Automatic Call Distribution

MIS User Guide

UCLA INFORMATION TECHNOLOGY SERVICES
Services of the ACD MIS

The Management Information System (MIS) provides real-time and historical data for UCLA organizations that handle inbound telephone calls using the Automatic Call Distribution (ACD) system. It helps organizations service their customers as cost effectively as possible while meeting their service objectives.

The ACD MIS remote terminal continuously receives data directly from the Information Technology Services’ VU-ACD/100 Host system. ACD group and agent activity is recorded and displayed in real-time to meet the immediate and changing needs of a call center. Decisions affecting staffing and ACD configuration can be made frequently throughout the workday based on how the call center is performing.

ACD MIS data is stored in the IT Services VU-ACD/100 Host for future retrieval by way of formatted reports. Up to six months of data can be retrieved from the remote terminal. Historical reports form the basis for long term management of staffing levels and system settings.

About this User Guide

This guide describes ACD MIS remote terminal features and functions offered by IT Services to support departmental supervisors and managers with system management. Some features described in this guide may not apply to your specific application. For instructions on the use of ACD telephone equipment, refer to the IT Services ACD Supervisor Telephone User Guide.

For detailed information on the services and features offered with the ACD MIS remote terminal, refer to the Perimeter Technology VU-ACD/100 For Windows user guides available by using the help function or by the CD-ROM provided by IT Services at the time of system installation. Each section of this guide has the applicable Perimeter Technology user guide name referenced in the section header.

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System Access

A user name and password is required to access the ACD MIS remote terminal data and to establish a connection with the IT Services ACD MIS Host. To establish a connection, launch the ACD MIS software that is accessed from the Start menu or desktop icon. The connection to the IT Services ACD MIS Host is automatic when any ACD MIS program is launched. Before you turn the power off on the remote terminal computer, logout of the ACD MIS.

USER LOGON

The user name is predetermined by IT Services and provided in training. Both the user name and password is case sensitive. If you have forgotten your user name or password, please contact your designated application specialist or consultant.

1. Click Start button
2. Position mouse pointer over Programs, then VU-ACD 100 for Windows, and then Real-Time Display
3. Click on Real-Time Display to launch application; VU ACD/100 for Windows Logon window appears
4. Enter your user name and password, then click OK

USER LOGOUT

Logout is performed from the Real-Time Display window. It is not required unless instructed to do so by IT Services or when you turn the power off on the remote terminal computer.

1. Select Main Menu, then click on VU-ACD Logout
2. Click OK in dialog box to confirm
Window and Screen Components

Refer to the diagram below to identify the window and screen components discussed below.

- **Agent Activity Window** - this is the lower window that displays data boxes and color histograms for detailed, real-time tracking of agent activity by ACD group.
- **Application Control Menu** - allows you to manipulate the application window, changing the size and position.
- **Close Button** - closes the window or selection.
- **Header Button** - located at the top of most panes (columns) within a window. These are active buttons that identify the information found in each pane. In some situations, clicking on the button sorts the data.
- **Maximize Button** - fills all available space on the screen within the application window.
- **Menu Bar** - menu items that are accessed by the mouse or underlined letter using the keyboard.
- **Minimize Button** - reduces the application to a button in the taskbar located at the bottom of the screen.
- **Scroll Bar** - a gray horizontal or vertical bar that enables the mouse to scroll up and down the screen. A scroll box within the bar shows the current display’s position relative to the screen.
- **Status Bar** - shows information at the bottom of the main window about the menu option selected, the date and time, and the name of the program.
- **System Time and Date** - displays time and date from the CTS ACD MIS Host system.
- **Toolbars** - there are three types of toolbars: Alarm, Main, and Remote Terminal (RT). Toolbars are a bar containing icon buttons for mouse access to features and functions or to view alarm activity.
- **Window Title Bars** - identifies the window that is open. When highlighted, it indicates that the window is active. It can also be used to move the window. Call Queue Parameters
Screen Layouts

The layout of standard window screens is set to a default configuration each time you launch the ACD MIS Real-Time Display. The layout can be changed and personalized using the Window menu. Up to 24 display windows can be opened at any given time. You can choose one of three configurations available for arranging windows. A new configuration must be saved as a screen layout otherwise it will revert to the default setting at the next logon.

The Real-Time Display window can be sized, moved, and reduced down to a button on the task bar. You can also minimize the ACD MIS program to open other applications on your computer. Each user can configure the content and appearance of the Real-Time Display to include the content and sequence of data box items and to adjust window sizes.

CASCADE
Arranges the open windows into a stack with each window’s title bar visible.

HORIZONTALLY
Arranges open windows across the screen with each window receiving equal space.

VERTICALLY
Arranges open windows up and down the screen with each window receiving equal space.
SAVE NEW SCREEN LAYOUT
1. Make desired configurations to screens
2. Click Screen Layouts on Menu Bar, then select Save Screen Layout; Save Screen Layout window appears
3. Enter a screen name in Screen Layout Name field, then click OK; layout is saved

OPEN EXISTING SCREEN LAYOUT
1. Click Screen Layouts on Menu Bar, then select Open Screen Layout; Open Screen Layout window appears
2. Select layout name you wish to open, then click OK; layout opens

REMOVE SCREEN LAYOUT
1. Click Screen Layouts on Menu Bar, then select Remove Screen Layout; Remove Screen Layout window appears
2. Select layout name you wish to delete, then click OK; layout is removed
Toolbars offer quick access to frequently used features and functions, and let you view alarm conditions. The Main and Real-Time (RT) toolbars offer a row of icon buttons that allow single click access to menu items; just click on the toolbar icon button for the feature or function you wish to launch. The Alarm Toolbar is used to view alarm conditions set for queue parameters, agent positions, and emergency feature keys. For more information on Alarms and the Alarm Toolbar settings, refer to page 138 of the System Configuration section.

Toolbars can be hidden or moved. To view the function of a given toolbar, position your mouse pointer over the toolbar icon. You cannot use the keyboard to select toolbar options.

HIDE A TOOLBAR
1. Click View on Menu Bar
2. Click on the toolbar name you wish to hide; toolbar disappears from screen

VIEW A TOOLBAR
1. Click View on Menu Bar
2. Click on toolbar name you wish to view; toolbar appears on screen

MOVE A TOOLBAR
1. Click on toolbar and drag it to new position, then release

MAIN TOOLBAR
Contains buttons representing file handling, screen appearance and display, and access to other ACD MIS programs.

MAIN TOOLBAR BUTTONS
- Open – access to main menu programs
- Save
- Print
- Add – adds a field to the bottom of the list or window
- Remove – deletes the selected item
- Promote Row – moves selected row up one level
- Demote Row – moves selected row down one level
- Real-Time Display
- Reports
- Configuration (System Configuration)
- Load Management
- RC/V – not applicable to UCLA and IT Services
- Logout
- Help
Remote Terminal Operation

Real-Time (RT) Toolbar

Contains buttons representing screen appearance, group monitoring, agent activity, and agent details.

RT (REAL-TIME) TOOLBAR BUTTONS

- **3-D Format** – histogram view for data bars within the Queue and Agent Activity windows
- **Select Groups** – to select groups to display in Queue Activity window
- **Subgroups** – not applicable to UCLA and IT Services
- **Monitor Groups** – to view or hide monitor groups
- **PDN and SDN Toggle** – toggles between Primary Directory Number and Secondary Directory Number call data in the Agent Activity window
- **SDN** – to view Secondary Directory Number calls in Agent Activity window
- **Out of Adherence** – not applicable to UCLA or IT Services
- **Adherence Schedules** – not applicable to UCLA or IT Services
- **Agent Detail** – to scroll through seven categories of detail [for more information refer to Agent Detail in Real-Time Display section of this guide]
- **Expanded Agent Detail** – offers detailed information about a selected agent [for more information refer to Agent Detail in Real-Time Display section of this guide]
- **Position Number** – sort agent details by agent position
- **Personal Identification Number (PIN)** – sort agent details by agent PIN

- **Agent Initials** – sort agent details by agent initials
- **Primary Directory Number (PDN) Duration** – sort agent details by ACD DN duration
- **Secondary Directory Number (SDN) Duration** – sort agent details by SDN duration
- **Closed Key Walkaway (CKW)** – sort agent details by walkaway code entered
- **Out of Adherence Duration** – not applicable to UCLA or IT Services
- **Agent Detail Table**
Help

Help is available to assist you with the use of features, functions, and color bar identification. It offers a variety of methods to access information. There are three basic methods available to access Help:
- Help menu on the Main Menu bar
- Help Toolbar
- F1 Key on keyboard

HELP MENU AND HELP TOOLBAR
The Help menu and toolbar provide direct access to help topics. You can search for information by selecting one of three tab options: Contents, Index, or Find.

Contents
Offers a broad approach to finding information by topic, similar to sorting through a table of contents. Through this option you can access the Perimeter Technology online manuals for the variety of program modules. To sort through available categories, click on the book icon for the desired subject. To view information, click on the Display button or double click on the desired subject name.

Index
Allows you to search for a specific item or concept. Type the item that you want to find in the top text box or scroll down the topics list. If you do not know the item’s spelling, type a few letters of the item and then look for the matching subjects displayed. To view information, click on the Display button or double click on the desired subject name.

Find
Searches for specific words and phrases by performing a keyword search. A help wizard will guide you through a sequence of dialog boxes to complete setup of the word database (for first time use). To find a keyword, type a word in the first text box and look for related words in the text window below. You can then display the subject by selecting its name and clicking the Display button.

F1 Key
Displays information pertinent to the window that is actively selected. For example, if the Queue Activity window in the Real-Time Display is displayed and the control menu is highlighted, pressing F1 displays information specific to that window.
Features Of The Real-Time Display

The Real-Time Display provides an up-to-the-minute performance evaluation of the call center, reflecting the current and accumulated activities of ACD groups during a single definable workday. Graphical data changes in real-time according to call center activity. The Real-Time Display appropriately delivers relevant detail and summary information that can be viewed in many different manners.

ACTIVITY DATA WINDOWS AND DATA BOXES
The Real-Time Display is composed of windows for Queue Activity and Agent Activity, located (by default) in the upper and lower portions of the Real-Time Display screen. Each activity area includes a data box (on the left) and a data window with color bars (on the right). The Queue Activity window displays information by ACD groups and associated incoming call queue activity. The Agent Activity window displays agent position activity within the ACD groups. The size and position of the Queue Activity and Agent Activity windows can be adjusted and saved using the Screen Layouts menu option.

COLOR BARS
Color bars provide immediate graphical indication of system performance. The color bar for each ACD group can incorporate several color segments. Each segment includes a number indicating how many resources or agent positions are in the condition represented by the background color.
Queue Activity Data Window

The Queue Activity Data Window is located in the upper-right portion of the Queue Activity window. It displays real-time ACD call and queue data for all ACD groups associated with your application. The SYSTEM option displays data for all ACD groups combined.

Up to six color bars can appear in the Queue Activity Data Window to represent the type of activity occurring within the ACD group. The number appearing within the color bar indicates the quantity of occurrences. A color chart is available in the Help menu. Some color activities may not apply to your application and therefore will not be displayed.

<table>
<thead>
<tr>
<th>COLOR CHART</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Green</strong> Available</td>
<td>Amount of available agents plus available queue slots to accept incoming ACD calls. This figure indicates your maximum call capacity.</td>
</tr>
<tr>
<td><strong>Light Blue</strong> Busy In</td>
<td>Amount of agents currently busy on ACD calls (that reside on the ACD DN).</td>
</tr>
<tr>
<td><strong>Red</strong> Physical Queue</td>
<td>Amount of ACD calls residing in the Physical Call Queue, waiting for the next available agent.</td>
</tr>
<tr>
<td><strong>Magenta</strong> Transfer Queue</td>
<td>Amount of ACD calls residing in the Call Transfer Queue. A call resides in this queue when it is transferred from one agent position to another, and the receiving agent position was busy; the call waits in the Call Transfer Queue until the agent becomes available.</td>
</tr>
<tr>
<td><strong>Yellow</strong> Overflow in Logical Queue</td>
<td>Amount of ACD calls residing in the Logical Call Queue of the destination ACD group. A call resides in this queue when the Time Delayed Overflow (TDO) timer has expired, which queues the waiting call in the Physical Call Queue (of the original source ACD group) and the Logical Call Queue of the destination ACD group, simultaneously. The call will be routed to the first available agent of either group.</td>
</tr>
<tr>
<td><strong>Dark Blue</strong> Overflow Out Physical Queue</td>
<td>Amount of ACD calls overflowing out of the Physical Call Queue because the Time Delayed Overflow (TDO) timer has expired and the call is now queued in the Physical Call Queue and in the Logical Call Queue, simultaneously.</td>
</tr>
</tbody>
</table>
Queue Activity Data Box

The Queue Activity Data Box is located in the upper-left portion of the Queue Activity window. It displays real-time ACD call and queue data for all ACD groups associated with your application. The SYSTEM option displays data for all ACD groups combined. The sequence of displayed data is configurable and can be saved as a Screen Layout for repeat viewing. Data is shown in two columns: DAY and INT (Interval).

- **DAY** – displays call activity data from the start of the ACD business day.
- **INT** – displays call activity data from the start of the calculation interval, which is set at 30-minutes (by default); the calculation interval can be modified under System Configuration, Time Values for Archive Data.

**QUEUE ACTIVITY DATA BOX FIELDS**

- **Abandoned** – total number of ACD calls that disconnected before being answered by the call queue or by an available agent.
- **Abandoned %** – percentage of the total number of ACD calls that disconnected before being answered by the call queue or by an available agent.
- **Abandon Post RAN (Abn PostRAN)** – number of ACD calls that were routed to the call queue and then disconnected after hearing the call queue recorded announcement.
- **Abandon Post RAN % (Abn PostRAN%)** – percentage of ACD calls that were routed to the call queue and then disconnected after hearing the call queue recorded announcement.
- **Abandon Pre RAN** – number of ACD calls that were routed to the call queue and then disconnected before hearing the call queue recorded announcement.
- **Abandon Pre RAN % (Abn PreRAN%)** – percentage of ACD calls that were routed to the call queue and then disconnected before hearing the call queue recorded announcement.
- **Answered** – total number of ACD calls answered by an agent. Excludes calls that were in the following conditions: Transfer, Transfer Recall, and Park Recall.
- **Average Speed of Answer (Avg Spd Ans)** – average number of seconds required for agents to answer incoming ACD calls.
- **Call Load** – total number of ACD calls presented to the Physical Call Queue or to an agent, plus the total number of calls that overflowed into the Logical Call Queue. This value represents the total number of calls that could have been answered by the ACD group.
- **Deflected** – total number of calls originally destined for the ACD group but were deflected (overflowed) to another destination because the Physical Call Queue was closed; this is due to either a full queue condition or the maximum wait time was exceeded.
Grade Of Service (GOS) – evaluates an ACD group’s efficiency by calculating the percentage of calls answered in less than or equal to a given period of seconds. The amount of seconds is set by the call center for ACD group calculations (Time Values For Archive Data). The ACD MIS divides ACD calls answered within this time value, by all ACD calls offered, to derive the GOS for each group.

Offered – indicates the total number of ACD calls that were answered by an agent or abandoned.

Overflow In – amount of ACD calls that overflowed into the Logical Call Queue of the designated ACD group. Does not include Transfer, Transfer Recall, or Park Recall calls.

Overflow Out – amount of ACD calls that overflowed out of the Physical Call Queue of the source ACD group because the Time Delayed Overflow (TDO) condition was initiated. Does not include Transfer, Transfer Recall, or Park Recall calls.

Presented – total number of ACD calls counted when first presented to the Physical Call Queue or to an agent. Includes answered calls, abandoned calls, and the overflow calls received by the group, but does not include the calls overflowed out to a different group.

Queue Delay-Expected – predicts the number of seconds the last call placed in queue must wait before being answered for both the physical and logical queue.

Queue Delay-Longest – identifies the number of seconds the oldest call has been in queue. A separate number appears for physical and logical queues.

Secondary In (Sec In) – amount of incoming calls received by agents not routed through the ACD group on Secondary Directory Numbers (SDN).

Secondary Out (Sec Out) – amount of incoming calls placed by agents on Secondary Directory Numbers (SDN).

Font Settings

Modify Queue Activity Data Box

You can choose which of the available data items will appear in the Queue Activity Data Box and determine the order of appearance. The configuration must be saved as a screen layout otherwise the data box configuration will revert to the default setting on the next logon.

