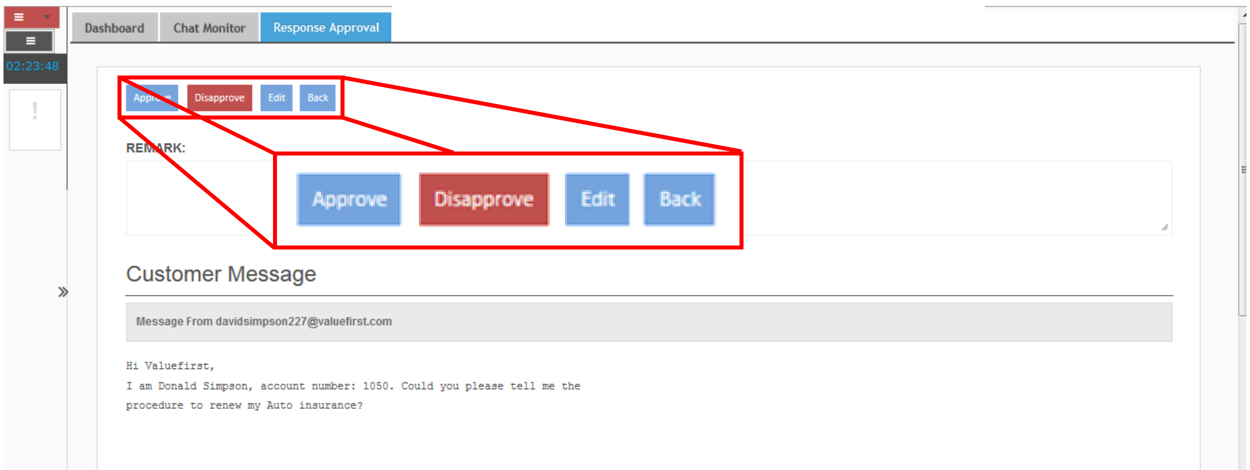
If the supervisor disapproves the email, it is sent back to the agent, who modifies the email according to the supervisor's instructions and sends the email for supervisor approval again.

To perform response approval:

1. Click the **Response Approval** tab to display a list of emails that are awaiting Supervisor Approval.
2. Select an email in the Response Approval list and click the **Own** button to assign the email to yourself.

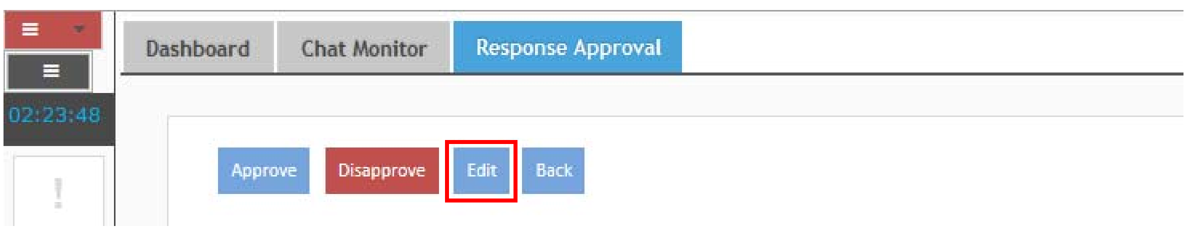


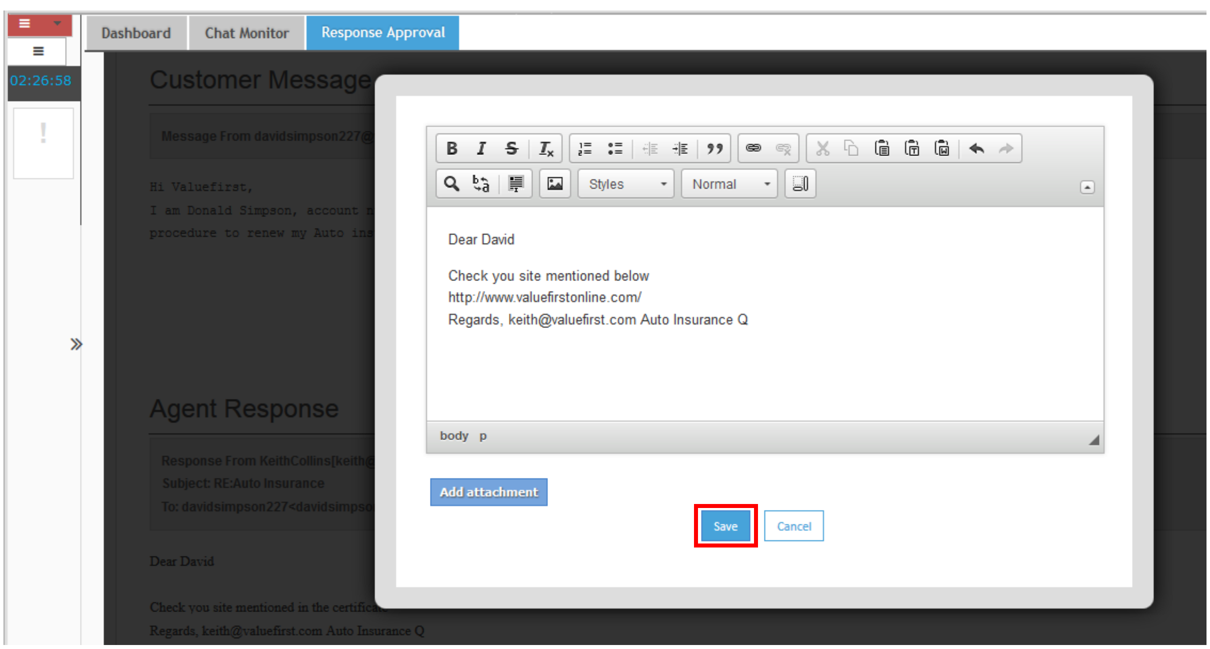
3. Click the email message. The options to approve, disapprove, and edit the message are displayed at the top of the message window.



4. To approve the message without any changes, click the **Approve** button and the email will be sent to the customer as written by the agent.

5. To make changes to the message and then send it to the customer without sending it back to the agent, click the **Edit** button, make your edits to the message, and then click **Save**.





6. To disapprove the message:
   a. In the **Remarks** section, you can write your observations about the email and provide instructions on how to fix the problems in the email response.
   b. Click the **Disapprove** button to send the email back to the agent.

Monitoring Chat Conversations

Topics covered in this section:

- Monitoring a Chat Conversation Silently
- Coaching Agents During Chat Sessions
- Joining a Chat in Progress

Monitoring a Chat Conversation Silently

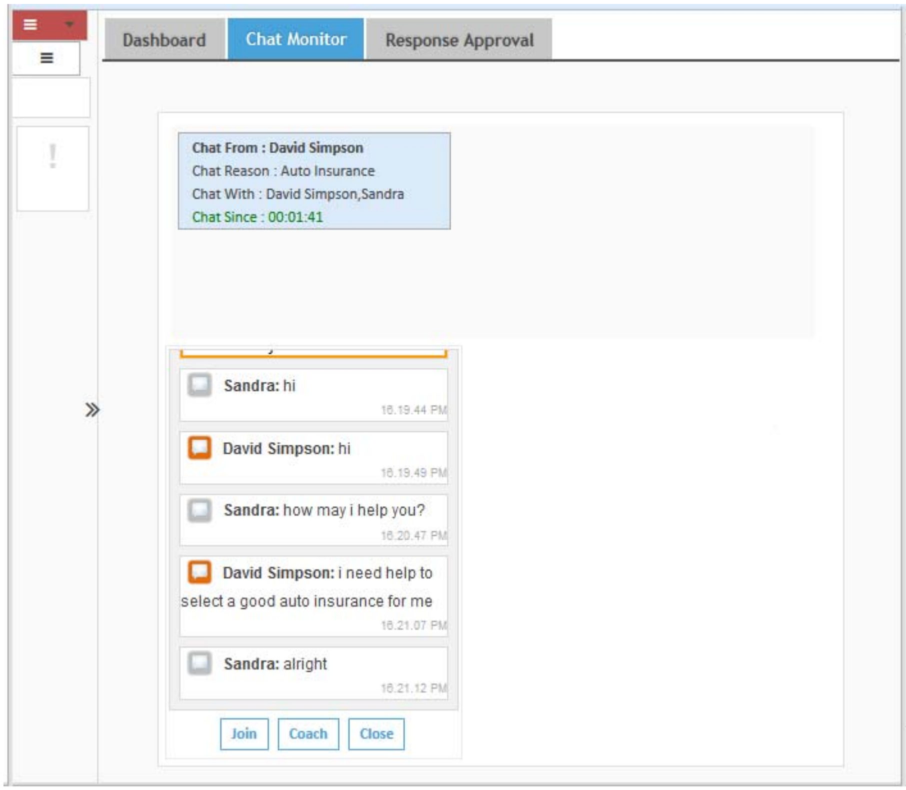
When you monitor an active chat conversation, the agent and customer engaged in the conversation have no knowledge of your presence.

To monitor a chat conversation silently:

1. Click the **Chat Monitor** tab.

   A contact card is displayed for each active chat conversation.