ADD DATA BOX ITEMS

1. Click on Queue Activity window title bar
2. Click on ACD Group Name in Queue Activity Data Window for group that you wish to modify (i.e., Shipping)
3. Click anywhere within Queue Activity Data Box window
4. Click on Add button on Main Toolbar; a new row field appears at bottom of data box listing
5. Select item from drop-down list of choices to enter your addition
**CHANGE DATA BOX ITEMS**

1. Click on **Queue Activity** window title bar
2. Click on **ACD Group Name** in **Queue Activity Data Window** for group that you wish to modify
3. Click on item you wish to modify within **Queue Activity Data Box Window** (i.e., GOS); a drop-down arrow is displayed
4. Click on drop-down arrow to display list of choices, then click on data name to select item
5. To move an item up or down, click on item, then click on **Promote Row** or **Demote Row** button on **Main Toolbar**

**REMOVE DATA BOX ITEMS**

1. Click on **Queue Activity** window title bar
2. Click on **ACD Group Name** in **Queue Activity Data Window** for group that you wish to remove data box items from
3. Click on item you wish to remove in **Queue Activity Data Box window** (i.e., GOS); a drop-down arrow is displayed
4. Click on **Remove** button on **Main Toolbar**; item is removed
Agent Activity Data Window

The Agent Activity Data Window is located in the lower-right portion of the Agent Activity window. It displays real-time ACD system averages for agent activity, for all ACD groups associated with your application. The SYSTEM option displays data for all groups combined.

Up to eight color bars can appear in the Agent Activity Data Window to represent the type of activity occurring within the ACD group. The number appearing within the color bar indicates the quantity of occurrences. Figures in the Agent Activity Data Window can be displayed for the Primary Directory Number (PDN), which is also known as Primary Calls, ACD DN or Incalls key, and for the Secondary Directory Number (SDN) if a second line is assigned to ACD positions. A color chart is available from the Help menu. Some color activities may not apply to your application and therefore will not be displayed.

SDN AGENT ACTIVITY DATA WINDOW AND COLOR CHART

<table>
<thead>
<tr>
<th>Color</th>
<th>Activity Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green</td>
<td>Available Amount of agents currently available to accept incoming secondary calls.</td>
</tr>
<tr>
<td>Brown</td>
<td>Busy In Amount of agents currently busy on an incoming secondary call.</td>
</tr>
<tr>
<td>Pink</td>
<td>Busy In on Transfer Call Amount of agents currently busy on an outgoing secondary call.</td>
</tr>
</tbody>
</table>

Note: The SDN will not display activity if the number appears in multiple locations (is a MADN).

PDN AGENT ACTIVITY DATA WINDOW AND COLOR CHART

<table>
<thead>
<tr>
<th>Color</th>
<th>Activity Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown</td>
<td>Variable Wrap Up Amount of agents in wrap up. Wrap-up time is automatically imposed for a fixed interval by the ACD, to allow agents time to complete data entry prior to accepting another ACD call.</td>
</tr>
<tr>
<td>Dark Blue</td>
<td>Unavailable (Logged Out) Amount of agent positions not logged onto the ACD group (in a Make Busy state).</td>
</tr>
<tr>
<td>Gray</td>
<td>Not Ready Amount of agents logged onto the ACD group but not available to accept ACD calls.</td>
</tr>
<tr>
<td>Green</td>
<td>Available Amount of agents currently available to accept ACD calls (appearing on the ACD DN).</td>
</tr>
<tr>
<td>Light Blue</td>
<td>Busy In Amount of agents currently busy on ACD calls that were recalled from a transfer or parked state.</td>
</tr>
<tr>
<td>Magenta</td>
<td>Busy In on Recall Call Amount of agents currently busy on ACD calls that were recalled from a transfer or parked state.</td>
</tr>
<tr>
<td>Red</td>
<td>Forced Off Amount of agents forced off the ACD group for failing to answer an incoming ACD call.</td>
</tr>
<tr>
<td>Yellow</td>
<td>Busy In on Transfer Call Amount of agents currently busy on ACD calls transferred by another agent or system.</td>
</tr>
</tbody>
</table>
Agent Activity Data Box

The Agent Activity Data Box is located in the lower-left portion of the Agent Activity window. It displays real-time system averages for agents that reside in a selected ACD group or for all groups when SYSTEM is selected. The displayed data is based on the group name selected in the Agent Activity Data Window. The sequence of displayed data is configurable and can be saved as a Screen Layout for repeat viewing.

All percentages and averages are calculated based on the data calculation interval, which is set at 30-minutes (by default) and can be modified under System Configuration, Time Values for Archive Data. Data appears in two columns: Pri DN (Primary DN) and Sec DN (Secondary DN).

- **Pri DN** – displays data for call activity on the ACD DN.
- **Sec DN** – displays data for call activity on the Secondary Directory Number if one is assigned.

### Real-Time Display

**Group Selected**

"Service"

**ACD DN Activity** (Pri DN)

**Secondary DN Activity** (Sec DN)

---

<table>
<thead>
<tr>
<th>SERVICE</th>
<th>Pri DN</th>
<th>Sec DN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg Busy IN</td>
<td>18</td>
<td>14</td>
</tr>
<tr>
<td>Avg Busy OUT</td>
<td>0</td>
<td>50</td>
</tr>
<tr>
<td>Avg Wrap Up</td>
<td>133</td>
<td>Seconds</td>
</tr>
<tr>
<td>Avg Recall</td>
<td>0</td>
<td>Seconds</td>
</tr>
<tr>
<td>Avg Ready</td>
<td>9</td>
<td>Seconds</td>
</tr>
<tr>
<td>Occupancy</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>All Pos Busy</td>
<td>96%</td>
<td></td>
</tr>
<tr>
<td>Busy IN</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Busy OUT</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Wrap Up</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Var Wrap Up</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Recall</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Transfer</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

---

**Data Box Descriptions**

- **SERVICE**
  - SYSTEM
  - DIRECT S
  - W_COAST
  - SHIPPING
  - MIDWEST
  - CANADA
  - NE REGN
  - INT'L
  - TRAINING
  - SE REGN
AGENT ACTIVITY DATA BOX FIELDS

- **All Positions Busy (All Pos Busy)** – percentage of time all agents were logged on but none were available to take calls.
- **Average Busy In (Avg Busy In)** – average amount of time in seconds that agents spent (per incoming call) on an ACD DN (Pri DN) or Secondary Directory Number (Sec DN).
- **Average Busy Out (Avg Busy Out)** – average amount of time in seconds that agents spent on outgoing calls on a Secondary Directory Number (Sec DN).
- **Average Ready (Avg Ready)** – average amount of time in seconds that agents were available to answer ACD calls.
- **Average Recall (Avg Recall)** – average amount of time in seconds that agents spent handling incoming ACD calls that were recalled from transfer or park state.
- **Average Wrap-Up (Avg Wrap Up)** – average amount of time in seconds that agents were in the Not Ready state.
- **Busy In** – real time number of agents busy on incoming ACD DN (Pri DN) calls or Secondary Directory Number (Sec DN) calls.
- **Busy Out** – real time number of agents that were busy on outgoing ACD DN (Pri DN) calls or Secondary Directory Number (Sec DN) calls.
- **Occupancy** – a percentage ratio of time that an agent spent answering calls versus total time spent answering, wrapping up, and being available.
- **Ready** – real time number of agents ready and available to answer incoming calls on the ACD DN (Pri DN) or Secondary Directory Number (Sec DN).
- **Recall** – real time number of agents that were busy on incoming ACD DN calls that recalled from a transfer or park state.
- **Total** – total number of positions that includes activities listed in the data box and unattended positions.
- **Transfer** – real time number of agents busy on incoming ACD DN calls that were transferred by another agent.
- **Unattend** – real time number of agent positions not logged on. Agent positions appearing in this state were either logged off manually or automatically due to a forced off condition.
- **Variable Wrap-Up (Var Wrap Up)** – real time number of agents in variable wrap-up state. Wrap-up time is automatically imposed for a fixed interval by the ACD, to allow agents time to complete data entry prior to accepting another ACD call.
- **Wrap-Up** – real time number of agents in a Not Ready state.
Modify Agent Activity Data Box

You can choose which of the available data items will appear in the Agent Activity Data Box and determine the order appearance. The configuration must be saved as a screen layout otherwise the data box configuration will revert to the default setting on the next logon.

ADD DATA BOX ITEMS
1. Click on **Agent Activity** window title bar
2. Click on **ACD Group Name** in **Agent Activity Data Window** for group that you wish to modify (i.e., Midwest)
3. Click anywhere within **Agent Activity Data Box** window
4. Click **Add** button on **Main Toolbar**; a new row field appears at bottom of data box listing
5. Select item from drop-down list of choices to enter your addition

CHANGE DATA BOX ITEMS
1. Click on **Agent Activity** window title bar
2. Click on **ACD Group Name** in **Agent Activity Data Window** for group that you wish to modify
3. Click on item you wish to modify in **Agent Activity Data Box** window (i.e., Avg Busy IN); a drop-down arrow is displayed
4. Click on drop-down arrow to display list of choices, then click on data name to select item
5. To move an item up or down, click on item, then click on **Promote Row** or **Demote Row** button on **Main Toolbar**

REMOVE DATA BOX ITEMS
1. Click on **Agent Activity** window title bar
2. Click on **ACD Group Name** in **Agent Activity Data Window** for group that you wish to remove data box items from
3. Click on item you wish to remove in **Agent Activity Data Box** window (i.e., Avg Busy IN); a drop-down arrow is displayed
4. Click on **Remove** button on **Main Toolbar**; item is removed
Agent Detail Windows

The Agent Detail Windows allow you to view detailed agent information for all ACD groups (SYSTEM), for a specific ACD group, or for a specific agent position within a selected group. Window options are selected using the Real-Time (RT) Display Toolbar. Window title bars indicate which detail window has been selected. Color bars are used to identify the agent condition and the quantity of occurrences.

VIEWING AGENT DETAIL

Agent Detail can be viewed using any of the seven options: Position, PIN, Initials, Primary DN Duration, Secondary DN Duration, Walkaway Code, or Agent Detail Table. Up to ten individual Agent Detail windows can be opened and displayed for one or more ACD groups. Agent data is cleared each time an agent logs out or if the agent position is moved to another ACD group using Load Management.

1. Click on title bar of Agent Activity window
2. Click on ACD Group Name in Agent Activity Data Window for group you wish to view details
3. Click on Agent Details button on RT Toolbar to open a detail window
4. Click on any view option icon on RT Toolbar to change detailed information by the selected category

AGENT DETAIL RT TOOLBAR BUTTONS AND VIEWING OPTIONS

- View Agent Detail [for SYSTEM or a selected ACD group]
- Position Number [last four-digits of ACD DN – 221 number]
- Personal Identification Number [PIN]
- Agent Initials
- Primary Directory Number (PDN) Duration
- Secondary Directory Number (SDN) Duration
- Closed Key Walkaway (CKW) Code Entry
- Agent Detail Table
- View Expanded Agent Detail [for a selected agent position within an ACD group]
AGENT DETAIL TABLE

The detail table displays agent details in a table format to summarize all view options onto one window screen. Each row within the table represents an agent and each column represents agent detail activity. The background color for the Primary DN and Secondary DN indicates the agent state according to the Agent Activity Data Window color chart. OOA Dur (Out of Adherence Duration) is not a service of UCLA IT Services.

- **Pos (Agent Position)** – agent position number (the last four-digits of the ACD DN) for the ACD group selected.
- **PIN (Personal Identification Number)** – Personal Identification Number in-use at the corresponding agent position for the ACD group selected. PIN assignment is managed in the ACD MIS System Descriptions, Agent Records menu. Leading zeros of a PIN do not display (i.e., 0020 displays as 20).
- **Initials** – initials of the agent for the ACD group selected. Agent initials are associated with PIN records, which are assigned in the ACD MIS System Descriptions, Agent Records menu.
- **Pri DN State (Primary DN State)** – current state of the ACD DN such as Unattended (in Make Busy), Busy In (on incoming ACD call) Available (ready to answer), or Wrap up (in Not Ready), etc.
- **Pri DN (Primary DN Duration)** – current duration of time spent in the condition that is represented by the color graphic, for a call received on the ACD DN. The time appears first in minutes + seconds, then in hours + minutes, and then in days + hours. Refer to the Agent Activity Data Window color chart for color identification.
- **Sec DN (Secondary DN Duration)** – current duration of time spent in the condition that is represented by the color graphic, for a call received on the Secondary DN. When the agent position is logged out (Make Busy state) Secondary DN information will not display. The time appears first in minutes + seconds, then in hours + minutes, and then in days + hours. Refer to the Agent Activity Data Window color chart for color identification.
- **Walkaway Code (Closed Key Walkaway Code)** – displays the Closed Key Walkaway (CKW) code an agent used to activate the Not Ready feature. Agents who activate the Not Ready feature without entering a CKW code reflect the default code (0) zero. Zero will appear if your ACD group is not using CKW codes.

EXPANDED AGENT DETAIL

The Expanded Agent Details option provides detailed information for a specific agent position that is appearing in the Agent Detail window of a selected group. Agent record information such as position number, PIN, and name, appear near the status of the Primary and Secondary DN in the upper portion of the expanded window. Agent statistics are shown in the lower portion of the window in three columns: Session Count, Interval Count, and Average Duration.

- **Session Count** – represents the total number of times during the agent’s logon session that the noted condition occurred.
- **Intvl Count** – indicates the total number of times during the 30-minute interval that the noted condition has occurred.
- **Avg Dur** – represents the average duration (in seconds) that the noted condition has lasted during the interval count.

VIEW EXPANDED AGENT DETAIL

1. Click on **ACD Group Name** in Agent Activity Data Window you wish to view
2. Click on **Agent Details** button on RT Toolbar to open a detail window for a selected group
3. Click on agent information you wish to view expanded detail
4. Click on **Expanded Agent Detail** button on RT Toolbar; expanded window opens
Permission Levels

Permission levels are assigned to each user by way of the User Name (used at system logon). A master user name is assigned by IT Services that provides access to all permission levels permitted. Additional user names can be requested from IT Services if different access levels need to be granted to other supporting staff. To request an additional user name, speak with your designated application specialist.

When multiple user names are in affect, call center supervisors/managers can modify or remove system user names and assign user permission levels that enable or disable access to features, displays, and devices. Users can be assigned View Only privileges to permit display information without the ability to make data changes, or Modify privileges to permit display and modify capabilities. There are three general categories of system privileges: Display, Feature, and Device.

DISPLAY PERMISSIONS
- **Display** – Enables the user to view the Real-Time Display windows that show the activities of one or more ACD groups.
- **Other** – Determines whether an ACD group will display on certain lists such as ACD Group Alarms and Load Management.
- **Reports** – Allows the user to request any of the standard system reports for one or more ACD groups.

FEATURE PERMISSIONS
Controls access to features such as report generation, changing queue sizes, and modifying agent records.

DEVICE PERMISSIONS
Assigns remote terminal access privileges. Managed by IT Services system administrators. All devices interacting with the remote terminal must be defined in the IT Services ACD MIS Host.

User Name Management

**Do not modify your master user name.** Only modify or remove a user name that is in addition to your department’s main user name. To request an additional user name, speak with your designated application specialist or consultant.

**VIEW AND MODIFY USER NAMES**
Provides the ability to view and/or modify the Full Name information of an existing User Name, and change the Display and Feature Permissions.

1. Click on Main Menu
2. Select Permissions, then click on User Administration; View/Modify User Administration screen appears
3. Click on Full Name field to modify name information for corresponding User Name
4. To view/modify permission levels, double click on the User Name you wish to view, then select permission category tab [Feature or Display] that you wish to access
5. Click on corresponding menu boxes to toggle permission on or off; check boxes with an  allow user access
6. Click OK to save
   - or -
   Click Cancel to abort
7. Click Yes to save changes
Permissions

REMOVE USER
Do not remove your master user name. The user must be logged out of the system before the User Name can be removed.
1. Click on Main Menu
2. Select Permissions, then click on User Administration; View/Modify User Administration screen appears
3. Click on User Name to be removed
4. Click on Remove button on Main Toolbar; Confirm User Remove dialogue box appears
5. Click OK to remove selected user
   -or-
   Click Cancel to abort
6. Click on Save button on Main Toolbar to save changes

CHANGE USER PASSWORD
Allows you to change the password currently assigned to a user name. Note the new password in a safe place for later reference. If steps are not completed within 30 seconds, the change password dialogue box automatically closes.
1. Click on Main Menu
2. Select Permissions, then click on Change Password; Change Password window appears
3. Enter old password in Enter Old Password field
4. Enter new password in Enter New Password field
5. Re-enter new password in Reenter New Password field
6. Click OK to save your new password
Agent Records

Agent Records allow you to monitor agent performance by the agent name and login location when using Personal Identification Numbers. If agent records are not entered, the ACD MIS will monitor agent activity but it cannot identify the agent by name on the Real-Time Display or on reports. Each agent record contains three areas of information: PIN, Initials, and Full Name.

- **Personal Identification Number (PIN)** – a four-digit number assigned to each ACD agent within the ACD group. This number must match the PIN used by the agent for group logon within the IT Services PIN Code Range.
- **Initials** – agent initials (or another form of identification) that appear in the Agent Detail window on the Real-Time Display. Initials may be up to five characters long.
- **Full Name** – first and last name of agent that appears on agent reports and in the Expanded Agent Detail window of the Real-Time Display. Up to 30 characters may be entered in this field.

**IMPORTANT NOTE:**
Agent PIN assignment must be within the designated PIN code range assigned by IT Services. Refer to your ACD Application Design sheet for your PIN code range.

**ADD AGENT RECORDS**
1. Click on Main Menu
2. Select System Descriptions, then click on Agent Records; View/Modify Agent Records window appears
3. Click on Add button on Main Toolbar; cursor is positioned at bottom of data entries
4. Enter agent PIN
5. Press Tab key to move to Initials field
6. Enter agent initials
7. Press Tab key to move to Full Name field
8. Enter agent name
9. Press Tab key to add a new row, then repeat steps 4 through 8
   - or -
   - Click on Save button on Main Toolbar to save changes
10. Close window

**EDIT AGENT RECORDS**
1. Click on Main Menu
2. Select System Descriptions, then click on Agent Records; View/Modify Agent Records window appears
3. Click on data field (PIN, Initials, or Full Name) for agent record you wish to modify
4. Press Delete key, then enter new information
5. Click on Save button on Main Toolbar to save changes
6. Close window

**REMOVE AGENT RECORDS**
1. Click on Main Menu
2. Select System Descriptions, then click on Agent Records; View/Modify Agent Records window appears
3. Click on any data field for agent record you wish to remove
4. Click on Remove button on Main Toolbar; Confirm Agent Remove dialogue box appears
5. Click OK to remove selected agent record
   - or -
   - Click Cancel to abort
6. Click on Save button on Main Toolbar to save changes
7. Close window
Line Of Business (LOB) Codes

LineOfBusinessCodespermitsthetelephoneagenttoentera three-digit code to categorize the type of ACD call being handled. LOB Code descriptions determine the call categories associated with each code. LOB codes and descriptions are defined by the ACD call center supervisor/manager, using any series of three-digit codes numbered 000-999. A maximum of 1,000 codes are possible.

LOB code information appears on LOB reports. The “1000” code may appear on some LOB reports, which represents all non-predefined codes entered. In other words, the agent entered a code that was not recognized by the ACD MIS.

- **Code** – a three-digit code entered by a telephone agent during an ACD call to identify the type of call being handled.
- **Description** – descriptive name associated with the LOB code. This name appears on LOB reports and may contain up to 30 characters. The LOB code description may be changed for any code.

**ADD LOB CODE AND DESCRIPTION**

1. Click on Main Menu
2. Select System Descriptions, then click on LOB Code Descriptions; View/Modify LOB Code Description window appears
3. Click on Add button on Main Toolbar; cursor is positioned at bottom of data entries
4. Enter LOB code
5. Press Tab key to move to Description field
6. Enter description for LOB code
7. Press Tab key to add a new row, then repeat steps 4 through 6
   - or -
   - Click on Save button on Main Toolbar to save changes
8. Close window

**EDIT LOB CODE OR DESCRIPTION**

1. Click on Main Menu
2. Select System Descriptions, then click on LOB Code Descriptions; View/Modify LOB Code Description window appears
3. Click on data field [Code or Description] for LOB record you wish to modify
4. Press Delete key, then enter new information
5. Click on Save button on Main Toolbar to save changes
6. Close window

**REMOVE LOB CODE**

1. Click on Main Menu
2. Select System Descriptions, then click on LOB Code Descriptions; View/Modify LOB Code Description window appears
3. Click on data field for LOB record you wish to remove
4. Click on Remove button on Main Toolbar; Confirm LOB Code Remove dialogue box appears
5. Click OK to remove selected LOB code
   - or -
   - Click Cancel to abort
6. Click on Save button on Main Toolbar to save changes
7. Close window

**Confirm LOB Code Remove**

Are you sure you want to remove the following:

- Code: 399
  Description: Happy Caller

[OK] [Cancel]
Closed Key Walkaway (CKW) Codes

Closed Key Walkaway codes represent the reason why an agent activated the Not Ready feature key. A supervisor is able to determine why a specific agent entered the Not Ready condition when CKW codes are recorded. Examples of Not Ready conditions include break, paperwork, or meeting with a supervisor. CKW codes and descriptions are defined by the ACD call center supervisor/manager, using any series of three-digit codes numbered 000-999. A maximum of 1,000 codes are possible.

CKW code information appears on the Real-Time Display Agent Detail window and on CKW reports. A zero (0) appearing in Agent Detail indicates that an agent did not use a CKW code. The “1000” code may appear on CKW reports, which represents all non-predefined codes entered. In other words, the agent entered a code that was not recognized by the ACD MIS.

- Code – a three-digit code entered by a telephone agent immediately after activating Not Ready.
- Description – descriptive name associated with the CKW code. This name appears on the Real-Time Display under agent detail and on CKW reports. It may contain up to 30 characters. The CKW code description may be changed for any code.

ADD CKW CODE AND DESCRIPTION

1. Click on Main Menu
2. Select System Descriptions, then click on CKW Code Descriptions; View/Modify CKW Code Description window appears
3. Click on Add button on Main Toolbar; cursor is positioned at bottom of data entries
4. Enter CKW code
5. Press Tab key to move to Description field
6. Enter description for CKW code
7. Press Tab key to add a new row, then repeat steps 4 through 6
- or -
   Click on Save button on Main Toolbar to save changes
8. Close window

EDIT CKW CODE OR DESCRIPTION

1. Click on Main Menu
2. Select System Descriptions, then click on CKW Code Descriptions; View/Modify CKW Code Description window appears
3. Click on data field [Code or Description] for CKW record you wish to modify
4. Press Delete key, then enter new information
5. Click on Save button on Main Toolbar to save changes
6. Close window

REMOVE CKW CODE

1. Click on Main Menu
2. Select System Descriptions, then click on CKW Code Descriptions; View/Modify CKW Code Description dialogue box appears
3. Click on any data field for the CKW code you wish to remove
4. Click Remove button on Main Toolbar; Confirm CKW Code Remove dialogue box appears
5. Click OK to remove selected CKW code
- or -
   Click Cancel to abort
6. Click Save button on Main Toolbar to save changes
7. Close window when all records have been modified
Load Management

Queue Parameters

Queue Parameters can be changed within your ACD group by sending a change request from the remote terminal to the IT Services ACD MIS Host. The IT Services ACD MIS Host signals the requesting remote terminal when a change has been implemented within the ACD group. Because queue parameters can impact the performance of your ACD group(s), in-depth knowledge of queue and setting interactions is highly recommended.

Queue parameters are defined for each ACD group therefore, parameter settings may vary from group to group and some of the queue parameters defined below may not apply to your specific application. Refer to your ACD Application Design sheet to verify which services are active for your application.

PRIORITY PROMOTION
Increases the priority level of a low priority call that is waiting in the call queue. The promotion is based on the amount of time spent in the low priority status. This feature eliminates the possibility of a low priority call remaining unanswered for a long period of time when your ACD group is receiving many high priority calls. The time threshold can be modified using the ACD MIS remote terminal.

MAXIMUM WAIT TIME
Determines the maximum amount of time a call can wait in the physical call queue before the queue is closed. A timer is started for each call that enters the call queue. When the Maximum Wait Time threshold has been reached, the queue closes and new calls are deflected to the Overflow destination. The time threshold can be modified using the ACD MIS remote terminal.

MAXIMUM PHYSICAL QUEUE SIZE
The physical queue is the primary ACD call queue. The Maximum Physical Queue Size sets the maximum number of calls that can wait in the physical call queue for the next available agent, which is defined by the quantity of queue slots. Once the queue size limit is reached, the queue closes and new calls are deflected to the Overflow destination. The queue slot size can be modified using the ACD MIS remote terminal.

MAXIMUM LOGICAL QUEUE SIZE
The logical queue applies only to ACD applications that have multiple ACD groups and are using the Time Delay Overflow (TDO) feature. The Maximum Logical Queue Size defines the maximum number of calls that can over-flow-out of an ACD group after the TDO threshold timer has expired. When a call waiting in the physical queue exceeds the TDO timer, the call is simultaneously queued in the physical queue of the source group and in the logical queue of the destination group. This helps expedite calls waiting by queuing a call in two ACD groups at one time. The call will be routed to the first available agent of either ACD group. The queue slot size can be modified using the ACD MIS remote terminal.

CALL TRANSFER QUEUE SIZE
Holds calls that were transferred directly to an agent position that was busy during an agent-to-agent call transfer. The transferred call waits in the call transfer queue until the agent becomes available. This condition can also occur if the agent position was in a Not Ready condition. The queue slot size can be modified using the ACD MIS remote terminal.
Priority Promotion

When all agents are busy assisting ACD calls, new incoming calls are held in the call queue and are distributed to available agents based on priority levels and the order of call arrival. Priority levels are assigned to the pilot and supplementary numbers of the ACD group. Priority levels range from 0 for the highest priority to 3 for the lowest. High priority ACD calls are always presented to available agents before low priority calls. Refer to your ACD Application Design sheet to determine if priority levels and if priority promotion is assigned to your ACD group.

Priority Promotion increases the priority level of a call based on the amount of time spent waiting in a lower priority status. You can change the number of seconds during which calls are delayed in queue before promotion to a higher priority is initiated. Time values range from 0 to 255 seconds. A value of zero (0) will disable priority promotion for the selected group.

**VIEW OR MODIFY PRIORITY PROMOTION**

1. Click on Main Menu
2. Select Load Management, then Queues, and then click on Priority Promotion; View/Modify Priority Promotion window appears
3. Locate ACD Group Name you wish to view priority promotion; value under Current column indicates set time value
4. Click on Requested column for ACD group you wish to change
5. Enter new time value (in seconds), then press Enter key; confirmation dialogue box appears
6. Click Yes to send request to IT Services ACD MIS Host; if accepted, new values appear in Current column
7. If an error code is displayed in Status column, contact IT Services Client Support at 310-825-8000 for assistance

Maximum Wait Time

The Maximum Wait Time determines the maximum amount of time a call can wait in the physical call queue before the queue is closed. A timer is started for each call that enters the call queue. When the Maximum Wait Time is reached, the queue is closed to new incoming calls. Existing calls in queue continue waiting while new calls are deflected to the Overflow destination. Refer to your ACD Application Design sheet to identify your ACD group’s Overflow destination.

The Maximum Wait Time value cannot exceed 1800 seconds (30 minutes). A value of zero (0) will close the queue and send all new calls to the Overflow destination. The Maximum Wait Time should be greater than the Time Delayed Overflow (TDO) timer or the Time Delayed Threshold Route (TDTR) timer if these features are assigned, to ensure proper functionality.

**VIEW OR MODIFY MAXIMUM WAIT TIME**

1. Click on Main Menu
2. Select Load Management, then Queues, and then click on Maximum Wait Time; View/Modify Maximum Wait Time window appears
3. Locate ACD Group Name you wish to view wait time; value under Current column indicates set time value
4. Click on Requested column for ACD group you wish to change
5. Enter new time value (in seconds), then press Enter key; confirmation dialogue box appears
6. Click Yes to send request to IT Services ACD MIS Host; if accepted, new values appear in Current column
7. If an error code is displayed in Status column, contact IT Services Client Support at 310-825-8000 for assistance

![View/Modify Maximum Wait Time](image)
Maximum Physical Queue Size

The Maximum Physical Queue Size sets the maximum number of calls that can wait in the call queue. The size is defined by the quantity of queue slots allocated. When the queue size limit is reached (all queue slots are full), the queue is closed to new incoming calls. Existing calls in queue continue waiting while new calls are deflected to the Overflow destination. The Maximum Physical Queue Size cannot exceed the Maximum Value of Queue Size. Refer to your ACD Application Design sheet to identify your ACD group’s Overflow destination and Maximum Value of Queue Size.

A value of zero (0) will close the queue and send all new calls to the Overflow destination. The Maximum Physical Queue Size must be greater than the Maximum Logical Queue Size and the Call Transfer Queue Size if these features are assigned, to ensure proper functionality.

Maximum Logical Queue Size

The Maximum Logical Queue Size sets the maximum number of calls that can wait in the call queue of another ACD group when the Time Delay Overflow (TDO) condition has been activated. The size is defined by the quantity of queue slots allocated. Logical queuing applies when multiple ACD groups are assigned to a single ACD application. Calls from one ACD group can overflow to another ACD group when callers have been waiting too long, in an effort to expedite calls. Refer to your ACD Application Design sheet to determine if logical queuing is assigned to your ACD group.

A TDO timer is started for each call that enters the physical call queue of the primary (or source) ACD group. The source group is the ACD group that originally received the call. When a caller exceeds the TDO threshold time, the call overflows to a designated ACD group (destination group). The call now resides in the source group’s physical call queue and in the destination group’s logical queue. The call remains in both queues until an agent from either group becomes available to answer the call.

The Maximum Logical Queue Size must be equal to or less than the Maximum Physical Queue Size. A value of zero (0) will turn off (disable) the Time Delay Overflow feature.

View or Modify Maximum Physical Queue Size

1. Click on Main Menu
2. Select Load Management, then Queues, and then click on Maximum Physical Queue Size; View/Modify Maximum Physical Queue Size window appears
3. Locate ACD Group Name you wish to view queue size; value under Current column indicates set time value
4. Click on Requested column for ACD group you wish to change
5. Enter new queue slot value, then press the Enter key; confirmation dialogue box appears
6. Click Yes to send request to IT Services ACD MIS Host; if accepted, new values appear in Current column
7. If an error code is displayed in Status column, contact IT Services Client Support at 310-825-8000 for assistance

View or Modify Maximum Logical Queue Size

1. Click on Main Menu
2. Select Load Management, then Queues, and then click on Maximum Logical Queue Size; View/Modify Maximum Logical Queue Size window appears
3. Locate ACD Group Name you wish to view queue size; value under Current column indicates set time value
4. Click on Requested column for ACD group you wish to change
5. Enter new queue slot value, then press the Enter key; confirmation dialogue box appears
6. Click Yes to send request to CTS ACD MIS Host; if accepted, new values appear in Current column
7. If an error code is displayed in Status column, contact IT Services Client Support at 310-825-8000 for assistance
Call Transfer Queue Size

The Call Transfer Queue Size determines the maximum number of calls that can be held in the transfer queue when agent-to-agent call transferring is performed. When an agent transfers an ACD call to another agent position, and that agent is busy assisting an ACD caller, the transferred call waits in the call transfer queue until that agent becomes available. This condition can also occur if the agent position was in a Not Ready condition at the time the call was transferred. Refer to your ACD Application Design sheet to determine if the call transfer queue is being used by your ACD group.

A value of zero (0) prohibits calls from being transferred between agents. The Call Transfer Queue Size must be less than the Maximum Physical Queue Size.

VIEW OR MODIFY CALL TRANSFER QUEUE SIZE

1. Click on Main Menu
2. Select Load Management, then Queues, and then click on Call Transfer Queue; View/Modify Call Transfer Queue window appears
3. Locate ACD Group Name you wish to view queue size; value under Current column indicates set time value
4. Click on Requested column for ACD group you wish to change
5. Enter new queue slot value, then press the Enter key; confirmation dialogue box appears
6. Click Yes to send request to IT Services ACD MIS Host; if accepted, new values appear in Current column
7. If an error code is displayed in Status column, contact IT Services Client Support at 310-825-8000 for assistance

Moving Agent Positions

You may reassign agents to a different ACD group within your application by moving agent positions from one ACD group to another. The new assignment does not affect calls already in progress or in queue. Calls routed to the agent position after the change reflect the new assignment.

MOVE AGENT POSITIONS

1. Click on Main Menu
2. Select Load Management, then Miscellaneous, and then click on Agent Positions; View/Modify Agent Positions window appears
3. Double-click on Agent Position number you wish to move; Agent Positions window opens
4. Click on drop-down arrow for ACD Group field, and then select group you wish the agent position to reside in
5. Click Send button to select
6. Click Yes to send request to IT Services ACD MIS Host; if accepted, new values appear in Current column
7. If an error code is displayed in Status column, contact IT Services Client Support at 310-825-8000 for assistance
Report Templates

The ACD MIS remote terminal offers in-depth historical reporting of your call center. It provides standard reporting functions to allow you to quickly generate reports based on data selected using standard report templates.