2. Click a chat contact card to start silently monitoring the chat conversation. Any messages exchanged between the participants before you started monitoring are listed in the new window that appears in the lower part of the screen. The participants in the chat conversation are unaware that you are monitoring.
3. Click the **Close** button to end the chat monitoring session.



Coaching Agents During Chat Sessions

While monitoring a chat conversation, you can open a private chat conversation with the agent to coach while the agent interacts with the contact.

To coach an agent during an active chat session:

1. While monitoring a chat conversation (as described in "Monitoring a Chat Conversation Silently" on page 404), click the **Coach** button.

   A new contact card appears in your **Active Contact List** in the left panel of the Agent Monitor screen. The contact card is accepted by the agent automatically and the chat session opens.

2. Type a greeting so the agent knows you are available to assist, if needed.

Joining a Chat in Progress

As supervisor, you can join a chat conversation that you have been monitoring. When you join a chat session in progress, both the agent and contact see your participation in the chat conversation.

To join an active chat session:

1. While monitoring a chat conversation (as described in "Monitoring a Chat Conversation Silently" on page 404), click the **Coach** button.
2. Click **Join** at the bottom of the conversation.

   A new contact card appears in your Active Contact List. The contact card is accepted by the agent automatically and the chat session opens. In addition, the system posts an announcement in the chat conversation indicating that you have joined the conversation.
3. Type a greeting so the agent and contact know you are available to assist, if needed.

12 Troubleshooting

This chapter provides advice for handling problems you might encounter while working with the CJP system:

- Troubleshooting CJP Management Portal Problems
  - CJP Management Portal Problems
  - Reporting Management Portal Issues to Customer Support
- Troubleshooting CJP Agent Desktop Problems
  - Network Interruptions
  - Agent Desktop Application Problems
  - Audio Problems
  - Reporting Agent Desktop Issues to Customer Support

Troubleshooting CJP Management Portal Problems

Topics covered in this section:

- CJP Management Portal Problems
- Reporting Management Portal Issues to Customer Support

CJP Management Portal Problems

If you experience a problem while using the CJP Management Portal, the following may help you solve the problem.

Problem	Description/Workaround
You cannot log in to the CJP Management Portal.	Check to make sure that the correct user name and password are entered.
You cannot access a module from the Management Portal, or you cannot see some entry points or queues.	You do not have the correct privileges to access these modules, entry points, or queues. Contact your CJP administrator.
The Management Portal does not display data regarding agents or calls, or shows that no agents are logged in.	Make sure that the privacy setting for Internet Explorer is set to **Medium**.
Occasionally the message "Please Refresh the Page" appears in the Real-Time Reports module.	Log out of the current CJP session. Close any remaining CJP windows and log in again.
When you resize the Agent view of a real-time agent report, tooltips for idle and wrap-up codes are sometimes displayed in the graph area instead of near the cursor.	Maximize the window to display the tooltip near the cursor.
Too many abandoned calls are being reported.	Escalate to Customer Support.
While viewing a chart in a report or on a monitoring page, you see the following message "Communication Interruption on <date> at <time>".	The system has been unable to refresh the data in the chart since the time indicated in the message, typically because of an intermittent network interruption or server issue. If the problem persists for several minutes, notify your system administrator.
The real-time reports are not refreshing on the Management Portal.	Escalate to Customer Support.
The real-time report statistics are not displayed.	Escalate to Customer Support.

Problem	Description/Workaround
In a real-time agent report, the wrap-up count and number of entered wrap-up codes do not match.	This discrepancy occurs when an agent logs out while still in the Wrap-up state without selecting a wrap-up code. Instruct agents to always go into the Idle state and then click the Log Out button to log out rather than closing the browser while logged in.
Changes to the names of existing idle and wrap-up codes do not appear immediately in agent reports. Instead, agent reports display the previous code names before they were edited or *N/A* for a new code.	Log out and then log in again to see the changes.
When exported to CSV format, data in the Agent View of a current snapshot agent report is displayed incorrectly.	The Time Value is displayed in two cells instead of one when exported to CSV format. This is because a comma separates the day from the date and time in the Login Time field.
When you export historical report data to Microsoft Excel that includes date and time in the hh:mm:ss format, Excel displays only the hours and minutes, and not the seconds.	By default, Excel displays the data in hh:mm format. However, you can double-click in the cell to see the data in hh:mm:ss format.
For a new team, data in the agent interval report is displayed in half-hour intervals from the time an agent on the team logs in after system restart.	This is transient for teams that log in for the first time. Normally, data is displayed in half-hour intervals from midnight.
In the Historical Reports module, occasionally the parameters for a customized default report are not saved after you log out and log in again.	After you save a custom report, wait 10–15 seconds before logging out.
You cannot make a monitoring request.	Ensure that you are using the correct DN and prefix.
Monitoring session left open for an hour or longer displays a blank page or unexpected behavior.	Close the module and re-open it.
Supervisor phone rings even when the monitoring request is for a different queue.	If a monitoring request is made for a **team** and if multiple queues use the same team for routing, any of the queue’s calls for that team can be monitored.
A call ends, but the monitoring screen indicates that the call is still in progress.	Escalate to Customer Support

Reporting Management Portal Issues to Customer Support

When escalating a Management Portal issue to Cisco CJP Customer Support, make sure to provide the following information:

- The login and user name of the person experiencing the problem.
- The time that the issue was first observed.
- If the problem occurred in the Monitoring module, the number that the supervisor was attempting to call and a call session ID, if available.

Troubleshooting CJP Agent Desktop Problems

Topics covered in this section:

- Network Interruptions
- Agent Desktop Application Problems
- Audio Problems
- Reporting Agent Desktop Issues to Customer Support

Network Interruptions

If a network interruption occurs that lasts for less than two minutes, all the Agent Desktops display a “Reconnecting” message and then successfully reconnect.

If a network interruption lasts longer than two minutes, instruct agents to close the current Agent Desktop window, and then log in using the primary URL. If the login fails with the primary URL, instruct agents to use the backup application center login.

Escalate all network interruptions; report the time the problem occurred and the number of agents affected.

If the network to the primary application center is down, CJP Management Portal users cannot view any statistics.

Agent Desktop Application Problems

If you experience a problem while using the Agent Desktop application, the following may help you solve the problem.

Problem	Description/Workaround
You are not able to log in to the Agent Desktop.	1. Check to make sure that cookies are enabled in Internet Explorer. 2. Ensure that the correct user name and password are entered in the login screen.
During login, the error message “Invalid phone number” appears after you click **Go**.	Check the format of the DN that you entered and make sure the number is valid.
You accidentally closed the browser window while on a call.	If you close the browser window while on a call, you cannot log in again until you complete the call. If you close the browser window while the call is on hold, the system automatically takes the call off hold.
When you refresh the Agent Desktop window, you are logged out and the login screen is displayed.	Log in again. Avoid refreshing the window while logged in.
The status bar on the Agent Desktop displays “Not Responding” and your phone does not ring.	1. Check the volume setting on the phone and make sure that the ringer is set to “high.” 2. Check the DN (dial number), including the dialing prefix, and make sure it is correct. 3. After resolving the problem, change your state to Available or Idle by clicking one of the buttons on the message that appeared when you entered the Not Responding state.
After reconnecting to the system following a network interruption, you are suddenly logged out.	Log in to the Agent Desktop again. If you are unable to log in, escalate to Customer Support.
Re-launching the Agent Desktop while logged in may create problems.	Do not open more than one Agent Desktop application at a time on the desktop.
The Agent Desktop becomes very slow.	This can happen when you leave the Agent Desktop open for long periods of time. Close both the Agent Desktop and the browser after logging out of the system. If this does not help, end the process from within the Windows Task Manager.
The Agent Desktop occasionally logs out agents following a network interruption.	Log in to the Agent Desktop again.
The Agent Desktop is not completely displayed.	Minimize the Agent Desktop, and then restore it from the taskbar.
Launch pages and graphs are not displayed properly.	Make sure that in Internet Explorer, the Show Pictures option is selected in the Advanced tab of the Internet Options dialog box.

Problem	Description/Workaround
You are available but no calls are sent to you.	Make sure you are in the Available state and are logged in to the correct team.
You are talking to a customer, but the Agent Desktop status bar displays *Reserved*.	Report the incident to Customer Support.
Your agent softphone is not ringing, but the Agent Desktop status bar displays *Not Responding*.	Make sure that you entered the correct DN.
The Agent Desktop status bar displays *Re-connecting*.	Check to see if the PC network cable has been disconnected or loosened. If you do not see a message indicating that there has been a network problem, escalate to Customer Support.
You answer a call, but the call disconnects after 30 seconds.	If *Not Responding* is displayed in the Agent Desktop status bar, change to the Available state and wait for the next call.
The Internet Explorer browser freezes.	Open Windows Task Manager and end all browser processes.
Pop-up blockers appear.	From the Internet Explorer Tools menu, disable pop-up blockers.
The Agent Desktop status bar displays a *connected* state while the phone is ringing.	Report the incident to Customer Support.
An outbound call fails.	Make sure you entered the correct DN and prefix.
During a blind transfer, call details are not displayed on the Agent Desktop of the receiving agent while that agent is in the Reserved state.	The Reserved state is very transient. Call details are displayed as soon as the second agent answers the call.