Reports are locally produced on the remote terminal using data that is downloaded from the IT Services ACD MIS Host into non-editable Crystal Report templates. Reports are generated based on selections you make for data requirements. The View/Modify Reports permission is required to access the Report application menu, which provides menu selections to create, modify, or delete private and public custom reports.

Crystal Reports is the reporting tool for data conversions, report design, display and printout. Crystal Reports software is included with the ACD MIS For Windows package. Reports can be printed daily, weekly, or monthly. A yearly option is available, however, only up to six months of data can be retrieved from the IT Services ACD MIS Host.

When specifying a report scope avoid downloading huge quantities of data. Lengthy downloads affect disk space required on both the IT Services ACD MIS Host and the ACD MIS For Windows remote terminal, and impact transmission times between the host and your remote terminal.

Report examples can be found in the Perimeter Technology Standard Reports Guide provided on CD Rom at the time of installation.

REPORT FORMATS

Each ACD MIS report template offers different reporting formats for report generation, which are defined below.

- **Cumulative Report** – summarizes the data for all selected ACD groups. If the parameters set in the Time Values For Archive Data vary amongst the selected ACD groups contained within this report, a warning message will display in place of the data. Other data in the report will not be affected.
- **Report By ACD Group** – gathers data for a specific ACD group and is titled with the name of the ACD group for which the report is being printed. A separate report is printed for each ACD group selected on the Report Scope window.
- **Report By DN** – gathers data for a specific ACD pilot or supplementary number and is titled with the number for which the report is being printed.
- **By Subgroup** – not applicable to the design of ACD applications at UCLA CTS.
- **Graphic Report** – some report formats produce graphic reports automatically. Graphic reports cannot be printed independently and are associated with the selected report type.
General Notes Affecting Reports

- **Total Calls Offered Fields** – refers to calls offered to the call destination ACD group. The distinction becomes relevant in an overflow situation. The call is credited to the destination overflow ACD group (when Time Delay Overflow is invoked) and not to the group originally assigned to receive the call. Reports generated by ACD DN track the call by incoming DN.

- **Agent Reports Require Entry of Agent Names** – if an agent name is not entered in the details field of the Agent Records, agent reports display the agent PIN without the associated agent name.

- **Printing Cumulative Reports** – a cumulative report generates data for selected groups for which you have been given report permission. If a cumulative report for multiple ACD groups will be generated, enter the same data calculations and time intervals for each ACD group on the Time Values for Archive Data screen one day prior to generating cumulative reports. If parameters on the Time Values for Archive Data screen do not match, ACD group data cannot be combined in a cumulative report.

- **Report Scope** – scope is tied to user permissions. The content of each report will be limited to the Display/Print permissions associated with your User Name used for login. Each report will only contain the data in which you are allowed to view and export. Data for “all” groups, agents, etc., consists of the data for all the entities for which you have permission. The report module scope dialog box gives you the opportunity to further specify which data is to be downloaded from the CTS ACD MIS Host for report generation.

- **Time Values for Archive Data** – located under the System Configuration menu, it enables you to specify custom parameters for the following reporting options: Grade of Service (GOS) Calculation, Real-Time Data Calculation Interval, Abandoned Ignored Time, Short Call Time, Report Time Intervals, Transferred Calls, Archive LOB Code Data, and Archive CKW Code Data. For more information, refer to the Systems Configuration section of this user guide.
Incoming Calls Waiting Reports

This report type offers three formats: Cumulative, By ACD Group, or By DN. Reports show the call centers efficiency by calculating the total number of calls received and answered. Additional data includes individual, average, and longest delays before answering calls. All data is presented in daily half-hour increments or less, depending on time intervals set in the Archive Schedule. If the report date scope spans more than one day, a separate report is generated for each day.

GRAPHIC REPORTS

All Incoming Calls Waiting Reports generate graphic reports that indicate how many calls were answered above or below the Grade of Service (GOS) setting, as well as the number of calls abandoned before being answered by an agent. To determine how many calls were abandoned or answered above or below the Grade of Service cutoff time value, calculate the difference between the lowest point and the highest point of the corresponding graphic fill.

REPORT FIELDS AND DEFINITIONS

- **Abandoned** – calls terminated before reaching agents
- **Answered Above GOS** – calls answered above the defined Grade of Service (GOS) cutoff time value for the reporting period
- **Answered Under GOS** – calls answered at or below the defined Grade of Service (GOS) cutoff time value for the reporting period
- **Average Delay Per Call** – average time required for an ACD group to answer overflowed and non-overflowed ACD calls. The average time appears numerically, followed by a graphic representation using the time values referenced in the previous field and established through System Configuration.
- **Calls Answered** – total number of calls answered by agents.
- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Calls Offered** – total number of calls received by an ACD group, including abandoned calls.
- **Cumulative Percentage** – percentage of calls answered within a number of seconds for each variable, compared to the total calls answered.
- **Longest Delay** – maximum delay in seconds a caller waited for an agent.
- **Non-Overflow Delay** – delay time (in seconds) for calls received directly to the ACD group. This field does not include calls that overflowed from another group.
- **Number of Calls** – appears vertically on the graphic report, scaled to the maximum number of calls for the reporting period.
- **Number of Calls Answered Within [number] Seconds** – the time (in seconds) required to answer calls. Calls in the 20-second column were answered within 20 seconds, and calls answered in the 40-second column were answered within that period of time (which is a 21 to 40 second time period). Cumulative percentages indicate the percentage of total calls answered within a period of seconds. Time values can be customized through the System Configuration menu.
- **Time of Day** – appears horizontally on the graphic report, scaled to time intervals defined in System Configuration (e.g. 07:00, 07:30, 08:00, etc.).
Incoming Calls Abandoned Reports

This report type offers three formats: Cumulative, By ACD Group, or By DN. Reports show the number of callers who terminated their calls before speaking to agents for a selected ACD group. Each report includes the number of calls that abandoned before and after the caller heard the queue recorded announcement (RAN). If the report date scope spans more than one day, a separate report is generated for each day.

GRAPHIC REPORTS
All Incoming Calls Abandoned Reports also generate graphic reports. To determine how many calls were abandoned before or after callers heard recorded voice announcements, calculate the difference between the lowest point and the highest point of the corresponding graphic fill.

REPORT FIELDS AND DEFINITIONS
- **Abandoned After RAN** – total number of calls terminated after callers heard the queue recorded announcement (RAN).
- **Abandoned Before RAN** – total number of calls terminated before callers heard the queue recorded announcement (RAN).
- **Average Wait Before Abandonment** – average amount of time callers waiting before abandoning. The average time appears numerically, followed by a graphic representation using the time values referenced in the previous field.
- **Calls Abandoned After RAN** – total number of calls terminated after callers heard the queue recorded announcement (RAN).
- **Calls Abandoned Before RAN** – total number of calls terminated before callers heard the queue recorded announcement (RAN).
- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Cumulative Percentage** – percentage of calls abandoned within a number of seconds, for each variable, compared to total calls abandoned.
- **Longest Wait** – maximum amount of time in seconds a caller waited before abandoning the call.
- **Network Abandons** – number of overflowed calls received by an ACD group that were abandoned from the logical queue.
- **Number Abandoned Within [number] Seconds** – number of calls abandoned within user-defined amounts of time (in seconds). Calls in the 10-second column were abandoned within 10 seconds, and calls abandoned in the 20-second column were abandoned within that period of time (which is a 11 to 20 second time period). Cumulative percentages at the bottom of this column indicate the percentage of total calls abandoned after a period of seconds. Time values can be customized through the System Configuration menu.
- **Number of Calls** – appears vertically on the graphic report, scaled to the number of abandoned calls for the reporting period.
- **Time of Day** – appears horizontally on the graphic report, scaled to 30 minute increments. This report covers hours during which there was call activity.
- **Transfer Abandons** – number of calls waiting in any transfer queue that were abandoned.
Incoming Call Duration Reports

This report type offers three formats: Cumulative, By ACD Group, or By DN. Reports show the duration and number of calls answered for a selected ACD group. Each report includes the total calls answered and the amount of time required to complete the calls. Additional data includes the average and longest call for each time period. If the report date scope spans more than one day, a separate report is generated for each day.

REPORT FIELDS AND DEFINITIONS

- **Average Call Duration** – average amount of time required for an agent to complete an ACD call. The average time appears numerically, followed by a graphic representation using the time values referenced in the previous field and are configured through System Configuration.
- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Calls Completed** – total number of incoming ACD calls completed by agents for the reporting period.
- **Cumulative Percentage** – percentage of completed calls (within a number of seconds) for each variable, compared to total calls completed.
- **Longest Call** – maximum amount of time (in seconds) an agent spent handling a call.
- **Number of Calls Completed Within [number] Seconds** – number of calls completed within the user-defined amounts of time (in seconds). Calls in the 30-second column were completed within 30 seconds, and calls in the 60-second column were completed within that period of time (which is a 31 to 60 second time period). The cumulative percentages at the bottom of this column indicate the percentage of total calls that were completed after a period of seconds. Time values can be customized through the System Configuration menu.

Incoming Call Termination Reports

This report type offers two formats: Cumulative and By ACD Group. Reports provide an overview of calls that pass into or through a selected ACD group. A single call can be counted in multiple columns, once for each group through which it has passed. Therefore, the totals in this report may not reconcile with other cumulative reports that count each call only once.

Information is provided for call states prior to being offered, as well as when offered.

- **Prior to being offered** – the call could not or did not enter the queue for this Group. A Busy call was not offered anywhere.
- **Calls originating at this ACD Group** – identifies what happened to calls after being offered to the group.

REPORT FIELDS AND DEFINITIONS

- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Path of Calls Routed Through This ACD Group: Prior To Being Offered**
  - **Busy** – number of calls given a group busy treatment because they could not be offered to this ACD group or deflected to another group.
  - **Deflect QFull** – number of calls deflected from this ACD group to the Overflow destination because the physical call queue was full and closed.
  - **Deflect Qwait** – number of calls deflected from this ACD group to the Overflow destination because the maximum wait time for the physical call queue had been reached and the queue closed.
- **CIF Route** – number of calls routed through this ACD group due to the Controlled Interflow feature key. These calls are routed to a pre-determined telephone number. When activated, calls that were already waiting in the call queue continue to wait while new incoming group calls are redirected. Refer to your ACD Application Design sheet to identify your CIF Route.
- **Night Serv** – number of calls routed through this ACD group as a result of a Night Service condition.
Path of Calls Routed Through This ACD Group: **Offered**

- **Before TDO Ans** – number of calls answered by this ACD group prior to the expiration of the Time Delay Overflow (TDO) timer.
- **Before TDO Aban** – number of calls abandoned from this ACD group prior to the expiration of the Time Delay Overflow (TDO) timer.
- **TDO Ans Phy Q** – number of calls answered from the Physical Call Queue after the expiration of the Time Delay Overflow (TDO) timer.
- **TDO Aban** – number of calls abandoned after the expiration of the Time Delay Overflow (TDO) timer.

Path of Calls Routed Through This ACD Group: **Not Offered**

- **Ans Lgcl Q** – number of calls answered from the Logical Queue due to TDO condition.
- **Lgcl Q TDTR** – number of calls sent to the Time Delay Threshold Route (TDTR).

Path of Calls Routed Through This ACD Group: **Totals**

- **Total Ans** – total number of calls offered to this ACD group and answered by this group or the group to which the call overflowed.
- **Total Aban** – total number of calls offered to this ACD group that were abandoned.
- **Total Other** – total number of calls given a busy treatment, which includes: Deflected (overflowed because queue closed), Night Service, Controlled Interflow Feature (CIF) and Time Delay Threshold Route (TDTR) routing.

Path of Calls Originating At This ACD Group Answered By This Group – total number of calls originally offered to and answered by this ACD group.

Path of Calls Originating At This ACD Group Answered By Another Group – total number of calls originally offered to this ACD group but answered by another group.

Path of Calls Originating At This ACD Group Abandoned Calls – total number of calls originally offered to this group but abandoned prior to being answered.
Incoming Traffic Analysis Reports

This report type offers three formats: Cumulative, By ACD Group, or By DN. Reports condense information for three other reports: Incoming Calls Waiting, Incoming Calls Abandoned, and Incoming Call Duration. Reports account for calls that carry over to the next archived period, and calls are counted as:

- **Calls Offered** – time during the archived period the call was answered or abandoned.
- **Duration** – time during the archived period the call was completed.

For example, if a call resided in the call queue between 8:00 a.m. to 8:30 a.m. and was abandoned at 8:35 a.m., the call is considered an offered call during the 8:30 a.m. to 9:30 a.m. time period.

**REPORT FIELDS AND DEFINITIONS**

- **Avg. Call Duration** – average amount of time (in seconds) agents spent to complete ACD calls.
- **Avg. Speed of Answer** – average amount of time (in seconds) callers waited in queue before speaking to an agent.
- **Avg. Wait To Abandon After RAN** – average amount of time (in seconds) callers waited in the call queue prior to terminating their call, after hearing the recorded announcement (RAN).
- **Avg. Wait To Abandon Before RAN** – average amount of time (in seconds) callers waited in the call queue prior to terminating their call, before hearing the recorded announcement (RAN).
- **Calls Aban After RAN** – total number of calls terminated after callers heard the queue recorded announcement (RAN).
- **Calls Aban Before RAN** – total number of calls terminated before callers heard the queue recorded announcement (RAN).
- **Calls Answ** – total number of calls answered by agents.
- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Calls Offered** – total number of calls received by an ACD group, including abandoned calls.
- **Max. Call Duration** – maximum amount of time (in seconds) an agent spent with a caller.
Incoming Calls Reports

This report type offers two formats: By ACD Group and By DN. Reports list groups and their total ACD calls received for the reporting period. Each report also calculates the percentage of delayed, abandoned and non-delayed status’s of those calls and provides averages of the time callers spent in queue and the length of ACD calls.

REPORT FIELDS AND DEFINITIONS

- **ACD Group** – pilot or supplementary number(s) and the name of the ACD group(s) represented in the report.
- **Calls Offered** – total number of calls received by an ACD group, including abandoned calls. If this value is zero, the values for Percent Of Incoming Calls will display “N/A” for Not Applicable.
- **Percent of Incoming Calls**
  - **Delay** – percentage of ACD calls required to wait in queue prior to being answered by an agent.
  - **No Delay** – percentage of ACD calls routed directly to agents, without waiting in queue.
  - **GOS** – percentage of total calls answered at or under the configured Grade of Service value.
  - **Abandoned** – percentage of ACD calls disconnected before speaking to an agent.
  - **Night Service** – total number of calls that were routed to the night service arrangement because all agents were logged off or the Night Service feature key was activated.
  - **Total Busy** – total number of calls sent to a group that could not be offered to an agent, sent to a queue, or overflowed to another group. Caller receives group busy treatment.

Avg. Speed Of Answer

- **Total** – average amount of time (in seconds) callers waited in queue before speaking to an agent. Includes time the call spent in both the logical and physical queues.
- **Non-Overflow** – average amount of time (in seconds) that callers waited in queue before speaking to an agent. This excludes calls that overflowed from another group.
- **Average Conversation** – average amount of time (in seconds) that agents spent talking to callers on incoming ACD calls.

Demand and Resource Reports

This report type offers two formats (applicable to UCLA): Cumulative and By ACD Group. Reports produce agent resource evaluations, listing the average number of agents logged-on during incremental time periods throughout the reporting period. Each report provides ACD DN call totals and the average number of ACD calls answered. It also includes the percentage of calls answered within the configured Grade of Service (GOS), number of outgoing calls, and the ratio of secondary DN calls to ACD calls.

REPORT FIELDS AND DEFINITIONS

- **Avg. Number Agents** – average number of agents logged on to the CTS ACD telephone system per day.
- **Calls Per Agent** – average number of ACD calls answered per agent.
- **GOS %** – percentage of ACD calls answered by agents within Grade of Service value.
- **Incm. Calls Completed** – total number of ACD calls answered by agents. Calls abandoned before speaking to agents are not included.
- **Outgoing Calls Pri** – not applicable to UCLA system configurations.
- **Outgoing Calls Sec** – number of outgoing calls made by agents on the Secondary Directory Number (SDN) lines.
- **Outg. Per Incm.** – ratio of outgoing calls made by agents, compared to ACD calls received by agents.
- **[Percentage] % Abandoned** – percentage of ACD calls disconnected before speaking to agents.
- **Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Total Busy** – total number of calls sent to a group that could not be offered to an agent, sent to a queue, or overflowed to another group. Caller receives group busy treatment.
## Workload Summary Reports

This report type offers two formats: By ACD Group and By DN. Reports summarizes ACD group productivity during a selected reporting period. Monthly reports provide useful summaries of call center workloads. Includes the total incoming and outgoing calls, the number of calls that went in queue, the number of calls that went directly to agents, and the number of calls abandoned before speaking to agents.

### REPORT FIELDS AND DEFINITIONS

- **ACD Group** – pilot or supplementary number(s) and the name of the ACD group(s) represented in the report.
- **Calls Answered** – total number of calls answered by an agent.

**Not available on reports sorted by ACD DN**

- **Outgoing Calls Pri** – not applicable to UCLA system configurations.
- **Outgoing Calls Sec** – number of outgoing calls made by agents on the Secondary Directory Number (SDN) lines.
- **Out Per Answd.** – ratio of outgoing calls made by agents compared to ACD calls received by agents.

### Number Of Incoming Calls

- **Delay** – total number of ACD calls that waited in queue before being answered.
- **No Delay** – total number of ACD calls routed directly to agents without waiting in queue.
- **GOS** – total number of ACD calls answered by agents at or within the system configured Grade of Service value.
- **Aban** – total number of ACD calls abandoned before speaking to agents, including calls abandoned before and after hearing the queue recorded announcement (RAN).

### % Of Incm Calls

- **Delay** – percentage of ACD calls answered after waiting in the call queue.
- **GOS** – percentage of ACD calls answered by agents at or within the system configured Grade of Service value.
- **Aban** – percentage of ACD calls abandoned before speaking to agents.
- **Ntwk Aban** – total number of calls received in the logical queue of the ACD group that were abandoned.
- **Xfer Aban** – number of calls abandoned after waiting in the transfer queue.

## Workload Detail Reports

This report type offers three formats: Cumulative, By ACD Group, or By DN. Reports furnish group efficiency statistics for a single ACD group. Each report includes the ACD calls offered and answered, including the number and percentage answered within the configured Grade of Service (GOS) value.

### REPORT FIELDS AND DEFINITIONS

- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Calls Abandoned After RAN** – total number of calls terminated after callers heard the queue recorded announcement (RAN).
- **Calls Abandoned Before RAN** – total number of calls terminated before callers heard the queue recorded announcement (RAN).
- **Calls Answered** – total number of calls answered by agents.
- **Calls Offered** – total number of calls received by an ACD group, including abandoned calls.
- **Calls Presented** – total number of ACD calls pegged when first offered to a physical queue or agent.
- **GOS %** – percentage of total calls answered at or under the configured Grade of Service value.
- **[Number] # Answered Under GOS** – total number of calls answered in less than or equal to the configured Grade of Service value.
- **Percent Abandoned** – percentage of total ACD calls abandoned before speaking to agents.

## Overflow Analysis Reports

These reports track all calls based on source and destination ACD group regardless of why a call overflowed (e.g. deflected because queue closed, time delay overflow, etc.). Each report summarizes overflow situations for the specified reporting period. Data is not shown for ACD groups where no overflow activity occurred.
Matrix Report

This report lists information in the form of a spreadsheet with destination ACD group information listed vertically and source ACD group information listed horizontally.

REPORT FIELDS AND DEFINITIONS

- **Source ACD Group** – ACD group to which calls were first directed.
- **Destination ACD Group** – ACD group where calls were answered. Overflow data for destination groups appears in rows.
- **Calls Overflowed Out Of Source** – number of calls overflowed from the source ACD group to the destination ACD group.
- **Calls Overflowed Into Source** – number of calls overflowed from another group into the source ACD group.

Totals

- **Calls Overflowed Out Of Source** – total number of answered calls originated from the Source ACD group.
- **Calls Overflowed Into Source** – total number of calls answered by the source ACD group regardless of where they originated.

Percentages

- **Calls Overflowed Out Of Source** – percentage of answered calls originally directed to the source ACD group but answered elsewhere. Result is always rounded off.
- **Calls Overflowed Into Source** – percentage of calls answered by source ACD group regardless of where they originated.
- **Total Destination Calls Overflowed** – appears on the matrix report indicating the total number of calls answered by a specific destination ACD group regardless of where they originated. Represents the sum of all call counts in the row to the right of the destination ACD group name.
- **Total Source Calls Overflowed** – appears on the matrix report indicating the total number of answered calls originated from a source group overflowed to another ACD group. Represents the sum of all call counts in the column below the Source group number.
Overflow Interval Report

This report tracks all calls based on source and destination ACD group regardless of why a call overflowed (deflected, time delay overflow, etc.). It summarizes overflow situations by time intervals throughout a day.

REPORT FIELDS AND DEFINITIONS

- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Calls Overflowed Into Source** – number of calls overflowed from another group into the source ACD group.
- **Calls Overflowed Out Of Source** – number of calls overflowed from the source ACD group to the destination ACD group.
- **Destination ACD Group** – ACD group where calls were answered. Multiple destination groups may appear for each archive interval.
- **Source ACD Group** – ACD group to which calls were first directed.

**Interval Percentages**

- **Calls Overflowed Out Of Source** – percentage of answered calls overflowed from the source group but answered elsewhere during the report interval. Result is always rounded off.
- **Calls Overflowed Into Source** – percentage of overflow incoming calls answered by the ACD group during the report interval. These calls were originally directed elsewhere. Result is always rounded off.

**Interval Totals**

- **Calls Overflowed Out Of Source** – total number of answered calls originally directed to the source group but answered elsewhere during the archive interval.
- **Calls Overflowed Into Source** – total number of calls answered by the source ACD group regardless of where they originated during the entire report interval. Includes calls overflowed from another group, and calls that did not overflow and were directly answered.

**Percentages**

- **Calls Overflowed Out Of Source** – percentage of all answered calls overflowed from the source group but answered elsewhere during the report interval. Result is always rounded off.
- **Calls Overflowed Into Source** – percentage of all overflow incoming calls answered by the ACD group during the report interval. These calls were originally directed elsewhere. Result is always rounded off.

**Totals**

- **Calls Overflowed Out Of Source** – total number of answered calls originally directed to the source group but answered elsewhere during the entire report interval.
- **Calls Overflowed Into Source** – total number of calls answered by the source ACD group regardless of where they originated during the entire report interval. Includes calls overflowed from another group, and calls that did not overflow and were directly answered.
All Positions Busy Reports

This report type offers two formats: For Full System or By ACD Group. The full system report summarizes data for all ACD groups and the By ACD group summarizes data for a single group selected. These reports detail the amount of time spent in a condition of all agent positions busy (APB). Each report lists the APB duration for each daily time increment and the percentage of that time increment that the condition existed.

REPORT FIELDS AND DEFINITIONS
- **Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **APB Time (seconds)** – duration of time in seconds that an All Positions Busy condition existed.
- **APB Time (hh:mm:ss)** – duration of time by hours, minutes, and seconds, that an All Position Busy condition existed.
- **Percent APB** – percentage of time that an All Position Busy condition existed.

Queue Full Reports

This report type offers two formats: Cumulative and By ACD Group. Reports detail the number of times a specific ACD group queue reaches its maximum size. The report lists the queue full duration for each daily time increment and includes the average and longest duration the condition existed.

REPORT FIELDS AND DEFINITIONS
- **Average Queue Full Time** – average queue full time for each archived period. The average time appears numerically, followed by a graphic representation using the time values referenced in the previous field. (Total queue full occurrence duration ÷ Number of queue full occurrences.)
- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Cumulative Percentages** – cumulative percentage of queue full occurrences, for each variable, compared to total queue full occurrences.
- **Longest Queue Full** – maximum queue full occurrence (in seconds) for each time interval.
- **Number of Occurrences Lasting [number] Seconds** – number of queue full occurrences by interval duration (in seconds). Numbers in the 40-second column represent queue busy conditions lasting within 40 seconds, and numbers in the 80-second column represent queue full occurrences lasting within that period (which is a 41 to 80 second time period).
- **Queue Full Deflects** – total number of calls that were deflected to the overflow destination due to a queue full condition.
- **Queue Full Occurrences** – number of times a queue full condition existed for the specified interval.
Time Delay Overflow Analysis Report

This report summarizes Time Delay Overflow (TDO) situations. Reports track TDO calls that were answered from the logical queue, between two groups: the source ACD group and the destination ACD group. Only answered calls are included in this report. Data is not shown for groups where no overflow activity occurred.

When the source and destination groups are the same, calls are answered from the group’s physical queue.

MATRIX REPORT

This report lists information in the form of a spreadsheet with destination ACD group information listed vertically and source ACD group information listed horizontally.

REPORT FIELDS AND DEFINITIONS

- **Calls Time Delay Overflowed Into Source** – indicates the number of calls that time delay overflowed from the destination ACD group(s) to the source group.
- **Calls Time Delay Overflowed Out Of Source** – indicates the number of calls that time delay overflowed from the source ACD group to the destination group.
- **Destination ACD Group** – ACD group Time Delay Overflow (TDO) calls were answered from the logical queue. Multiple destination groups may be shown. Call data for destination groups appears in horizontal rows on the matrix.
- **Source ACD Group** – ACD group to which calls were first directed. Call data for source groups appears in columns on the matrix.

Percentages

- **Calls TDO Out of Source** – percentage of ACD calls originated from the source ACD group and answered from another ACD group’s logical queue. Result is always rounded off.
- **Calls TDO Into Source** – percentage of TDO calls answered from the logical queue by the source ACD group. Result is always rounded off.

Totals

- **Calls TDO Out of Source** – total number of answered calls originated from the source group that were eventually answered from another group’s logical queue plus the number of calls answered from the source group’s physical queue (Source = Destination Calls).
- **Calls TDO Into Source** – total number of TDO calls answered from the logical queue by a specific destination group regardless of where they originated plus the number of calls answered from the sources group’s physical queue (Source = Destination Calls). 
  
  Note: If the destination ACD group equals the source ACD group and there is data in both the Calls Time Delay Overflowed Out Of Source and Calls Time Delayed Overflowed Into Source columns, note the following:
- **Calls Time Delayed Overflowed Out Of Source** – Calls Answered by the ACD Group
- **Calls Time Delayed Overflowed Into Source** – Calls Answered from Physical Queue by the ACD Group
# Time Delay Overflow Interval Report

This report tracks time delay overflowed calls answered from the logical queue based on source and destination group. It summarizes TDO situations by time intervals throughout a day. This report consists of a series of Time Delay Overflow Analysis Reports, one per archive interval.

## Report Fields and Definitions

- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Calls Time Delay Overflowed Out Of Source** – indicates the number of calls time delay overflowed from the source ACD group to the destination group(s).
- **Calls Time Delay Overflowed Into Source** – indicates the number of calls time delay overflowed from the destination ACD group(s) to the source group.
- **Destination ACD Group** – ACD group Time Delay Overflow (TDO) calls were answered from the logical queue. Multiple destination groups may be shown.
- **Source ACD Group** – ACD group to which calls were first directed. Each group prints separately in ascending numerical order by ACD DN.

### Interval Percentages

- **Calls Time Delay Overflowed Out Of Source** – percentage of ACD calls that overflowed from the source ACD group and answered from another ACD group’s logical queue during the archive interval. Result is always rounded off.
- **Calls Time Delay Overflowed Into Source** – percentage of TDO calls answered from logical queue by the source ACD group during the archive interval. Result is always rounded off.

### Interval Totals

- **Calls Time Delay Overflowed Out Of Source** – total number of answered calls originated from the source group that were eventually answered from another ACD group’s logical queue plus the number of calls answered from the source group’s physical queue (Source = Destination Calls) during the archive interval.
- **Calls Time Delay Overflowed Into Source** – total number of calls answered from logical queue by a specific destination group regardless of where they originated plus the number of calls answered from the source group’s physical queue (Source = Destination Calls) during the archive interval.

### Percentages

- **Calls Time Delay Overflowed Out Of Source** – percentage of all answered calls time delay overflowed from the source group. Result is always rounded off.
- **Calls Time Delay Overflowed Into Source** – percentage of all answered calls time delay overflowed into the source group. Result is always rounded off.

### Totals

- **Calls Time Delay Overflowed Out Of Source** – total number of calls time delay overflowed from the Source Group during the report interval.
- **Calls Time Delay Overflowed Into Source** – total number of calls time delay overflowed into the Source Group during the report interval.

**Note:** If the Destination ACD group equals the Source ACD group and there is data in both the **Calls Time Delay Overflowed Out Of Source** and **Calls Time Delayed Overflowed Into Source** columns, note the following:

- **Calls Time Delayed Overflowed Out Of Source** – Calls Answered by the ACD Group
- **Calls Time Delayed Overflowed Into Source** – Calls Answered from Physical Queue by the ACD Group
Transfer Analysis Report

This report tracks calls transferred between source and destination groups. Each report indicates calls transferred into an ACD group’s queue, as well as calls answered by one agent and then transferred to another agent’s ACD position (ACD DN). Only calls that are answered are included in this report. Data is not shown where no overflow activity occurred.

MATRIX REPORT

This report is included and prints automatically. It lists information in the form of a spreadsheet with destination ACD group information listed vertically and source ACD group information listed horizontally.

REPORT FIELDS AND DEFINITIONS

- **Calls Transferred Into Source** – indicates the number of calls transferred from the destination ACD group(s) to the source group.
- **Calls Transferred Out Of Source** – indicates the number of calls transferred from the source group to the destination group.
- **Destination ACD Group** – ACD group where transferred calls were answered from logical queue. Multiple destination groups may be shown. Call data for destination groups appears in horizontal rows on the matrix report.
- **Source ACD Group** – ACD groups to which calls were first directed. Call data for source groups appears in columns on the matrix report.
- **Total Calls Transferred** – Total number of transfer calls answered by a destination group regardless of where they originated (includes Source = Destination Calls). Represents the sum of all call counts in the row to the right of the destination group name and equals the total number of transfer calls answered.
- **Total Source Calls Transferred** – total number of calls transferred from a source group that were answered by the source (Source = Destination Calls) and/or other groups. Represents the sum of all call counts in the column.

Percents

- **Calls Transferred Out Of Source** – calculated percentage of ACD calls answered and then transferred by the source group. Result is always rounded off.
- **Calls Transferred Into Source** – calculated percentage of ACD calls handled by the source group that arrived from transferred call. This calculation adds the number of calls answered by transfer to the total number of calls answered to obtain a percentage of transfers based on total number of calls handled. Result is always rounded off.

Total Calls Answered

- **Calls Transferred Out Of Source** – total number of calls answered by the source group not including calls transferred into source.
- **Calls Transferred Into Source** – total number of calls answered by the source group regardless of where they originated.
Transfer Interval Report

This report tracks transfer calls based on source and destination groups. Each row indicates the transfer call data for a single archive interval. The report consists of a series of Transfer Analysis Reports, one per archive interval.

REPORT FIELDS AND DESCRIPTIONS

- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed (e.g. 06:30 – 07:00).
- **Calls Transferred Into Source** – indicates the number of calls transferred from the destination ACD group(s) to the source group.
- **Calls Transferred Out Of Source** – indicates the number of calls transferred from the source ACD group to the destination group.
- **Destination ACD Group** – ACD group where calls were answered. Multiple destination groups may appear for each time interval.
- **Source ACD Group** – ACD group to which calls were first directed. A separate report is generated for each group in the report scope.

Interval Percentages

- **Calls Transferred Into Source** - calculated percentage of ACD calls handled by the source group that arrived by transfer. This calculation adds the number of calls answered by transfer, to the total number of calls answered, to obtain a percentage of transfers based on the total number of calls handled. Result is always rounded off.
- **Calls Transferred Out Of Source** – calculated percentage of ACD calls answered and then transferred by the source group. Result is always rounded off.

Percentages

- **Calls Transferred Out Of Source** – percentage of all answered calls transferred from the source group.
- **Calls Transferred Into Source** – percentage of all answered calls transferred into the source group.

Total Answered

- **Calls Transferred Out Of Source** – total number of calls answered by the source group, not including calls transferred. (Sum of Total Answered for all intervals).
- **Calls Transferred Into Source** – total number of calls answered by the source group regardless of where they originated.

Total Calls Transferred

- **Calls Transferred Out Of Source** – total number of calls transferred from the source group and answered by a destination group, including calls transferred and answered by agents in the same group.
- **Calls Transferred Into Source** – total number of calls transferred into the source group regardless of where they originated, including calls transferred and answered by agents in the same group.
Group Primary DN Activity Graphic Reports

This report type offers two formats (applicable to UCLA): Cumulative and By ACD Group. Reports produce a pie chart that indicates the amount of time an ACD group spent on the following activities during a selected report period: Incoming, Clerical, Available Variable Wrap-up, and Outgoing Primary DN.