Audio Problems

The following may help to resolve audio problems that could occur while using the Agent Desktop.

Problem	Description/Workaround
Echo or low volume	Check the phone settings. If using a softphone, check the Microsoft Windows and softphone settings.
Jitter/Stutter audio -OR- High latency	Bad connectivity, probably due to a network problem. Check to make sure that your PC is not also running other software that uses audio. Escalate to Customer Support.
Cross talk	Escalate to Customer Support.
One-way audio	Make sure you are not on mute. If not, escalate to Customer Support.

Reporting Agent Desktop Issues to Customer Support

When escalating an Agent Desktop issue to Cisco CJP Customer Support, make sure to provide the following information:

- Ask the agent to provide a screen capture of the Agent Desktop screen.
- Include the time that the issue was first observed.

A CJP Report Parameters

This appendix provides descriptions of the parameters available in CJP reports.

Topics covered:

Call Report Parameters

The parameters available in CJP real-time and historical call reports are described in the following table. In the table, *CDR* is an abbreviation for *Call Detail Report*.

Parameter	Description	Report
% Abandoned	The percentage of calls that were abandoned during the report interval. (Abandoned/Total) * 100	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
% Answered	The number of answered calls divided by the number of calls that entered the queue minus short calls multiplied by 100. (Answered/(Answered + Abandoned)) * 100	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Abandoned	The number of calls that were abandoned during the report interval. An abandoned call is a call that was terminated without being distributed to a destination site, but that was in the system for longer than the time specified by the Short Call threshold provisioned for the enterprise.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues

Parameter	Description	Report
Abandoned Time	The cumulative amount of time calls were in the system for longer than the time specified by the Short Call threshold, but terminated before being distributed to an agent or other resource.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report). **Note:** Although this metric is visible for outdial calls, it is not meaningful for such calls.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Adjusted Service Level %	The number of calls that were either answered or abandoned within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100. ((In Service Level + Abandoned within SL) / (Answered + Abandoned)) * 100 **Note:** Although this metric is visible for outdial calls, it is not meaningful for such calls.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams
Agent	The name of the agent who handled the call or a numeric ID code if the call was handled by a capacity-based team resource instead of by a CJP agent.	CDR
Agent Start Time	The time the agent picked up the phone and began talking with the caller.	CDR
ANI	The ANI digits delivered with the call. ANI, or Automatic Number Identification, is a service provided by the phone company that delivers the caller's phone number along with the call.	CDR
Answered	The number of calls that were routed from the queue to an agent or available resource and were answered by the agent or resource.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Answered Time	The cumulative amount of time between when calls entered the queue and when they were answered (connected to an agent or other resource) during the report interval. Because answered time is calculated after the call is answered, answered time for calls that are waiting to be answered is not reflected in the report.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Available Agents	The number of logged-in agents who are currently in the Available state.	Call Snapshot report

Parameter	Description	Report
Avg Abandoned Time	The total amount of time that calls were in the system before they were abandoned divided by the total number of calls that were abandoned: Abandoned Time/Abandoned	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Avg Connected Time	The total connected time divided by the total number of calls that were answered during the report interval: Connected Time/(Answered + Secondary Answered)	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg Handle Time	The average length of time spent handling a call (connected time plus wrap-up time), divided by number of answered calls: Connected Time+Wrap Up Time/(Answered + Secondary Answered)	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg IVR Time	The total amount of time that calls were in the IVR system divided by the total number of calls that were in the IVR system.	Real-time Call Interval & Historical Call reports for Entry Points
Avg Queued Time	The total amount of time that calls were in queue divided by the total number of calls that were queued: Queued Time/Queued	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues.
Avg Speed of Answer	The total answered time divided by the total number of answered calls: Answered Time/Answered	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg Wrap Up Time	The total amount of time agents spent in the Wrap-up state divided by the total number of answered calls: Wrap Up Time/(Answered + Secondary Answered)	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Blind Transfer Count	The number of times the call was transferred out of the queue by the agent without consulting first.	CDR

Parameter	Description	Report
Blind Transfers	The subset of transferred out calls that were transferred by the agent to another agent or an external DN without the first agent consulting or conferencing with the party to whom the call was transferred.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Call Duration	The amount of time between when the call arrived at the entry point or queue and when it was terminated.	CDR
Call End Time	The time the call was terminated.	CDR
Call Start Time	The time the call arrived at the entry point or queue.	CDR
Completed	The number of calls that ended during the report interval. Answered, abandoned, and disconnected calls are included in this count. Transferred and short calls are not.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Conference Count	The number of times the agent established a conference call with the caller and another agent.	CDR
Conference Count	The number of times agents initiated a conference call to an agent or external number.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Conference Time	The amount of time an agent spent in conference with the caller and another agent.	CDR
Connected	The number of calls currently connected to an agent.	Call Snapshot report
Connected Time	The time interval between when calls were answered by an agent or other resource and when they were terminated. Because connected time is not calculated until the call is terminated, the connected time for a call that is still in progress is not reflected in the report.	Real-time call interval reports for Sites, Teams, Queues, & Skills by Queue; Historical Call reports for Queues, Sites, & Teams
	The total amount of time the call was connected to an agent (talk time plus hold time).	CDR

Parameter	Description	Report
Consult Count	The number of times agents initiated a consult with another agent or someone at an external number while handling a call.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
	The number of times the agent consulted another agent during the call.	CDR
Consult Errors	The number of times agents did not respond to a consult invitation.	CDR
Consult Time	The amount of time an agent spent consulting with another agent while handling this call.	CDR
CTQ Answer Count	The number of times consult-to-queue requests were answered.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
CTQ Answer Time	The cumulative amount of time between when consult-to-queue requests were answered and when the consultations ended.	Historical Call reports for Queues, Sites, & Teams
CTQ Request Count	The number of times consult-to-queue requests were initiated.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams; CDR
CTQ Request Time	The cumulative amount of time between when consult-to-queue requests were initiated and when the consultations ended.	Historical Call reports for Queues, Sites, & Teams; CDR
Current Service Level %	The percentage of calls in queue that have not yet reached the Service Level threshold provisioned for the queue (in a queue report) or skill (in the skill rows of a skills-by-queue report). Note that although this metric is visible for outdial calls, it is not meaningful for such calls.	Call Snapshot report
Disconnected	The number of calls that were answered (that is, connected to an agent or distributed to and accepted by a destination site), but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams

Parameter	Description	Report
DN	The number the caller dialed (DNIS).	All DN Canned report
DNIS	The DNIS digits delivered with the call. DNIS, or Dialed Number Identification Service, is a service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.	CDR
Entry Point	The name of the entry point associated with the call.	CDR
From Entry Point	The number of calls that entered this queue after having been classified into the queue from an entry point by the IVR call control script.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
	The number of calls that came in to this entry point from another entry point.	Real-time Call Interval & Historical Call reports for Entry Points
Full Monitored Calls	The number of calls that were monitored from beginning to end.	Monitored Calls report
Handle Time	The amount of time spent handling the call (Connected Time + Wrap Up Time).	CDR
	The cumulative amount of time spent handling calls: Connected Time + Wrap Up Time	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Handle Type	How the call was handled. Possible values: • **park.** The call was queued in the CJP network and subsequently ended without being distributed to a site. • **park_and_transfer**. The call was queued in the CJP network and subsequently distributed to a site. • **straight_transfer.** The call was distributed to a site upon arrival without being queued in the CJP network. • **ivr.** The call was handled by the IVR but the caller disconnected before the call was transferred or parked. • **unknown.** This is the default value when no other value overrides it.	CDR

Parameter	Description	Report
Hold Count	The number of times the call was put on hold.	CDR
	The number of times a caller was put on hold.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Hold Time	The amount of time the call was on hold in this queue (for a queue CDR) or in all underlying queues (for an entry point CDR).	CDR
In IVR	The number of calls that are currently in the IVR system.	Call Snapshot report
In Queue	The number of calls currently in the queues that are covered in the report. In the case of entry-point reports, this is the number of calls that are currently in queues fed by the entry point. In entry point and queue reports, you can click a number in this column to display the *Age of Calls in Queue* pie chart in a pop-up window. The chart displays the number of calls that have been in the queue for the length of time represented by three time segments. The time segments are derived by dividing the *Longest Time in Queue* value by three, rounding the resulting value down to the nearest 10 seconds, and then multiplying that value by 1, 2, and 3. For example, if the Longest Time in Queue value is 85 seconds, then 85/3=28.3, which is rounded down to 20, and the chart displays time segments of 20, 40, and 60 seconds.	Call Snapshot report
In Service Level	The number of calls that were answered within the Service Level threshold provisioned for this queue or skill (in a skills interval by queue report). **Note:** Although this metric is visible for outdial calls, it is not meaningful for such calls.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams
Invisible Monitored Calls	The number of calls that were monitored using the Invisible mode, which prevents the monitoring session from being displayed on Management Portals other than that of the initiating supervisor.	Monitored Calls report
IVR Ended	The number of calls that ended in the IVR but were not short calls. (Call interval real-time and Historical call reports for entry points)	Real-time Call Interval & Historical Call reports for Entry Points