REPORT FIELDS AND DEFINITIONS

- **Incoming** – percentage of time an ACD group spent talking on incoming ACD calls.
- **Clerical** – percentage of time an ACD group spent performing clerical work, follow-up on ACD calls, by activating the Not Ready feature key.
- **Available** – percentage of time an ACD group spent ready to receive incoming ACD calls.
- **Variable Wrap-up** – percentage of time an ACD group spent in variable wrap-up mode, unavailable to answer ACD calls.
- **Outgoing Pri DN** – not applicable to UCLA CTS services.

Group Full Activity Graphic Reports

This report type offers two formats (applicable to UCLA): Cumulative and By ACD Group. Reports produce a bar graph that indicates the percentage of time an ACD group spent on the following activities: Available, Incoming, Clerical, Incoming Secondary DN, Outgoing Secondary DN, Variable Wrap-up, and Outgoing Primary DN.

REPORT FIELDS AND DEFINITIONS

- **Available** – percentage of time an ACD group spent ready to receive incoming ACD calls.
- **Incoming** – percentage of time an ACD group spent talking on incoming ACD calls.
- **Clerical** – percentage of time an ACD group spent performing clerical follow-up work on ACD calls, activating the Not Ready feature key.
- **Incoming Sec DN** – percentage of time the group spent talking on incoming secondary directory number calls.
- **Outgoing Sec DN** – percentage of time the group spent talking on outgoing secondary directory number calls.
- **Variable Wrap-up** – percentage of time an ACD group spent in variable wrap-up mode, unavailable to answer calls.
- **Outgoing Pri DN** – not applicable to UCLA IT Services.
Agent Report

The report details an individual agent’s performance based on the number, duration, and type of calls per day. The report also compares the agent’s performance against the average ACD group performance for the same day. The Agent Report updates agent login data every archive cycle. Login duration calculations require a start (agent login) and finish (agent logoff); however, durations for agents who are logged onto the system are updated as of the most recent archive cycle.

GRAPHIC REPORT - AGENT PRIMARY DN ACTIVITY

This report generates a pie chart that indicates the mount of time an agent spent on the following activities: Incoming, Clerical, Available, Variable Wrap-up, and Outgoing Primary DN. It prints as part of the Agent Report and cannot be printed alone.

REPORT FIELDS AND DEFINITIONS

- **Date** – date agent’s performance was measured and the ACD group(s) that the agent was logged into.
- **Dur** – total login time for the agent (in hours and minutes). The ACD group average for that date appears directly below the agent’s time.
- **In** – initial login time of the agent (24-hour format).

Allocation of Time (Pct)

- **PDN Avbl** – percentage of time the agent spent logged-in and was ready (available) to receive ACD DN calls.
- **PDN Incm** – percentage of time the agent spent on incoming ACD DN calls.
- **PDN Outg** – not applicable to UCLA IT Services.
- **Cler & VW** – percentage of time the Not Ready feature key was activated.
- **SDN Incm** – percentage of time the agent spent on incoming secondary directory number calls.
- **SDN Outg** – percentage of time the agent spent on outgoing secondary directory number calls.

Average Duration (hh:mm:ss)

- **PDN Incm** – average amount of time the agent spent on incoming ACD DN calls.
- **PDN Outg** – not applicable to UCLA IT Services.
- **PDN Cler** – average amount of time the Not Ready feature key was activated, which includes variable wrap-up time.
- **SDN Incm** – average amount of time the agent spent on incoming secondary directory number calls.
- **SDN Outg** – average amount of time the agent spent on outgoing secondary directory number calls.

Number of Calls (Count)

- **PDN Incm** – total number of incoming ACD DN calls received by the agent.
- **PDN Outg** – not applicable to UCLA CTS services.
- **SDN Outg** – total number of outgoing secondary directory number calls placed.
- **SDN Incm** – total number of incoming secondary directory number calls received.
- **Total** – agent’s combined incoming and outgoing calls.
- **PDN Cler** – number of times the Not Ready feature key was activated.

Graphic Report

- **Incoming** – percentage of time an ACD group spent talking on incoming ACD calls.
- **Clerical** – percentage of time an ACD group spent performing clerical follow-up on ACD calls, activating the Not Ready feature key.
- **Available** – percentage of time an ACD group was ready (idle) to receive incoming ACD calls.
- **Variable Wrap-Up** – percentage of time an ACD group spent in variable wrap-up mode, unavailable to answer calls.
- **Outgoing Pri DN** – not applicable to UCLA IT Services.
Agent Detail Report

The report presents a detailed daily record of a single agent's activity for a workday. It includes detailed data for each agent login session and total activity for all login sessions. Data is provided for: number of calls, number of occurrences (wrap-up, force out, etc.), average duration of call activities and allocation of time between primary and secondary DNs. Login duration calculations require a start (agent login) and finish (agent logoff); however, durations for agents who are logged on the system are updated as of the most recent archive cycle.

GRAPHIC REPORT – AGENT FULL ACTIVITY

This report generates a bar graph that indicates the percentage of time an agent spent on the following activities: Available, Clerical, Incoming, Incoming SDN, Outgoing SDN, Variable Wrap-up, and Outgoing. It prints as part of the Agent Full Activity Graphic Report and cannot be printed alone.

REPORT FIELDS AND DEFINITIONS

- **In** – agent login time in 24-hour format (hh:mm).
- **Out** – agent logoff time in 24-hour format (hh:mm).
- **Dur** – login duration in 24-hour format (hh:mm).
- **Group** – ACD group that the agent was logged into listed by the ACD pilot number. A summary of all groups included is listed in detail at the end of the report.

Number of Calls

- **PDN Incm** – number of incoming ACD DN calls received by agent during this session.
- **PDN Outg** – not applicable to UCLA IT Services.
- **SDN Incm** – number of incoming secondary directory number calls received during this session.
- **SDN Outg** – number of outgoing secondary directory number calls made during this session.

Number of Occurrences

- **Cler** – number of times the Not Ready feature key was activated.
- **Call Supv** – number of times the agent requested supervisory assistance by pressing the Call Supervisor feature key.
- **Var Wrap** – number of times the agent went into variable wrap-up mode.
- **Frce Out** – number of times the agent was forced off of the ACD group.

Average Duration (mm:ss)

- **PDN Incm** – average amount of time the agent spent on incoming ACD DN calls.
- **PDN Outg** – not applicable to UCLA IT Services.
- **SDN Incm** – average amount of time the agent spent on incoming secondary directory number calls.
- **SDN Outg** – average amount of time the agent spent on outgoing secondary directory number calls.
- **Cler** – average amount of time the agent spent in Not Ready, including Variable Wrap-up mode.
- **Call Supv** – average amount of time the agent spent on a supervisor call via the Call Supervisor feature key.

Graphic Report

- **Available** – percentage of time an agent spent ready (idle) to receive incoming ACD calls.
- **Clerical** – percentage of time the Not Ready feature key was activated.
- **Incoming** – percentage of time an agent spent handling incoming ACD DN calls.
- **INCM_SDN** – percentage of time an agent spent handling incoming secondary directory number calls.
- **OUTG_SDN** – percentage of time an agent spent handling outgoing secondary directory number calls.
- **VAR_Wrap** – percentage of time an agent spent in variable wrap-up mode.
- **Outgoing** – not applicable to UCLA CTS services.
Agent Performance Report

This report measures agent performances based on login duration, the number of incoming and outgoing calls, and the duration and percentage of workload for the reporting period. Report accuracy depends upon agents logging in and out for lunch breaks, abbreviated workdays, etc. Reports retrieve agent data from a login to logout period; therefore, report data cannot be retrieved for agents who fail to logout for the day. Login duration calculations require a start (agent login) and finish (agent logoff); however, durations for agents who are logged on the system are updated as of the most recent archive cycle.

REPORT FIELDS AND DEFINITIONS
- **Agent** – agent’s name as it is recorded under Agent Records.
- **Login Dur** – total agent login time (hours/minutes) for the reporting period.
- **PIN** – agent’s Personal Identification Number used to login to the ACD group.

Number of Calls
- **PDN Incm** – total number of incoming ACD DN calls received by the agent.
- **PDN Outg** – not applicable to UCLA IT Services.
- **SDN Incm** – total number of incoming secondary directory number calls received by the agent.
- **SDN Outg** – total number of outgoing secondary directory number calls made by the agent.
- **Total** – agent’s combined incoming and outgoing calls.

Average Duration (hh:mm:ss)
- **PDN Incm** – average amount of time the agent spent on ACD DN calls.
- **PDN Outg** – not applicable to UCLA IT Services.
- **SDN Incm** – average amount of time the agent spent on incoming secondary directory number calls.
- **SDN Outg** – average amount of time the agent spent on outgoing secondary directory number calls.
- **Cler** – average amount of time the agent spent in Not Ready; does not include variable wrap-up time.

Allocation of Time (%)
- **Avbl** – percentage of time the agent spent logged-in and ready (available) to receive ACD calls.
- **PDN Incm** – percentage of time the agent spent on incoming ACD calls.
- **PDN Outg** – not applicable to UCLA IT Services.
- **Cler & VW** – percentage of time the agent spent in clerical and variable wrap-up mode.
- **SDN Incm** – percentage of time the agent spent on incoming secondary directory number calls.
- **SDN Outg** – percentage of time the agent spent on outgoing secondary directory number calls.

Short Calls Report

This report details an agent’s ACD calls, within the short call duration, which is entered under Time Values for Archive Data menu. A short call indicates that the incoming caller was disconnected within seconds after the agent answered the call and may warrant investigation. The report lists ACD group agents by Personal Identification Number (PIN), agent name, and the number and duration of short calls. The bottom line provides the average number of short calls for the group and the average login and short call durations.

REPORT FIELDS AND DEFINITIONS
- **Agent** – agent’s name as it is recorded under Agent Records.
- **Average Short Call Duration** – average length of the agent’s short calls (minutes/seconds).
- **Logged On Duration (hh:mm:ss)** – amount of time an agent was logged on to the ACD group.
- **Number of Short Calls** – number of calls an agent answered and serviced at or below the defined short call duration.
- **PIN** – agent’s Personal Identification Number used to login to the ACD group.
Agent Deviation Graphic Report

This report compares average performances for the categories listed below. A single agent selected as a target can be compared to another agent, a group, or all groups (depending on the selected reference). A single group can be compared with another group or all groups. Report values are derived using the following formula: $\{(a \div b) - 1\} \times 100$ where $a$ and $b$ are defined below.

REPORT FIELDS AND DEFINITIONS

- **Average Clerical Time per Call** - The average amount of time the agent’s Not Ready feature key was activated compared to the number of incoming ACD calls.
  a. Reference clerical time ÷ Reference number of incoming ACD calls
  b. Target clerical time ÷ Target number of incoming ACD calls
- **Average Free per Incoming Call** - The average amount of time available to receive incoming ACD calls compared to the number of incoming ACD calls.
  a. Available Time ÷ Reference number of incoming ACD calls
  b. Target Available Time ÷ Target number of incoming ACD calls
- **Average Variable Wrap-up per Call** - The percentage of time an ACD group spent in variable wrap-up mode, unavailable to answer calls.
  a. Reference variable wrap-up time ÷ Reference number of incoming ACD calls
  b. Target variable wrap-up time ÷ Target number of incoming ACD calls
- **Percentage Deviation** - The vertical numeric reference percentage to compare to the target agent bar performance.

- **Frequency of Incoming ACD Calls**
  a. Target total of logged-on duration ÷ Target number of incoming ACD DN calls
  b. Reference total of logged-on duration ÷ Reference number of incoming ACD DN calls
- **Duration of Incoming Calls**
  a. Reference of incoming ACD time ÷ Reference number of incoming ACD DN calls
  b. Target of incoming ACD time ÷ Target number of incoming ACD DN calls
- **Frequency of Sec [Secondary] Incoming Calls**
  a. Target total of logged-on duration ÷ Target number of incoming SDN calls
  b. Reference total of logged-on duration ÷ Reference number of incoming SDN calls
- **Duration of Sec [Secondary] Incoming Calls**
  a. Reference of incoming secondary DN time ÷ Reference number of incoming SDN calls
  b. Target of incoming secondary DN time ÷ Target number of incoming SDN calls
- **Frequency of Outgoing Sec [Secondary] DN Calls**
  a. Target total of logged-on duration ÷ Target number of outgoing SDN calls
  b. Reference total of logged-on duration ÷ Reference number of outgoing SDN calls
- **Duration of Outgoing Sec [Secondary] DN Calls**
  a. Reference outgoing SDN time ÷ Reference number of outgoing SDN calls
  b. Target outgoing SDN time ÷ Target number of outgoing SDN calls
- **Frequency of Outgoing Pri [Primary] DN Calls** - Not applicable to UCLA IT Services.
- **Duration of Outgoing Pri [Primary] DN Calls** - Not applicable to UCLA IT Services.
Report Description

Line Of Business Summary Reports

This report type offers four formats (applicable to UCLA): Cumulative, By ACD Group, By DN, and By Agent. It tracks the number and length of calls received that were associated with a three-digit LOB code. These reports also indicate the percentage of calls associated with a specific LOB. The “1000” code includes data for LOB codes that have not been defined by the call center within the remote terminal.

GRAPHIC REPORT

Included with each LOB Summary Report and cannot be printed alone. This report graphically depicts the average duration associated with each LOB code encompassed by the report scope.

REPORT FIELDS AND DEFINITIONS

- **Average Duration** – average length of calls associated with this LOB code (hh:mm:ss).
- **Calls Completed** – number of calls completed during the reporting period.
- **Description** – LOB code description entered under System Descriptions menu.
- **Duration** – horizontal on graphic representing the total duration for calls with this LOB code.
- **LOB Call %** – percentage of calls associated with the specified LOB code compared to the total calls completed during the reporting period.
- **LOB Count** – number of calls associated with the specified LOB code and completed during the reporting period.
- **LOB Dur %** – percentage of call duration associated with this LOB code as a percent of duration of all calls.
- **Maximum Duration** – longest call length for calls associated with this LOB code (hh:mm:ss).
- **Totals** – columns containing counts or durations (rather than percentages). Total represents sum of the data for all LOB codes. For columns containing percentages, Total represents cumulative percentages for all LOB codes.

Line Of Business Detail Reports

This report type offers four formats (applicable to UCLA): Cumulative, By ACD Group, By DN, and By Agent. It presents the number and duration of calls answered for a particular LOB code. This report provides this data for LOB codes used in half-hour periods. If a call lasted longer than a half-hour, the report shows call data for the half-hour in which the call was completed. The “1000” code includes data for LOB codes that have not been defined by the call center within the remote terminal.

REPORT FIELDS AND DEFINITIONS

- **Average Duration** – average length of calls associated with this LOB code (hh:mm:ss).
- **Calls Completed** – number of calls completed during the reporting period.
- **Description** – LOB code description entered under System Descriptions menu.
- **LOB Code** – three-digit Line Of Business code number entered under System Descriptions menu.
- **LOB Call %** – percentage of calls associated with the specified LOB code compared to the total calls completed.
- **LOB Count** – number of calls associated with the specified LOB code and completed during the reporting period.
- **LOB Dur %** – percentage of call duration associated with this LOB code as a percent of duration of all calls.
- **Maximum Duration** – longest call length for calls associated with this LOB code (hh:mm:ss).
- **Time of Day** – identifies the time interval for which the statistics are displayed.
- **Totals** – Total represents sum of the data for all LOB codes for columns containing counts or durations rather than percentages. For columns containing percentages, Total represents cumulative percentages for all LOB codes.
Line Of Business Agent vs. Group Report

This report type is offered by Agent. It compares agent use of an LOB code versus the ACD group's use. The report provides number and duration of calls associated with specific LOB codes. The “1000” code includes data for an LOB code that has not been defined by the call center in the remote terminal.

REPORT FIELDS AND DEFINITIONS

- **Agent Totals** – columns containing counts or durations (rather than percentages), Total represents sum of the data for all LOB codes. For columns containing percentages, Total represents cumulative percentages for all LOB codes.
- **Average Duration** – average length of calls associated with this LOB code (hh:mm:ss).
- **Calls Completed** – number of calls completed during the reporting period.
- **Description** – LOB code description entered under System Descriptions menu.
- **Group Averages** – columns containing counts or durations (rather than percentages), Total represents sum of the date for all LOB codes. For columns containing percentages, Total represents cumulative percentages for all LOB codes based on agents per day.
- **LOB Call %** – percentage of calls associated with the specified LOB code compared to the total calls completed.
- **LOB Code** – three-digit Line Of Business code number entered under System Descriptions menu.
- **LOB Count** – number of calls associated with the specified LOB code and completed during the reporting period.
- **LOB Dur %** – duration of calls with this LOB code as a percent of duration of all calls.
- **Maximum Duration** – longest call length for calls associated with this LOB code (hh:mm:ss).

Closed Key Walkaway Summary Reports

This report type offers four formats (applicable to UCLA): Cumulative, By ACD Group, By DN, and By Agent. It tracks the amount of time spent in specific CKW conditions, along with the number and duration of these events. The “1000” code includes data for a CKW code that has not been defined by the call center in the remote terminal.

GRAPHIC REPORT

Included with each CKW Summary Report and cannot be printed alone. This report graphically depicts the average duration associated with each CKW code encompassed by the report scope.

REPORT FIELDS AND DEFINITIONS

- **Average Duration** – average time of CKW occurrences using this code (hh:mm:ss).
- **CKW Code** – three-digit Closed Key Walkaway code entered under System Descriptions menu.
- **Count** – number of CKW events associated with the CKW code.
- **Description** – CKW code description entered under System Descriptions menu.
- **Duration** – appears horizontally on the graphic report showing total duration for calls with this CKW code.
- **Percentage of CKW Time** – amount of time in a specified CKW condition compared to time spent in all CKW conditions.
- **Percentage of Logged-On Time** – amount of time spent in the specified CKW condition compared to total time logged on to the ACD.
Closed Key Walkaway Detail Reports

This report type offers three formats (applicable to UCLA): Cumulative, By ACD Group, and By Agent. It presents the number and duration of events associated with a particular CKW code. This report provides this data for CKW codes used in half-hour periods. If a CKW condition lasted longer than a half-hour, the report shows CKW code data for the half-hour in which the CKW event was completed. The “1000” code includes data for a CKW code that has not been defined by the call center in the remote terminal.

REPORT FIELDS AND DEFINITIONS

- **Average Duration** – average time (hh:mm:ss) of CKW occurrences using this code.
- **CKW Code** – three-digit Closed Key Walkaway code entered under System Descriptions menu.
- **Call Arrival Time of Day** – identifies the time interval for which the statistics are displayed.
- **Count** – number of CKW events associated with the CKW code during the specified half-hour period.
- **Description** – CKW code description entered under System Descriptions menu.
- **Duration** – actual length of time (hh:mm:ss) spent in the specified CKW condition for the specified half-hour period.
- **Totals** – total count and duration provided. Total for Average Duration equals an average of individual averages.

Closed Key Walkaway Agent vs. Group Report

This report type is offered By Agent. It compares agent use of a CKW code versus the group’s use of the code. The report provides number and duration of calls associated with specific CKW codes. The “1000” code includes data for a CKW code that has not been defined by the call center in the remote terminal.

REPORT FIELDS AND DEFINITIONS

- **Agent Totals** – columns containing counts or durations (rather than percentages). Total represents sum of the data for all CKW codes. For columns containing percentages, Total represents cumulative percentages for all CKW codes.
- **Average Duration** – average time (hh:mm:ss) for the specified agent using the CKW code.
- **CKW Code** – three-digit Closed Key Walkaway code entered under System Descriptions menu.
- **Count** – number of CKW events associated with the CKW code for the specified agent.
- **Description** – CKW code description entered under System Descriptions menu.
- **Group Averages** – shows average for the group in each category (group totals divided by number of agents in the group). Includes all agents who worked in any group in which the specified agent also worked during the same day.
- **Percent of CKW Time** – amount of time in the CKW condition as a percent of total time spent in all CKW conditions.
- **Percentage of Logged-On Time** – amount of time in the specified CKW condition as a percent of total time.
Printing Reports

The ACD MIS remote terminal offers in-depth historical reporting of your call center. It provides standard reporting functions to allow you to quickly generate reports based on data selected using standard report templates.

Reports are locally produced on the remote terminal using data that is downloaded from the IT Services ACD MIS Host into non-editable Crystal Report templates. Reports are generated based on selections you make for data requirements. The View/Modify Reports permission is required to access the Report application menu, which provides menu selections to create, modify, or delete private and public custom reports.

Crystal Reports is the reporting tool for data conversions, report design, display and printout. Crystal Reports software is included with the ACD MIS For Windows package. Reports can be printed daily, weekly, or monthly. A yearly option is available, however, only up to six months of data can be retrieved from the IT Services ACD MIS Host.

Reports can be printed on demand or scheduled to print when using Report Groups. Report Groups are a convenient way to maintain a list of reports that can be set to print automatically.

When specifying a report scope avoid downloading huge quantities of data. Lengthy downloads affect disk space required on both the IT Services ACD MIS Host and the ACD MIS For Windows remote terminal, and impact transmission times between the host your remote terminal.

Because report data is stored on your remote terminal, data must be periodically purged to avoid any possible out-of-space disk problems.

On Demand Printing

Examples are used below but windows will vary based on the report type selected.

1. Click on Main Menu
2. Select Reports, then Print/Display Reports, and then click on report category you wish to select (i.e., Agent Reports); Reports window appears
3. Double click on desired report type from report list (i.e., Agent Report); Specify Report Scope window appears
4. Define report scope by selecting appropriate report tables: Group Tables, Agent Tables, Date, Days, and Shifts (if applicable)
5. Click on Print Report to print report or Display Report if you only want to view report on screen; Report Background Server Status window displays to indicate report is being generated
6. Click OK on report completed dialog box
7. Repeat steps 3-6 to generate another report or close window
Report Groups

Report groups consist of one or more reports that can be scheduled for printout immediately, hourly, daily, weekly, monthly or once only. They are a convenient way to maintain a list of reports that you use frequently. Reports print in the order displayed in the Reports in this group field. Click OK from the Report Group window at any time to save your settings.

CREATE A REPORT GROUP

Select Reports

1. Click on Main Menu
2. Select Reports, then click on Report Groups
3. Click on Add button on Main Toolbar; Report Group window appears
4. Click in Report Group Name field and enter name of your new report group
5. Click on Run Destination field and select location; a Run Destination is the remote terminal computer where reports in this Report Group should be generated – setting a run destination other than LOCAL MACHINE limits print options to the default printer
6. Select desired report type from General tab, Report Types drop-down menu
7. Click on report title, then click Add>> button to include this report in report group
8. Repeat steps 6-8 for each report you wish to add to this report group; all reports added to group appear in Reports in this group: window

Set Scope

11. Click on first report title in Reports in this group: window
12. Click on Scope button
13. Define report scope by selecting appropriate report tables: Group Tables, Agent Tables, Date, Days, and Shifts (if applicable)
14. Click on Update Scope button to save selections
15. Repeat steps 11-14 for each report in Reports in this group: window
16. Click OK from Report Group window to save settings

To schedule this report group to print automatically, refer to Schedule A Report Group instructions on the following page.

Alter Print Order

9. View report sequence in Reports in this group: window
10. Click on Up or Down buttons to change print order
SCHEDULE A REPORT GROUP
1. Click on Main Menu
2. Select Reports, then click on Report Groups; a listing of existing Report Groups is displayed
3. Double click on Report Group name you wish to schedule; Report Group window appears
4. Click on Schedule tab
5. Click on drop-down arrow under Report Group Schedule: field and select desired option; different fields are displayed on Schedule tab based on selection:
   - **Print Immediately** – this report group is printed immediately and the schedule is automatically changed to None.
   - **Print Hourly** – set the time of the first report cycle, the number of report cycles, and the days of the week the Report Group should print. For example, if Number of Reports is set to 4, and Time of First Report is set at 08:00, this report group will print at 08:00 a.m., 09:00 a.m., 10:00 a.m. and 11:00 a.m. for the days of the week specified.
   - **Print Daily** – enter the time of day and the days of the week this Report Group should print.
   - **Print Monthly** – enter the time of day and the day of the month this Report Group should print. Enter 0 (zero) in the Day of the Month field to have the report group print on the last day of the month.
   - **Print Once Only** – enter the time of day and the date this Report Group should print. The printout occurs only on the date/time specified and is not repetitive.
6. Set schedule options for this report group, then click OK to save settings and return to Reports Window

REMOVE A REPORT GROUP
1. Click on Main Menu
2. Select Reports, then click on Report Groups; a listing of existing Report Groups is displayed
3. Click on Report Group Name you wish to delete
4. Click on **Remove** button from Main Menu Toolbar
5. Click OK to confirm and remove Report Group

MODIFY A REPORT GROUP
1. Click on Main Menu
2. Select Reports, then click on Report Groups; a listing of existing Report Groups is displayed
3. Double click on Report Group Name you wish to modify; Report Group window appears
4. Select necessary tabs or fields to modify settings or schedules, change the report group name, or add/delete reports listed to print
5. Click OK when satisfied with entries

Purge Local Data
This option removes all report data previously downloaded from the CTS ACD MIS Host that was stored on your remote terminal computer hard disk. It is recommended that you periodically purge local data to prevent the hard disk from filling up.

PURGE DATA
1. Click on **Reports** button from Main Toolbar
2. Click on Local Data Management from Reports Menu, then click on Purge Local Data
3. Click on Yes to confirm request

Note: When a day of the week has been enabled for an hourly or daily schedule, a checkmark appears in the box next to Select Which Day(s) of the Week.
Time Values For Archive Data

This enables you to specify custom parameters for the reporting options noted below for each ACD group assigned to your application. Changes become effective at midnight (IT Services ACD host time). The Today tab shows the current settings in a read-only window whereas the Tomorrow tab is used to make modifications.

FIELD DESCRIPTIONS

- **Group Name** - a drop down list of ACD group names available to change archive data.
- **Grade Of Service (GOS) Calculation** - Grade of Service evaluates an ACD group’s efficiency by calculating the percentage of calls answered in less than or equal to a given period of seconds. To determine what your ACD group’s GOS should be, enter the maximum amount of seconds you want calls to wait before an agent answers them. The default setting is 25 seconds.
- **Real-Time Data Calculation Interval** - value entered in this field determines the duration of time for the Real-Time Display Interval period, which appears in the data box windows. The default setting is 30 minutes.
- **Abandoned Ignored Time** - sets the minimum allowable duration (in seconds) for call abandoned statistical reporting. Calls that are abandoned in less than this value of time do not appear on reports or in abandoned counts on the Real-Time Display. The default setting is 0 seconds.
- **Short Calls Time** - minimum duration (in seconds) of valid ACD calls. Call durations at or below this value point appear as short calls on the Short Calls Report. The default setting is 10 seconds.
- **Report Time Intervals** - specifies time intervals or “buckets” for the following report fields: Time to Abandon, Time to Answer, Call Duration, and Queue Busy. Values appear as column headers in interval reports. These time intervals also set the ruling marks for graphic reports. For example, if you have set time intervals of 20, 40, 60, 80, and 100 seconds, a call that is answered within 30 seconds would be grouped with the 40-second interval on reports or would show a color bar between 20 and 40 seconds on a graphic report.

- **Count Transferred Calls as Calls Offered** - allows you to enable or disable the counting of transferred calls as calls offered. These are not calls that are transferred between agents. These are calls that are considered transferred by the IT Services telephone system because they go to another piece of equipment before reaching the ACD group. Automated Attendant calls routed to an ACD group are calculated as Transferred Calls. Note: If transferred calls are not counted as calls offered, they will not be included in any totals on Incoming Calls reports.
- **Archive Line Of Business (LOB) Code Data** - allows you to enable or disable the archiving of LOB codes for this ACD group.
- **Archive Closed Key Walkaway (CKW) Code Data** - allows you to enable or disable the archiving of CKW codes for this ACD group.

MODIFY TIME VALUES FOR ARCHIVE DATA

1. Click on **Main Menu**
2. Select System Configuration, then **Time Values for Archive Data**, and then click on **View/Modify Time Values For Archive Data**
3. View current settings under **Today** tab
4. Click on **Tomorrow** tab to make modifications
5. Click on **Group Name** drop-down arrow and select ACD group you wish to modify
6. Click on field box for item you wish to change
7. Click on **Save** button on **Main Toolbar** to save changes
8. Close window
Monitor Groups

Monitor Groups allow you to monitor a group of ACD agents in the Agent Activity Data Window regardless of their assigned ACD group. This feature is helpful when managing two or more ACD groups within one application. It offers an effective way to monitor a group of agents in real-time or by way of historical reporting.

When agents are assigned to a monitor group, they continue to be members of their original ACD groups; it can be any number of agents grouped together for special tracking and monitoring. A maximum of eight monitor groups can be viewed from your remote terminal.

Once created, a Monitor Group is added to the Monitor Group Alarms Menu where alarms can be set. Refer to Alarms within this section of the user guide for more information.

Monitor Groups are also available in the report selection menus when pulling standard agent reports.

To view a monitor group in the Agent Activity Data Window, click on the Monitor Groups button on the Real-Time Display Toolbar.

CREATE A MONITOR GROUP

1. Click on Main Menu
2. Select System Configuration, then click on Monitor Groups; View/Modify Monitor Groups window appears
3. Click on Add button on Main Toolbar or on blank Namefield; cursor is positioned within a new row in window
4. Enter new group name in Name field that will appear on Agent Activity Data Window (maximum of eight characters)
5. Click on Description field, then enter a description for this group (maximum 30 characters)
6. Double-click on new Name to open agent entry window
7. Click on Monitor Groups drop-down arrow to display list of groups from which agents may be selected
8. Click on All Agents to view list of agents
9. Click on checkbox for each agent name you wish to add to the new group; a ✓ indicates agent has been selected
10. Click OK to add agent(s) to group; View/Modify Monitor Groups – Agents* window appears with changes
11. Click on Save button on Main Toolbar to save changes
12. Close window
**System Configuration**

**REMOVE A MONITOR GROUP**
1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Monitor Groups**; View/Modify Monitor Groups window appears
3. Click on group Name to be deleted
4. Click on **Remove** button on **Main Toolbar**
5. Click **OK** to confirm removal
6. Click on **Save** button on **Main Toolbar** to save changes
7. Close window

**MODIFY MONITOR GROUP NAME OR DESCRIPTION**
1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Monitor Groups**; View/Modify Monitor Groups window appears
3. Click on group **Name** or **Description** field, then enter new information to make changes
4. Click on **Save** button on **Main Toolbar** to save changes

**ADD AGENTS TO A MONITOR GROUP**
1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Monitor Groups**; View/Modify Monitor Groups window appears
3. Double-click on group Name for which you wish to add agents; View/Modify Monitor Groups – Agents window appears
4. Click on **Add** button on **Main Toolbar**; Add Agents window appears
5. Click on **Monitor Groups** drop-down arrow to display list of groups from which agents may be selected
6. Click on **All Agents** to view list of agents
7. Click on checkbox for each agent name you wish to add; a ✔ indicates agent has been selected
8. Click **OK** to add agent(s) to group; View/Modify Monitor Groups – Agents* window appears with changes

9. Click on **Save** button on **Main Toolbar** to save changes
10. Close window

**REMOVE AGENTS FROM A MONITOR GROUP**
1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Monitor Groups**; View/Modify Monitor Groups window appears
3. Double-click on group Name for which you wish to remove agents; View/Modify Monitor Groups – Agents window appears
4. Click on agent information (PIN, Initials, or Full Name) that you wish to delete
5. Click on **Remove** button on **Main Toolbar**
6. Click **OK** to confirm and remove agent
7. Click on **Save** button on **Main Toolbar** to save changes
8. Close window
Shift Definitions and Assignments

Shift Definitions provide the ability to define a work shift and then assign it to an ACD group for ease of reporting. This is helpful when your call center is running multiple shifts such as morning (7 a.m. to 3 p.m.), evening (3 p.m. to 11 p.m.), and graveyard (11 p.m. to 7 a.m.). When generating reports, a separate report for each defined shift is included.

A WORK SHIFT MUST MEET THE FOLLOWING CRITERIA:

- Each shift is marked by a start time and an end time, in half-hour intervals
- A shift can span calendar days, for instance 6:00 p.m. till 2:00 a.m.
- Multiple shifts can overlap within the same day
- Each shift is identified by a unique name, containing up to ten alphanumeric characters
- Eight different shifts can be assigned to an individual ACD group
- A single shift may be assigned to any number of ACD groups
- Once created, a shift cannot be deleted; it can be retired

Each shift may be assigned, unassigned, retired (removed) or unretired (reinstated). Newly created shifts default to unassigned status. Only active shifts (assigned or unassigned status) display on the View/Modify Shift Definitions window and can be assigned to ACD groups. A shift that is no longer in use and unassigned may be marked as retired. Retired shifts do not appear on the View/Modify Shift Definitions window; they can be unretired at any time for reuse. Up to eight shifts can be assigned to an ACD group.

Important Note: Except for the shift name, no other shift parameters can be modified after a shift has been created. If shift parameters must be changed, you must retire the shift and create a new shift with the desired parameters.