Parameter	Description	Report
IVR Time	The amount of time the call was in the IVR system.	CDR
	The cumulative amount of time calls were in the IVR system.	Real-time Call Interval & Historical Call reports for Entry Points
Logged-in Agents	The number of agents who are currently logged in to this team or to all teams at this site. At the queue level, this is the number of agents logged in to all teams at the sites serving this queue.	Call Snapshot report
Longest Call In Queue Time	The longest amount of time a call has been in each queue covered in the report.	Call Snapshot report
Maximum Wait Time	The longest amount of time a call was in the queue waiting to be answered.	Historical Call reports for Queues
Midcall Monitored Calls	The number of calls for which monitoring began after the call was already in progress.	Monitored Calls report
Monitor Flag	Whether or not the call was monitored, coached, or barged in on. Possible values: • **Not Monitored.** The call was not monitored • **Monitored.** The call was monitored. • **Whisper-Coach.** While the call was being monitored, the monitoring supervisor coached the agent, but did not barge in on the call. • **Barged-In.** While the call was being monitored, the monitoring supervisor barged in on the call.The supervisor might have also coached the agent. (If the call was both coached and barged-in on, the value of this parameter is *Barged-In*). For information about monitoring, see Chapter 7, “Call Monitoring” beginning on page 307.	CDR
New	The number of external calls that came in to the entry point.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that came into the system via a specific dialed number.	All DN Canned report
No. of Transfers	The number of times the call was transferred by an agent.	CDR

Parameter	Description	Report
Overflow	The number of calls that were sent to the overflow number provisioned for the queue and were answered. Typically, a call is sent to an overflow number if it has been queued for longer than the maximum time specified in the routing strategy or because an error occurred when the call was sent to an agent. If the call is not answered, it is included in the Abandoned or Disconnected count when it ends.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Queue	The name of the queue associated with the call.	CDR
	The name of the queue that was monitored.	Calls Monitored report
Queue Time	The amount of time the call was in a queue waiting to be sent to a destination site.	CDR
Queued	The number of calls that entered the queue during this interval.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Queued Time	The cumulative amount of time calls were in queue, waiting to be sent to an agent or other resource. Because queued time is calculated after the call leaves the queue, the queued time for a call that is still in the queue is not reflected in the report.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Record Flag	Whether or not the call was recorded by CJP through the optional call recording feature.	CDR
Requeued	The number of calls that left this queue after having been transferred by the agent to another queue. For calls to be requeued, the first agent clicks the **Queue** button, selects a queue from the drop-down list, and clicks **Transfer**.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
S No.	A sequence number identifying each leg of a call as it moves through the CJP system. Click an entry in this column to open a window displaying the history of the call throughout its life cycle.	CDR
Secondary Answered	The number of calls that were answered by an agent after being transferred to the agent by another agent.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams

Parameter	Description	Report
Service Level %	The number of calls that were answered within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100: ((In Service Level)/(Answered + Abandoned)) * 100 **Note:** Although this metric is visible for outdial calls, it is not meaningful for such calls.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams.
Session ID	A value assigned by the system that uniquely identifies a call during its life cycle.	CDR
Short	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being distributed to a destination site or connected to an agent.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being connected to an agent.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Site	The contact center location to which the call was distributed.	CDR
	The name of the site that was monitored.	Monitored Calls report
Team	The name of the team to which the call was distributed.	CDR
	The name of the team that was monitored.	Monitored Calls report
Terminating Party	Who terminated the call: Agent or Caller	CDR

Parameter	Description	Report
Termination Type	How the call was terminated. Possible values: • **abandoned.** The call was terminated before being distributed to a destination site, but was in the system for longer than the time specified in the Short Call threshold provisioned for the enterprise. • **agent_transfer.** The call was transferred from one agent to another. • **transfer_error.** The call could not be transferred to the agent. • **normal.** The call ended normally. • **reclassified.** The call was sent to another entry point. • **transferred.** The call was transferred by an agent. • **self_service.** The call ended in the IVR. • **short_call.** The call was never connected and the total duration of the call was less than the specified Short Call threshold. • **quick_disconnect.** The call was connected, but the agent talk time for the call was less than the specified Sudden Disconnect threshold. • **overflow.** The call was transferred to the overflow destination number provisioned for the queue—typically because the call was queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent.	CDR
To Entry Point	The number of calls that were transferred to another entry point.	Real-time Call Interval & Historical Call reports for Entry Points
To Queue	The number of calls that were sent to a queue.	Real-time Call Interval & Historical Call reports for Entry Points
Total Monitored Calls	The total number of calls monitored during the report time interval.	Monitored Calls report
Transfer Errors	The number of times an error occurred during the transfer process.	CDR

Parameter	Description	Report
Transferred	The sum of all calls transferred from this queue to an agent, external DN, or another CJP queue: Transferred Out + Requeued	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Transferred In	The number of calls that were transferred to this entry point by an agent.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that entered this queue after having been transferred into the queue by an agent who clicked the **Queue** button, selected a queue from the drop-down list, and clicked **Transfer**.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Transferred Number	The phone number to which the agent transferred the call in an agent-to-DN transfer. This parameter appears in the CJP window that opens when you click an entry in the S No. (sequence number) column of either an entry point or queue call detail record (CDR) as described in step 7 on page 265.	CDR
Transferred Out	The number of calls that left this queue after having been transferred by an agent to an external DN or to another agent. Transferred out calls result when an agent clicks the **Agent** button, selects an agent from the drop-down list, and clicks **Transfer**, or when the agent clicks the **DN** button, enters a phone number, and clicks **Transfer**. Transferred out calls may begin as a consultation or conference, but will be counted as transferred out only when the first agent completes the transfer to the second party.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Wrap Up	The wrap-up code that the agent gave for the call. Note that if the agent wraps up the call after the CDR is generated, the corresponding CDR will be updated after the agent selects the wrap-up code for that call.	CDR
Wrap Up Time	The amount of time an agent spent in the Wrap-up state after handling the call.	CDR
	The cumulative amount of time agents spent in the Wrap-up state after handling the calls.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams

Agent Report Parameters

The parameters available in CJP real-time and historical agent reports are described in the following table. In the table, *ADR* is an abbreviation for *Agent Detail Report*.

Parameter	Description	Report
Action	Icons you can click to perform an action: • Click the **Logout** ( ) icon to log out the agent. For more information, see "Logging Out an Agent" on page 236. • Click the **Monitor** icon ( ) to open the Call Monitoring module where you can monitor the agent's call by entering your callback number and clicking the **Midcall Monitor** button. This icon is displayed only in the Team view and only if the agent is in the Connected state and your user profile authorizes midcall monitoring. For more information, see Chapter 7, "Call Monitoring" beginning on page 307.	Snapshot/Team & Skill views
Agent	The name of an agent in the report. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the a collapse arrow ( ) or expand arrow ( ) to the left of an agent name to collapse or expand the data grouped by channel type.	Snapshot/Agent view; Real-time Agent Interval/ Agent-level
Agent Requeue	The number of times an agent requeued an inbound call.	Historical Agent Summary & Interval reports; ADR; Snapshot/ Agent view; Agent Trace report
Agent Transfer	The number of times an agent transferred an inbound call to another agent.	Historical Agent Summary & Interval reports; ADR; Agent Trace report

Parameter	Description	Report
Available	**Count.** The number of times an agent went into the Available state. **Total Time.** The total amount of time an agent spent in the Available state. **Average Time.** (*Not in ADR or Snapshot/Agent view or Agent Trace report*) The average length of time agents were in the Available state (Total Available Time divided by Available Count). **% Time.** (*Only in ADR*) The percentage of time the agent was in the Available state.	Historical Agent Summary & Interval reports; ADR & Snapshot/Agent view; Agent Trace report
	The number of agents currently in the Available state or, in the Skill view, the number of agents in the Available state who possess the skill.	Snapshot/Site, Skill, & Skills by Team views
Available Time	The amount of time agents were in the Available state during the time interval.	Real-time Agent Interval reports
Average Connected Time	The connected time divided by the number of calls that were connected during the time interval.	Real-time Skills Interval by Team
Average Handle Time	The average length of time spent handling a call (connected time plus wrap-up time, divided by number of calls).	Real-time Skills Interval by Team
Blind Transfer	The number of times an agent transferred an inbound call without consulting first.	Historical Agent Summary & Interval reports; ADR; Snapshot/Agent view; Agent Trace report
Calls Handled	The number of calls the agent handled (or, for the Skill view, the number of calls the agent handled for that skill) since logging in. Rest the cursor over a number in this column to display a pop-up showing the wrap-up codes the agent entered and how many times each code was entered.	Snapshot/Team view & Skill view
	The total number of inbound and outdial calls handled.	Historical Agent Summary & Interval reports
Channel	The media channel associated with the activity. (Appears only if your enterprise uses the Multimedia feature.)	ADR; Agent Trace report
Conference	The number of times the agent initiated a conference call.	Historical Agent Summary & Interval reports; ADR; Snapshot/Agent view; Agent Trace report

Parameter	Description	Report
Connected	The number of agents currently connected to an inbound call, or in the Skill view, the number of agents connected to a call who possess the skill.	Snapshot/Site, Skill, & Skills by Team views
Connected Time	The amount of time inbound calls were connected to an agent during the time interval (talk time plus hold time).	Real-time Skills Interval by Team
Consult	**Count.** The number of times an agent answered a consult request plus the number of times an agent consulted other agents. **Total Time.** Total Consult Answer Time plus Total Consult Request Time. **Average Time.** (*Not in ADR or Agent Trace report*) The average length of consulting time (Total Consult Time divided by Consult Count).	Historical Agent Summary & Interval reports; ADR; Agent Trace report
Consult Answer	**Count.** The number of times an agent answered a consult request from another agent. **Total Time.** The total amount of time an agent spent answering consult requests from agents. **Average Time.** (*Not in ADR or Agent Trace report*) The average length of time agents spent answering consult requests (Total Consult Answer Time divided by Consult Answer Count). **% Time.** (*Only in ADR and Agent Trace report*) The percentage of time the agent spent answering consult requests.	Historical Agent Summary & Interval reports; ADR; Agent Trace report
Consult Request	**Count.** The number of times an agent sent a consult request to another agent. **Total Time.** The total amount of time an agent spent consulting other agents. **Average Time.** (*Not in ADR or Agent Trace report*) The average length of time agents spent consulting other agents (Total Consult Request Time divided by Consult Request Count). **% Time.** (*Only in ADR and Agent Trace report*) The percentage of time the agent spent consulting other agents while on an inbound call.	Historical Agent Summary & Interval reports; ADR; Agent Trace report
Consulting	The number of agents currently consulting with another agent.	Snapshot/Site & Skills by Team views
CTQ	The number of agents currently consulting with another agent after initiating or answering a consult-to-queue request.	Snapshot/Site view

Parameter	Description	Report
Current State	The agent's current state. See the table on page 222 for a description of each state that can appear in this column. In Team and Skill views, If the current state is Idle, the idle code the agent selected is shown in parentheses (no code is shown if the agent has just logged in and has not selected an idle code).	Snapshot/Team, Skill, & Agent views
Disconnected Count	The number of calls that were connected to an agent, but that were then immediately disconnected within the Sudden Dsconnect threshold provisioned for the enterprise.	Historical Agent Summary & Agent Interval reports; ADR; Agent Trace report
Disconnected Hold Count	The number of times an inbound call was disconnected while the caller was on hold.	Snapshot/Agent view
DN	The dial number the agent used to log in to the Agent Desktop.	Snapshot/Team, Agent, & Skill views; ADR; Agent Trace report
Duration	The amount of time the agent was in the state.	Agent Trace Report
Final Logout Time	The date and time the agent logged out. This column appears only in agent-level summary reports.	Historical Agent Summary/Agent level
Hold	The number of agents in the Connected state who have placed the caller on hold.	Snapshot/Site view & Skills by Team view
Hold Time	The amount of time callers were on hold during the time interval.	Real-time Skills Interval by Team

Parameter	Description	Report
Idle	The number of times the agent went into the Idle state from a different state. Rest the cursor over a number in this column to display a pop-up showing the idle codes the agent entered and how many times each code was entered. **Note:** Because an agent can change the idle code while in the Idle state, the number of idle codes displayed in the pop-up can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email.	Snapshot/Team & Skill views
	The number of agents currently in the Idle state.	Snapshot/Site & Skills by Team views
	Count. The number of times an agent went into the Idle state. **Total Time.** The total amount of time agents spent in the Idle state. **Average Time.** (*Not available in ADR or Agent Trace report*) The average length of time agents were in the Idle state (Total Idle Time divided by Idle Count). **% Time.** (*Not available in Agent Summary and Interval reports*) The percentage of time the agent was in the Idle state.	Historical Agent Summary & Interval reports; ADR; Agent Trace report
	Count. The number of times the agent went into the Idle state from a different state. Rest the cursor over the number in this field to see the idle codes the agent entered and how many times each code was used. **Note:** Because an agent can change the idle code while in the Idle state, the number of idle codes can exceed the number of times the agent went into the Idle state. For example, an agent might move from Idle-Break to Idle-Email. **Total Time.** The total amount of time the agent spent in the Idle state.	Snapshot/Agent view
Idle Time	The amount of time agents were in the Idle state during the time interval.	Real-time Agent Interval reports
In Outdial	The number of agents who are connected to or are wrapping up an outdial call.	Snapshot/Site view & Skills by Team view
	The number of times the agent was connected to or was wrapping up an outdial call.	Snapshot/Team view
In Time	The time the agent entered the state.	Agent Trace report

Parameter	Description	Report
Inbound	**Reserved Time.** The amount of time agents were in the Reserved state, during which incoming calls were ringing but had not yet been answered.	Real-time Agent Interval reports
	Answered Count. The number of inbound calls that were answered by an agent during the time interval.	
	Talk Time. The amount of time agents were talking on inbound calls during the time interval.	
	Hold Time. The amount of time inbound calls were on hold during the time interval.	
	Connected Time. The amount of time inbound calls were connected to an agent during the time interval (inbound talk time plus inbound hold time).	
	Wrap Up Time. The amount of time agents spent in the Wrap-up state after an inbound call during the time interval.	
	Average Connected Time. Inbound connected time divided by the number of inbound calls that were connected during the time interval.	
	Average Handle Time. The average length of time spent handling an inbound call (inbound connected time plus inbound wrap-up time, divided by number of inbound calls).	
Inbound Average Handle Time	The average length of time spent handling a call (total connected time plus total hold time and total wrap-up time, divided by connected count).	Snapshot/Agent view
Inbound Avg Handle Time	The average length of time spent handling an inbound call (Total Inbound Connected Time plus Total Wrap Up Time, divided by Inbound Connected Count).	Historical Agent Summary & Interval reports; ADR; Agent Trace report

Parameter	Description	Report
Inbound Connected	**Hold Count.** The number of times an agent put an inbound caller on hold. **Connected Count.** The number of inbound calls that were connected to an agent. **Total Talk Time.** The total amount of time an agent was talking with a caller. **Total Hold Time.** The total amount of time inbound calls were on hold. **Total Time.** The total amount of time agents were connected to inbound calls. **Average Hold Time.** (*Not in ADR or Snapshot/ Agent view or Agent Trace report)* The average hold time for inbound calls (Total Hold Time divided by Hold Count). **Average Time.** (*Not in ADR or Snapshot/Agent view*) The average inbound connected time (Total Time divided by Connected Count). **% Talk Time.** (*Only in ADR and Agent Trace report*) The percentage of inbound connected time the agent was talking with the caller. **% Hold Time.** (*Only in ADR*) The percentage of inbound connected time the caller was on hold. **% Time.** (*Only in ADR*) The percentage of time the agent was connected to an inbound call.	Historical Agent Summary & Interval reports; ADR; Snapshot/ Agent view; Agent Trace report
Inbound Consult	**Count.** The number of times an agent answered a consult request plus the number of times an agent consulted other agents. **Total Time.** Total Consult Answer Time plus Total Consult Request Time.	Snapshot/Agent view
Inbound Consult Answer	**Count.** The number of times an agent answered a consult request from another agent handling an inbound call. **Total Time.** The total amount of time an agent spent answering consult requests from agents handling inbound calls.	Snapshot/Agent view
Inbound Consult Request	**Count.** The number of times an agent sent a consult request to another agent during an inbound call. **Total Time.** The total amount of time an agent spent consulting other agents during inbound calls.	Snapshot/Agent view
Inbound CTQ	**Count.** Inbound CTQ Answer Count plus Inbound CTQ Request Count. **Total Time.** Total Inbound CTQ Answer Time plus Total Inbound CTQ Request Time.	Snapshot/Agent view

Parameter	Description	Report
Inbound CTQ Answer	**Count.** The number of times an agent answered a consult-to-queue request from an agent who was handling an inbound call. **Total Time.** The total amount of time an agent spent answering consult-to-queue requests from agents handling inbound calls.	Snapshot/Agent view; Historical Agent Summary & Interval reports; ADR
Inbound CTQ Request	**Count.** The number of times an agent initiated a consult to queue while handling an inbound call. **Total Time.** The total amount of time between when an agent initiated consult-to-queue requests while handling inbound calls and when the consultations ended.	Snapshot/Agent view; Historical Agent Summary & Interval reports; ADR
Inbound Reserved	**Count.**(*Not in ADR or Agent Trace report*) The number of times an agent went into the Inbound Reserved state, during which a call is coming in to an agent's station but has not yet been answered. **Total Time.** The total amount of time an agent spent in the Reserved state. **Average Time.** The average length of time agents were in the Inbound Reserved state (Total Available Time divided by Available Count). **% Time.** (*Only in ADR and Agent Trace report*) The percentage of time the agent was in the Inbound Reserved state.	Snapshot/Agent view
Inbound Transfers	The number of inbound calls the agent transferred to another agent, queue, or number.	Snapshot/Agent view
Inbound Wrap Up	**Count.** The number of times an went into the Wrap-up state after an inbound call. In the Snapshot/Agent view, you can rest the cursor over a number in this column to see the wrap-up codes the agent entered and how many times each code was used. **Total Time.** The total amount of time an agent spent in the Wrap-up state after an inbound call. **Average Time.** (*Not in ADR, Agent Trace report, or Snapshot/Agent view*) The average length of time agents were in the Wrap-up state after an inbound call (Total Wrap Up Time divided by Wrap Up Count). **% Time.** (*Only in ADR and Agent Trace report*) The percentage of time the agent was in the Wrap-up state after an inbound call.	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Snapshot/Agent view
Initial Login Time	The date and time the agent logged in.	Historical Agent Summary/Agent level

Parameter	Description	Report
Login Count	Total number of times an agent logged in on that day. Appears only if **Agents** is selected in the **Display Results By** drop-down list.	Historical Agent Summary/Agent level
Login Time	The date and time the agent logged in to the Agent Desktop.	Snapshot/Team, Agent, & Skill views; ADR; Agent Trace report
Logout Time	The date and time the agent logged out of the Agent Desktop.	ADR; Agent Trace report
Not Responding	The number of agents currently in the Not Responding state.	Snapshot/Site & Skills by Team views
	Count. The number of times an agent was in the Not Responding state. **Total Time.** The total amount of time an agent spent in the Not Responding state. **Average Time.** (*Not in ADR or Snapshot/Agent view or Agent Trace report*) The average length of time agents were in the Not Responding state (Total Not Responding Time divided by Not Responding Count). **% Time.** (*Only in ADR and Agent Trace report*) The percentage of time the agent was in the Not Responding state.	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Snapshot/Agent view
Not Responding Time	The amount of time agents spent in the Not Responding state during the time interval.	Real-time Agent Interval reports
Number of Calls	The number of inbound calls that were connected to the site or team during the time interval.	Real-time Skills Interval by Team
Occupancy	The measure of time the agent spent on calls compared to available and idle time, calculated by dividing total connected time (inbound connected time plus outdial connected time) plus total wrap up time (inbound wrap up time plus outdial wrap up time) by staff hours.	Snapshot/Agent view; Real-time Agent Interval reports; Historical Agent Summary, Agent Interval, ADR, & Agent Trace report
	The measure of time the agent spent on calls compared to available and idle time, calculated by dividing inbound connected time plus inbound wrap up time by staff hours.	Real-time Skills Interval by Team
Out Time	The time the agent left the state.	Agent Trace report

Parameter	Description	Report
Outdial	**Attempted.** The number of calls that agents initiated during the time interval.	Real-time Agent Interval reports
	Connected. The number of outdial calls that were connected to an agent during the time interval.	
	Reserved Time. The amount of time agents were in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet.	
	Talk Time. The amount of time agents were talking on outdial calls during the time interval.	
	Hold Time. The amount of time outdial calls were on hold during the time interval.	
	Connected Time. The amount of time outdial calls were connected to an agent during the time interval (outdial talk time plus outdial hold time).	
	Average Connected Time. Outdial connected time divided by the number of outdial calls that were connected during the time interval.	
	Wrap Up Time. The amount of time agents spent in the Wrap-up state after an outdial call during the time interval.	
	Average Handle Time. The average length of time spent handling an outdial call (outdial connected time plus outdial wrap up time, divided by number of outdial calls).	
Outdial Avg Handle Time	The average length of time spent handling an outdial call (Total Outdial Connected Time plus Total Outdial Wrap Up Time, divided by Outdial Connected Count).	Historical Agent Summary, Agent Interval, ADR, & Agent Trace report
Outdial Conference	The number of outdial calls the agent conferenced with another party.	Snapshot/Agent view

Parameter	Description	Report
Outdial Connected	**Attempted Count.** The number of times an agent attempted to make an outdial call. **Connected Count.** The number of outdial calls that were connected to an agent. **Hold Count.** The number of times an agent put an outdial call on hold. **Total Talk Time.** The total amount of time an agent was talking with a party on an outdial call. **Total Hold Time.** The total amount of time outdial calls were on hold. **Total Time.** The total amount of time agents were connected to outdial calls. **Average Hold Time.** (*Not in ADR, Agent Trace report, or Snapshot/Agent view*) The average hold time for outdial calls (Total Hold Time divided by Hold Count). **Average Time.** (*Not in ADR, Agent Trace report, or Snapshot/Agent view*) The average outdial connected time (Total Time divided by Connected Count).	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Snapshot/Agent view
Outdial Consult	**Count.** Outdial Consult Answer count plus Outdial Consult Request count.	Snapshot/Agent view
	Total Time. Total Outdial Consult Answer Time plus Total Outdial Consult Request Time.	
Outdial Consult Answer	**Count.** The number of times the agent answered a consult request from another agent who was on an outdial call.	Snapshot/Agent view
	Total Time. The amount of time the agent was consulted by another agent who was on an outdial call.	
Outdial Consult Request	**Count.** The number of times the agent consulted another agent while on an outdial call.	Snapshot/Agent view
	Total Time. The amount of time the agent consulted another agent during an outdial call.	
Outdial CTQ	**Count.** Outdial CTQ Answer Count plus Outdial CTQ Request Count. **Total Time.** Total Outdial CTQ Answer Time plus Total Outdial CTQ Request Time	Snapshot/Agent view
Outdial CTQ Answer	**Count.** The number of times an agent answered a consult-to-queue request from an agent who was handling an outdial call. **Total Time.** The total amount of time an agent spent answering consult-to-queue requests from agents handling outdial calls.	Snapshot/Agent view; Historical Agent Summary & Interval reports; ADR

Parameter	Description	Report
Outdial CTQ Request	**Count.** The number of times an agent initiated a consult to queue while handling an inbound call. **Total Time.** The total amount of time between when an agent initiated consult-to-queue requests while handling inbound calls and when the consultations ended.	Snapshot/Agent view; Historical Agent Summary & Interval reports; ADR
Outdial Reserved	**Count.** The number of times an agent was in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet. **Total Time.** The total amount of time an agent was in the Outdial Reserved state. **Average Time.** (*Not in ADR, Agent Trace report, or Snapshot/Agent view*) The average amount of time agents were in the Outdial Reserved state (Total Time divided by Count).	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Snapshot/Agent view
Outdial Transfers	The number of outdial calls the agent transferred to another agent, queue, or number.	Snapshot/Agent view
Outdial Wrap Up	**Count.** The number of times an agent went into the Wrap-up state after an outdial call. **Total Time.** The total amount of time an agent spent in the Wrap-up state after an outdial call. **Average Time.** (*Not in ADR, Agent Trace report, or Snapshot/Agent view*) The average length of time agents were in the Wrap-up state after an outdial call (Total Outdial Wrap Up Time divided by Outdial Wrap Up Count).	Historical Agent Summary & Interval reports; ADR; Agent Trace report; Snapshot/Agent view
Queue	If the agent is currently handling a call, the name of the queue that the call came in on.	Snapshot/Team, Agent, & Skill views

Parameter	Description	Report
Reason	The reason the agent logged out. For example: • **Desktop browser closed.** The browser window in which the Agent Desktop application was running was closed while the agent was logged in. • **LoggingInAnotherInstance.** The system logged the agent out because the agent logged in to another instance of the Agent Desktop. • **Lost network connection.** The agent was logged out because of a network interruption that exceeded two minutes (unless a different timeout is specified for your system). • **Normal logout.** The agent clicked the **Log Out** button in the Agent Desktop window. • **Operational logout.** The system logged the agent out in response to a command initiated by Cisco CJP Operations or Technical Support. • **Supervisory logout.** The supervisor logged the agent out. Other reasons can occasionally occur.	ADR; Agent Trace report
Reserved	The number of agents currently in the Reserved state, during which a call is coming in but has not yet been answered.	Snapshot/Site view & Skills by Team view
	The number of agents in the Reserved state who possess the skill.	Snapshot/Skill view
Site	The name of a site. If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the a collapse arrow ( ) or expand arrow ( ) to the left of a team name to collapse or expand the data grouped by channel type. In the Site view of a current snapshot agent report, you can do the following:> • Click a collapse arrow ( ) or expand arrow ( ) next to a site name to collapse or expand the list of logged-in teams at the site. • Click the name of a team to drill-down to the Team view for that team.	Snapshot/Site view; Real-time Agent Interval reports (except Agent-level)
	The site where the team the agent was handling calls for is located.	ADR; Agent Trace report

Parameter	Description	Report
Skill	The name of the skill. In the Skill view of the current snapshot agent report you can do the following: • Click a collapse arrow ( ) or expand arrow ( ) next to a skill name to collapse or expand the list of logged-in agents who possess the skill. • Click the name of an agent to drill-down to the Agent view for that agent. • If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the collapse or expand arrow to the left of an agent name to collapse or expand the data grouped by channel type.	Snapshot/Skill view; Real-time Skills Interval by Team
Staff Hours	The amount of time the agent has been logged in.	Snapshot/Team, Agent, & Skill views
	The amount of time the agent was logged in during the time interval.	Real-time Agent Interval reports & Skills Interval by Team
	The total amount of time agents were logged in.	Historical Agent Summary & Interval reports
	The amount of time the agent was logged in during each login session.	ADR; Agent Trace report

Parameter	Description	Report
State	The time the agent logged in and logged out and each state the agent was in during the login session: • **Available.** The agent was available and waiting for calls. • **Conference.** The agent conferenced a call with another party. • **Consult-Answer.** The agent answered a consult request from another agent. • **Consult-Request.** The agent initiated a consultation with another agent. • **Idle.** The phone rang but was not answered within a specified period of time. • **Not Responding.** The agent's phone rang but the agent did not answer within a specified period of time. • **Hold.** The agent placed a connected call on hold. • **Talk**. The agent was talking on an inbound call. **Wrap Up.** The call ended but the agent was not ready for the next call**.**	Agent Trace report
Talk	The number of agents in the Connected state who are currently talking with a caller.	Snapshot/Site & Skills by Team views
Talk Time	The amount of time agents were talking with callers during the time interval.	Real-time Skills Interval by Team

Parameter	Description	Report
Team	The name of a team in the report. In the Team view and Skills by Team view of a current snapshot agent report you can do the following: • Click a collapse arrow ( ) or expand arrow ( ) next to a team name to collapse or expand the list of logged-in agents on the team. • If your enterprise uses the Multimedia feature and the report includes more than one media channel, you can click the a collapse or expand arrow to the left of an agent name to collapse or expand the data grouped by channel type. In the Team view, you can click the name of an agent to drill-down to the Agent view for that agent.	Snapshot/Team view & Skills by Team view; Real-time Agent Interval report/ Team & Skills by Team level
	The team the agent was handling calls for.	ADR; Agent Trace report
Time in Current State	The amount of time the agent has been in the current state.	Snapshot/Team, Agent, & Skill views
Total Calls	Inbound Answered calls plus Outdial Attempted calls.	Real-time Agent Interval reports
Total Logged In	The number of agents currently logged in or, in the Skill view, the number of agents currently logged in who possess the skill	Snapshot/Site, Team, Skill, & Skills by Team views
Channels Logged In	The number of media channels to which agents are currently logged in. Appears only if your enterprise uses the Multimedia feature.	Snapshot/Site, Team, Skill, & Skills by Team views
Wrap Up	The number of agents currently in the Wrap-up state.	Snapshot/Site & Skills by Team view
Wrap Up Time	The amount of time agents spent in the Wrap-up state after an inbound call during the time interval.	Real-time Skills Interval by Team

Historical Skill Report Parameters

The parameters available in CJP historical Skills by Queues reports are described in the following table. Asterisks (*) mark parameters that are available only in a skill summary report, which you can display by drilling down on a skill name in a Skills by Queue report.

Parameter	Description	
% Calls Matched	The percentage of calls for which the initial value of the skill required by the call was equal to the final value when the call was distributed to an agent. (Matched Calls * 100) / (Connected + Abandoned + Reclassified)	Skills by Queue
Abandoned	The number of calls with this skill requirement that were abandoned during the report interval.	Skills by Queue
Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for this skill.	Skills by Queue
Avg Handle Time	The average length of time spent handling a call with this skill requirement (total connected time plus total wrap-up time, divided by calls handled).	Skills by Queue & Skills by Agents
Connected	The number of calls with this skill requirement that were connected during the report interval.	Skills by Queue & Skills by Agents
Connected within SL	The number of calls with this skill requirement that were connected within the Service Level threshold provisioned for this skill.	Skills by Queue & Skills by Agents
Final Operand*	The skill operand type that was assigned to the call when it was distributed to an agent with a matching skill.	Skills by Queue
Final Value*	The value of the skill requirement assigned to the call when the call was distributed to an agent.	Skills by Queue
Initial Operand*	The skill operand type that was assigned to the call when it was distributed to the queue. Possible values: • **eq** (equal to) • **neq** (not equal to) • **gte** (greater than or equal to) • **lte** (less than or equal to)	Skills by Queue
Initial Value*	The value of the skill requirement assigned to the call when it arrived in the queue.	Skills by Queue

Parameter	Description	
Operand	The skill operand type that was assigned to the call when it was distributed to the agent. Possible values: • **eq** (equal to) • **neq** (not equal to) • **gte** (greater than or equal to) • **lte** (less than or equal to)	Skills by Agents
Reclassified	The number of calls with this skill requirement that were transferred from the queue by the system.	Skills by Queue
Reclassified within SL	The number of calls with this skill requirement that were transferred from the queue by the system within the Service Level threshold provisioned for the skill.	Skills by Queue
Skill	The name of a skill. In a Skills by Queue report, you can click an entry in this column to drill down to view daily activity for the month (from a monthly summary) or to view half-hourly data for a day (from a daily summary).	Skills by Queue Skills by Agents
Total	The total number of calls.	Skills by Queue
Value	The value of the skill requirement assigned to the call when the call was distributed to the agent.	Skills by Agents

Historical Threshold Alerts Report Parameters

If your enterprise uses the threshold alerts feature and your user profile authorizes you to view alerts, you can use the controls on the Threshold Alerts page of the Historical Reports module to display details about threshold alerts that were triggered between midnight of the current day and three months ago. Available parameters are described in the following table.

Parameter	Description
Acknowledged	Whether or not a supervisor acknowledged the alert.
Acknowledged Time	The time the alert was acknowledged.
Actual Value	The actual value that triggered the alert.
Archived	Whether or not a supervisor archived the alert.
Comments	Optional comments, if any, entered by the supervisor who acknowledged the alert.
Metric	The metric that the threshold is associated with.

Parameter	Description
Operand	> (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to) = (equal to)
Supervisor	The name of the supervisor who acknowledged the alert.
Time	The date and time that the threshold alert was triggered
Trigger Interval	The number of seconds specified in the threshold rule as the interval during which the system should generate only one alert for the threshold rule check.
Trigger Value	The value that the threshold rule defined as the trigger.

Usage Metrics Report Parameters

Parameters available in the Usage Metrics Report are described in the following table.

Column	Description
Calls Duration (min)	The total amount of time between when inbound calls arrived or outdial calls were placed and when they were terminated.
Inbound	**Total Calls.** The total number of inbound calls. **Connected Calls.** The number of inbound calls that were connected to an agent. **IVR Duration (min).** The number of minutes during which calls were in the IVR system. **Queue Duration (sec).** The number of seconds during which calls were in a queue. **Talk Time (min).** The number of minutes during which agents were talking with callers. **Hold Time (min).** The number of minutes during which inbound calls were on hold.
Month	The month during which the call activity occurred.
Outdial	**Total Calls.** The total number of outdial calls. **Connected Calls.** The number of outdial calls that were connected to an agent. **Talk Time (min).** The number of minutes during which an agent was talking with a party on an outdial call. **Hold Time (min).** The number of minutes during which outdial calls were on hold.
Recorded Calls	The number of calls that were recorded.
Total Calls	The total number of inbound and outdial calls.

Glossary

abandoned call. A phone call that was in the system longer than the predefined Short Call threshold provisioned for the enterprise, but that was terminated before being distributed to a destination site. See also *Short Call threshold*. Contrast with *short call*.

ACD. See *automatic call distributor (ACD)*.

ACT (average connected time). The average amount of time callers were connected to an agent.

ADR. See *agent detail record (ADR)*.

agent. A person who answers customer calls; also referred to as a *customer service representative*.

agent-based team. A team that has a specific number of agents assigned to it. These agents use the CJP Agent Desktop to interface with the CJP system. See also *CJP Agent Desktop*. Contrast with *capacity-based team*.

Agent Desktop. See *CJP Agent Desktop*.

agent detail record (ADR). A record representing details about an agent's activities during an agent session (that is, the time interval between when the agent logged in and logged out).

agent profile. A group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies permission levels relating to queue transfers, agent consults and transfers ("buddy teams"), wrap-up and idle codes, wrap-up time-out values, and agent auto-available.

ANI. See *Automatic Number Identification (ANI)*.

answered call. A call that was routed from the queue to an agent or available resource and was answered by the agent or connected to a resource.

ASA. See *average speed of answer (ASA)*.

automatic call distributor (ACD). A system or application software program that serves to route incoming calls to the most available and appropriate agent or resource according to customer-defined routing requirements.

Automatic Number Identification (ANI). A system utilized by telephone companies to identify the phone number of a calling subscriber.

auxiliary codes. Idle and wrap-up codes that agents can select while using the CJP Agent Desktop. See also *idle code*, *wrap-up code*.

Available state. An agent state indicating that the agent is ready to take calls.

average speed of answer (ASA). The average amount of time callers waited in queue before being connected to an agent.

barge in. To join a call while monitoring or coaching an agent in order participate in the conversation between the agent and the customer.

call-associated data (CAD) variable. A named variable provisioned for the enterprise that can be used in a call control script to collect data entered either by a caller or an agent. CAD values are stored in the cumulative call detail records that CJP Management Portal users can display and export to Microsoft Excel or .csv files.

call control script. A set of instructions for controlling the flow of calls through the CJP system. Call control scripts are assigned to routing strategies.

call detail record (CDR). A record representing the history of a call within an entry point or queue. An entry point CDR stores details about the call from the time it arrived at the entry point—either as a new, external call or as a call transferred from another entry point or queue—until it left the underlying queues either by terminating or by being transferred out of a queue to another entry point. A queue CDR stores information about the call from the time it entered the queue until it was either terminated or transferred out of the queue. A queue CDR can have multiple legs, which are represented by segment detail records (SDRs). See also *segment detail record (SDR)*.

capacity-based team. A team that does not have specific agents assigned to it, and the agents do not use the CJP Agent Desktop. For example, an outsourcer might have teams that use a PBX or an ACD to handle calls. A capacity-based team might be used to represent a voice mailbox or an agent group that is not managed by the CJP system. The capacity of such a team is determined by the Capacity setting provisioned for it, which can be overwritten by team capacity strategies defined in the CJP Routing Strategy module available from the CJP Management Portal. See also *CJP Agent Desktop*. Contrast with *agent-based team*.

CCDR. See *cumulative call detail record (CCDR)*.

CDR. See *call detail record (CDR)*.

CJP Agent Desktop. A browser-based application for handling customer interactions on the agent's workstation. Using the Agent Desktop and any telephony device including traditional TDM, mobile or soft IP-based phones, agents have access to a full suite of contact center applications.

CJP Management Portal. The Web-based user interface that provides authorized users with access to CJP features and functions.

CJP Scorecard Routing. A Cisco CJP offering that provides cross-ACD call routing. In Scorecard Routing, calls arriving at an entry point can be routed to queues across multiple ACDs. The queues receiving the calls can belong to CJP or non-CJP ACDs. Calls sent to an external ACD are distributed to agents by the external ACD. CJP uses proxy queues to track the call activity that occurs on those external ACD queues. See also *proxy queue*.

coach. To speak to the agent handling a call without being heard by the customer. Also known as *whisper coach*.

completed call. A call that ended during the report interval. This includes answered, disconnected, and abandoned calls, but not short calls or transferred calls.

Connected state. An agent state indicating that the agent is connected with a caller.

cross-ACD entry point. An entry point used in CJP Scorecard Routing. Calls that arrive at a cross-ACD entry point can be routed to queues across multiple ACDs. Calls sent to an external ACD are distributed to agents by the external ACD. See also *entry point*, *proxy queue*, *CJP Scorecard Routing*.

cumulative call detail record (CCDR). A record representing the complete life cycle of an external call, from the time it arrived in the CJP system until it was terminated. A CCDR can include one or more CDRs and SDRs. See also *call detail record (CDR)*, *segment detail record (SDR)*.

Dialed Number Identification Service (DNIS). A service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.

disconnected call. A call that was terminated within the predefined Sudden Disconnect threshold provisioned for the enterprise after being distributed to a destination site. See also *Sudden Disconnect threshold*.

DN. Dial number, the number that is dialed to initiate a call.

DNIS. See *Dialed Number Identification Service (DNIS)*.

enterprise. An organization that subscribes to the CJP service. Also referred to as the CJP *tenant*.

entry point. The initial landing place for customer calls on the CJP system. One or more toll-free or dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

handled call. A call that was terminated after reaching the destination site and exceeding the predefined Sudden Disconnect threshold provisioned for the enterprise. The total number of handled calls is determined by subtracting the number of disconnected calls from the number of answered calls. See also *answered call*, *disconnected call*, *enterprise*.

idle code. A value that an agent selects while using the CJP Agent Desktop to indicate why the agent is not available to take calls, such as *Lunch*, *Break*, or *Meeting*. See also *CJP Agent Desktop*.

Idle state. An agent state indicating that the agent is logged in but not yet ready to take customer calls.

IVR. Interactive voice response.

IVR call. A call that was successfully put through to the IVR system.

IVR time. The cumulative amount of time calls were in the IVR system, waiting to be handled.

Management Portal. See *CJP Management Portal*.

MED. Minimum expected delay, a value that represents the smallest expected time interval between the routing of a call to a queue and answering of the call by an agent resource. The routing engine calculates the MED of each queue based on the depth of the queue and the average handle time (AHA) during the most recent time interval.

Midpoint Call Management® gateway. CJP Communication's centralized control point for managing and monitoring calls across a heterogeneous contact center environment. The CJP solution creates a virtual point for visibility and control, enabling enterprises to remotely manage their global contact center queues while providing improved bandwidth usage. It also provides a view into real-time and historical performance system wide, allowing service levels to be optimized across sites.

multimedia profile. A group of settings that specify the types and number of contacts an agent can handle concurrently. Multimedia profiles can be assigned to sites, teams, or individual agents. When Multimedia is enabled, each agent-based team at a site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team's profile unless the agent is assigned a different multimedia profile.

Not Responding state. An agent state indicating that the agent's phone rang but was not answered within a predefined period of time.

outdial call. A call made from the CJP Agent Desktop by entering a phone number in the *Start a new call* field.

Outdial Reserved state. An agent state indicating that the agent has initiated an outdial call, but the call is not connected yet.

overflow number. A destination phone number, provisioned for the queue, to which a call is sent if it has been queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent.

proxy queue. A queue that represents an external ACD. In CJP Scorecard Routing, calls that are sent to an external ACD are distributed to agents by the external ACD. CJP uses proxy queues to track the call activity occurring on the external ACD queues. There is no agent visibility or agent reporting for proxy queues. See also *CJP Scorecard Routing*.

queue. A holding place for calls while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agents. See also *entry point*.

queued call. A call that has been queued to music-on-hold or customer messaging information while waiting to be sent to a destination site.

Recording Management. A CJP module that can be used to search for and play audio files recorded through the optional CJP Call Recording feature.

Reserved state. An agent state indicating that a call is coming through to the agent's station.

SBR. See *skills-based routing*.

Scorecard Routing. See *CJP Scorecard Routing*.

SDR. See *segment detail record (SDR)*.

segment detail record (SDR). A record representing one leg of a call. When an agent transfers a call to another agent, two SDRs are created—one for each leg of the call. See also *call detail record (CDR)*, *cumulative call detail record (CCDR)*.

service level. The percentage of calls for a queue or skill that were distributed to a site and were answered by agents within the predefined Service Level threshold provisioned for the queue or skill. Abandoned calls are included in service-level calculations. See also *skill*.

Service Level threshold. A threshold provisioned for a queue or skill that is used to calculate service level values. If a call is completed within the time interval set for this threshold, it is considered to have been handled within service level. See also *service level*.

short call. A call that was terminated within the predefined Short Call threshold provisioned for the enterprise before being distributed to a destination site. See also *Short Call threshold*. Contrast with *abandoned call*.

Short Call threshold. The time interval, provisioned for the enterprise, that determines whether a call is considered *short* or *abandoned*. Calls that are terminated before being distributed to a destination site but within this time threshold are counted as short rather than abandoned. The default is 5 seconds. See also *abandoned call*, *short call*.

site. A physical contact center location under the control of the enterprise. For example, an enterprise named *Acme* might have sites in Chicago, Manila, and Bangalore.

skill. An area of agent expertise, such as language fluency or product expertise, that can be used in skills-based routing to determine which calls an agent can receive. See also *skill profile*, *skills-based routing*.

skill profile. A set of skills, each with an assigned value, that can be assigned to a team or an individual agent. If a skill profile is assigned to a team, each agent logged in to that team is associated with that skill profile unless the agent is assigned a specific skill profile. See also *skill*, *skills-based routing*.

skills-based routing. An optional CJP feature that matches the needs of callers with agents who have the skills to best meet those needs. When calls arrive at an entry point, they are classified into subsets that can be routed only to agents who possess a requisite set of skills, such as language fluency or product expertise. See also *skill*, *skill profile*.

Sudden Disconnect threshold. The time interval, provisioned for the enterprise, that determines whether a call is considered *handled* or was terminated so quickly as to possibly indicate an issue with connectivity or agent behavior. A call that is terminated after being distributed to a destination site, but within this time threshold, is considered to be a *disconnected* call.

talk time. The time interval during which the agent is talking to the caller. This does not include time the call is on hold.

team. The logical entity responsible for handling calls to a given queue. An agent can be assigned to multiple teams for selection; however, an agent can log in to only one team at a time. See also *queue*.

tenant. An enterprise that subscribes to the CJP service.

terminated call. A call that ends generally either because the caller or agent has hung up the connection.

ticker. The scrolling text area at the top of the CJP real-time pages. The ticker can be customized to display the key performance indicators that are most important to the enterprise’s operations.

user. A person who accesses the CJP service, typically a contact center manager, telecom manager, customer care executive, or other representative of the enterprise.

UTC. Coordinated Universal Time. Also known as *Universal Time Coordinate*. The standard time common throughout world, UTC is essentially the same as Greenwich Mean Time.

virtual team. A holding place for customer and outdial calls. There are six types of virtual teams—entry points, queues, outdial entry points, outdial queues, cross-ACD entry points, and proxy queues. See also *entry point*, *queue*, *cross-ACD entry point*, *proxy queue*.

work type. A value assigned to idle or wrap-up codes and used to group the codes in auxiliary reports. See also *idle code*, *wrap-up code*.

wrap-up code. A value that an agent selects while using the CJP Agent Desktop to indicate information about the disposition of each call after it ends—for example, *Sale*, *Transferred*, *Case Completed*. See also *CJP Agent Desktop*.

Wrap-up state. An agent state indicating that a call has ended, but the agent is not ready for the next call, typically because the agent is entering a wrap-up code or performing other after-call tasks.

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