ADD A SHIFT

1. Click on Main Menu
2. Select System Configuration, then click on Shift Definitions; View/Modify Shift Definitions window appears
3. Click on Add button from Main Toolbar; Add A Shift window appears

Add A Shift

- Add New Shift
- Unassign Shift

Shift Name: Weekend
Start Time: 07:00
Stop Time: 15:00
Days of Week:
- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

4. Click on Add New Shift radio button
5. Enter name of new shift in Shift Name field (maximum 10 characters)
6. Enter shift start time by clicking on up/down arrow of Start Time field to scroll to desired time (24-hour format - HH:MM)
7. Enter shift end time by clicking on up/down arrow of Stop Time field to scroll to desired 24-hour format (HH:MM)
8. Click on checkboxes for each day you want included for this shift under Days Of Week field
9. Click OK to add new shift
10. Click Yes to confirm shift addition
11. Click on Save button on Main Toolbar to save changes
12. Close window
**MODIFY A SHIFT NAME**

1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Shift Definitions**; View/Modify Shift Definitions window appears
3. Click on name of shift in **Shift Name** field that you wish to change, then enter new information
4. Click on **Save** button on **Main Toolbar** to save changes
5. Close window

**RETIRE [REMOVE] AN UNASSIGNED SHIFT**

1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Shift Definitions**; View/Modify Shift Definitions window appears
3. Click on name of shift in **Shift Name** field that you wish to retire (only Unassigned shifts can be retired)
4. Click on **Remove** button on **Main Toolbar**
5. Click **OK** to confirm removal
6. Click on **Save** button on **Main Toolbar** to save changes
7. Close window

**UNRETIRE [REINSTATE] A SHIFT**

1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Shift Definitions**; View/Modify Shift Definitions window appears
3. Click on any name that appears under **Shift Name** field
4. Click on **Add button from Main Toolbar**; Add A Shift window appears
5. Click on **Unretire Shift** radio button; all retired shifts appear in window below
6. Click on shift to be unretired, then click **OK**
7. Click **Yes** to confirm
8. Click on **Save** button on **Main Toolbar** to save changes
9. Close window
ASSIGN A SHIFT TO AN ACD GROUP

1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Shift Assignment**; View/Modify Shift Assignment window appears
3. Click on **Group** field drop-down arrow to display ACD groups
4. Click on ACD group name you wish to assign a shift
5. Click on **Add** button on **Main Toolbar**
6. Select shift to be assigned, then click OK; shift assignment appears
7. Click on **Save** button on **Main Toolbar** to save changes
8. Repeat steps 5-7 for additional shifts - or - Close window

UNASSIGN A SHIFT

1. Click on **Main Menu**
2. Select **System Configuration**, then click on **Shift Assignment**; View/Modify Shift Assignment window appears
3. Click on **Groups** field drop-down arrow to display ACD groups
4. Click on ACD group name you wish to unassign a shift
5. Click on shift to be unassigned
6. Click on **Remove** button on **Main Toolbar**
7. Click **OK** to confirm
8. Click on **Save** button on **Main Toolbar** to save changes
9. Close window

Alarms

Alarms consist of Real-Time Display data fields that are available for alarm notification. Alarms provide immediate, visual notification if an ACD group or agent performs below set values levels. All alarm states are calculated using data that is tracked by the Interval (INT) period only.

Time values can be entered in any numerical format (seconds, minutes:seconds, or hours:minutes:seconds), but they will be automatically converted to hours:minutes:seconds (hh:mm:ss). Entering a value of zero (0) turns an alarm off.

The Alarm Toolbar is used to view alarm conditions set for queue parameters, agent positions, and emergency feature keys (Adherence Alarm not applicable to UCLA). The alarm lights switch from gray to red as alarm conditions occur. The toolbar is located (by default) on the right side of the Main Toolbar in the Real Time Display. It can be undocked, moved, or hidden using the View option on the Menu Bar.
**AGENT POSITION ALARMS**

Sets alarm values for the Agent Activity Data Window and Agent Activity Data Box on the Real-Time Display. Visual alarm notification appears if agent activity conditions equal or exceed the values entered on this window. The values entered do not affect or control any parameters with the ACD telephone system.

All fields default to zero. A zero value disables an alarm. A maximum of 32,400 seconds (9 hours) can be set for an alarm value. Time can be entered in any numerical format (seconds, minutes:seconds, or hours:minutes:seconds) but will be automatically converted to hours, minutes, and seconds (hh:mm:ss) by the remote terminal.

**SET AGENT POSITION ALARMS**

1. Click on **Main Menu**
2. Select **System Configuration**, then **Alarms**, and then click on **Agent Position Alarms**; View/Modify Agent Position Alarms window appears
3. Locate ACD group you wish to set an agent position alarm
4. Click in desired data field (PDN Busy In, PDN Wrap Up, etc.), then enter new value
5. Repeat steps 3-4 for each group and field you wish to set
   - or -
   Click on **Save** button on **Main Toolbar** to save changes
6. Close window

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**CKW ALARMS**

Closed Key Walkaway (CKW) alarms signal when an agent has remained in a specific CKW state for too long. CKW alarms are used to specify a CKW code range and a time interval for when the alarm is triggered.

If a three-digit CKW code (entered by an agent) falls within the Minimum and Maximum values set, a timer is started. If the timer expires before the agent becomes available to answer another call, an alarm is indicated in the Agent Activity Data Window of the Real-Time Display.

Time can be entered in any numerical format (seconds, minutes:seconds, or hours:minutes:seconds) but will be automatically converted to hours, minutes, and seconds (hh:mm:ss) by the remote terminal.

**SET CKW ALARMS**

1. Click on **Main Menu**
2. Select **System Configuration**, then **Alarms**, and then click on **CKW Alarms**; View/Modify CKW Alarms window appears
3. Click on **Group Name** drop-down arrow and select desired ACD group
4. Click on first available Range field and enter name (i.e., “break”)
5. Click on **Minimum CKW Code** field and enter three-digit code for beginning of the range
6. Click on **Maximum CKW Code** field and enter three digit code for end of the range
7. Click on **Alarm Value** field and enter maximum amount of time allowed for a CKW state within the range
8. Repeat steps 4 - 7 for additional ranges
   - or -
   Click on **Save** button on **Main Toolbar** to save changes
ACD GROUP ALARMS

Sets alarm values for the Queue Activity Data Window and Queue Activity Data Box on the Real-Time Display. Visual alarm notification appears if call center conditions deviate from the values entered. The values entered do not affect or control any parameters within the ACD telephone system.

All fields default to zero. A zero value disables an alarm. A maximum of 32,400 seconds (9 hours) can be set for an alarm value. Time can be entered in any numerical format (seconds, minutes:seconds, or hours:minutes:seconds) but will be automatically converted to hours, minutes, and seconds (hh:mm:ss) by the remote terminal.

SET ACD GROUP ALARMS
1. Click on **Main Menu**
2. Select **System Configuration**, then **Alarms**, and then click on **ACD Group Alarms**; View/Modify ACD Group Alarms window appears
3. Locate ACD group you wish to set an alarm
4. Click in desired data field (GOS, ASA, etc.), then enter new value
5. Repeat steps 3-4 for each group and field you wish to set
   - or -
   Click on **Save** button on **Main Toolbar** to save changes
6. Close window

MONITOR GROUP ALARMS

Sets alarm values for Monitor Groups appearing in the Agent Activity Data Window, Agent Activity Data Box, and Agent Detail Window on the Real-Time Display. Monitor Group alarms may be used to redefine alarm settings for agents in training or for special call center applications.

Visual alarm notification appears if call center conditions deviate from the values entered. The values entered do not affect or control any parameters within the ACD telephone system. All fields default to zero.

All fields default to zero. A zero value disables an alarm. A maximum of 32,400 seconds (9 hours) can be set for an alarm value. Time can be entered in any numerical format (seconds, minutes:seconds, or hours:minutes:seconds) but will be automatically converted to hours, minutes, and seconds (hh:mm:ss) by the remote terminal.

SET MONITOR GROUP ALARMS
1. Click on **Main Menu**
2. Select **System Configuration**, then **Alarms**, and then click on **Monitor Group Alarms**; View/Modify Monitor Group Alarms window appears
3. Locate monitor group you wish to set an alarm
4. Click in desired data field (i.e., PDN Available, PDN Busy In, etc.), then enter new value
5. Repeat steps 3-4 for each monitor group and field you wish to set
   - or -
   Click on **Save** button on **Main Toolbar** to save changes
6. Close window
EXTERNAL DISPLAY BOARDS

External Display Boards are wall-mounted visual messaging units capable of displaying multiple text messages. Such displays are also known as reader boards or wall-boards. External Display Boards are a cost-effective way of keeping call center agents and managers informed of call activities. A glance at the wall mounted display board can alert staff to a decline in service and initiate an immediate response.

STAT-VU

Stat-VU is an alternative to having wall mounted External Display Boards in order to deliver real-time ACD status information to ACD agents. Call center managers can communicate by sending ACD status and custom messages to all agent positions by a “picture-in-picture” format on the agents’ personal computer.

The External Display Menu is used to program all External Display Board or Stat-VU message sets and messages. Some messaging options vary depending on the external display type installed. For a detailed listing of messaging options, font settings, or version compatibility, please refer to the Perimeter Technology Configuration Guide or the Stat-VU User’s Guide provided on CD Rom or published under the ACD MIS Help Menu.

MESSAGE SETS AND MESSAGES

The ACD MIS allows you to create up to 50 Message Sets for assignment to External Display Boards. Each Message Set can contain up to 100 messages. Messages may contain a mix of text and data fields to display a wide range of statistics received in real-time from the ACD MIS. Each message can be set to display for 1 to 99 seconds before the next message appears.

A message field can specify the presentation-display mode, MIS data, date/time, and/or test condition(s). Messages may contain or display up to nine data fields. Special effects may lengthen the time required to fully display a message. Functionality is based on the type of external display selected.

Stat-VU is a software product capable of displaying multiple text messages on any Windows 95/NT personal computer connected by a Local Area Network (LAN). The ACD MIS remote (Manager) terminal sends the Stat-VU messages over the LAN using TCP/IP protocol. Stat-VU Agent Displays running the application software read and display the messages.
EXTERNAL DISPLAY BOARD MESSAGING OPTIONS

Messaging Options allow you to control how a message is displayed, display data from the ACD MIS, and create special effects within a message. Options will vary based on the software version of the External Display Board.

- **Presentation Mode** – allows you to add effects in the manner messages are presented (i.e., Flash On, Wipe Left to Right, etc.).
- **Date/Time** – lets you display the day of the week, date, and time, in a variety of formats using the ACD MIS remote terminal system date/time information.
- **Display Features** – to add features to highlight information in a message or the message itself (i.e., Blink On, Display Arrow, etc.).
- **Data Value** – used to select data from one or all ACD groups. Displays information on ACD Queue Activity or Agent Activity.
- **Test Conditions** – conditional messages used to trigger alarm messages; use special effects such as blinking, font changes, and/or beeping to attract agents’ attention. Use date/time Test Conditions (Time of Day, Days of Week) to automatically control when a message will appear.

STAT-VU MESSAGING OPTIONS

Messaging Options allow you to control how a message is displayed, display data from the ACD MIS, and create special effects within a message.

- **Presentation Mode** – not available with Stat-VU (External Display Boards only).
- **Date/Time** – lets you display the day of the week, date, and time, in a variety of formats using the ACD MIS remote terminal system date/time information.
- **Display Features** – to change font colors or emit a sound based on conditional thresholds. Features such as Blink On, Display Arrow, etc., are not offered with Stat-VU (only External Display Boards).
- **Data Value** – used to select data from one or all ACD groups. Displays information on ACD Queue Activity or Agent Activity.
- **Test Conditions** – conditional messages used to trigger alarm messages. Uses special effects such as font changes and/or beeping to attract agents’ attention. Use date/time Test Conditions (Time of Day, Days of Week) to automatically control when a message will appear.

### Message Creation

**EXTERNAL DISPLAY BOARDS**

When setting a message Duration, set it three seconds longer than the time it actually takes to display a message. A message containing special presentation effects such as twinkle or interlace takes significantly longer to display than one set to flash on the display. If the display begins to appear scrambled with messages losing characters and/or changing attributes (font type and size), set the message duration to a higher value. Proportional or Non-Proportional spacing must be the first field in a message. The specified spacing mode remains in effect until changed in the first field of another message.

**TIPS FOR CREATING MESSAGES [BOARDS AND STAT-VU]**

- A Message Set must be created first, then messages can be created within the message set. For messages to display, the Message Set must be assigned to an External Display Board or Stat-VU Group.
- Message duration of zero (0) will not display the message.
- Color selection initiated in one message remains in effect until changed to another color in the same or another message.
- Sound beep should always be the last field in a message.
- Keep messages as short as possible, but not so short as to become cryptic. For example “GOS 85%” is more effective than “85%”.
- Set the display duration for the minimum period necessary to display and comprehend a message. Very short message durations can confuse rather than inform a viewer. Long message durations should be reserved for non-critical, text messages.
- Presentation Mode and message length affect the minimum display duration. (External Display Boards Only)
- If optional character spacing specifications are used, it should be the first item entered in presentation mode. (External Display Boards Only)
- Graphics such as car, jet, arrows, etc., requires the use of proportional spacing. Non-Proportional spacing remains in effect until changed in the first field of another message. (External Display Boards Only)
- Scroll mode initiated in one message remains in effect until changed to another scroll mode in the same or another message. (External Display Boards Only)
EXTERNAL DISPLAY BOARD
PRESENTATION MODE OPTIONS

Presentation Mode options are only available with External Display Boards. Presentation modes and message length affect the minimum display duration.

- **Non-Proportional Spacing** – equal spacing is used between individual characters in the message, regardless of character width.
- **Proportional Spacing** – unequal spacing is used between individual characters in the message; spacing varies according to the actual width of the character.
- **Justification (Left, Right, Center)** – words appear butted against the left or right end of the display or centered.
- **Travel** – message moves across the display from right to left an stops at the left.
- **Flash** – each message “appears” on the screen in its entirety.
- **Scroll Up** – message moves upward from bottom of display.
- **Scroll Down** – message moves downward from top of display.
- **Wipe Up** – message “unrolls” upward from bottom of display.
- **Wipe Down** – message “unrolls” downward from top of display.
- **Wipe Left to Right** – message “unrolls” from left to right on the display.
- **Wipe Right to Left** – message “unrolls” from right to left on the display.
- **Interlace** – LEDs are scrambled and “walked” from the right to form the next message.
- **Unveil** – a “curtain” effect reveals the message from its center outwards.
- **Twinkle** – message illuminates randomly to create a twinkling effect.

Display Feature Options

EXTERNAL DISPLAY BOARDS AND STAT-VU

- **Sound Beep** – sounds the beeper on 7415 external displays equipped with the audio option. You may specify the number of times the beeper will sound if the message continues to appear. The Beep field should always be the last field in the message.
  - **Color Red** – change text color to red.
  - **Color Yellow** – change text color to yellow.
  - **Color Green** – change text color to green.

EXTERNAL DISPLAY BOARDS ONLY

- **Blink** – causes the message to begin blinking on/off.
- **Blink Off** – stops the message from blinking on/off.
- **Expand On** – causes the message text to enlarge the width of individual characters.
- **Expand Off** – restores message text to normal width.
- **Inverse On** – reverse the LED on/off pattern for message characters.
- **Inverse Off** – restores LED pattern to normal.
- **Display Eyes** – displays pair of eyes character.
- **Display Car** – displays automobile character.
- **Display Boat** – displays boat character.
- **Display Train** – displays train character.
- **Display Plane** – displays propeller driven airplane character.
- **Display Jet** – displays jet airplane character.
- **Display Left Arrow** – displays left arrow character.
- **Display Right Arrow** – displays right arrow character.
- **Display Up Arrow** – displays up arrow character.
- **Display Down Arrow** – displays down arrow character.

TEST CONDITION OPTIONS

- **Data Value** – real time statistics received from the remote terminal.
- **Time of Day** – specify time of day when message will start and stop playing.
- **Days of Week** – specify day(s) of the week (Monday, Tuesday, etc.) when a message is to be displayed.
- **Day of Month** – specify day(s) of the month (1 through 31) when a message is to be displayed.
- **Date** – specify a specific date (dd/mm/yy) when a message is to be displayed.
- **Link Down** – message will display whenever the data link between the CTS ACD Host and the ACD telephone system is out of service.
TEST CONDITION SYMBOLS
- Test value must be equal to the entered value.
!= Test value must not be equal to the entered value.
>= Test value must be greater than or equal to the entered value.
> Test value must be greater than the entered value.
<= Test value must be less than or equal to the entered value.
< Test value must be less than the entered value.

CREATING A MESSAGE SET AND MESSAGES
Use Delete or Backspace keys to delete characters or any inserted fields within a Message text field and arrow keys to navigate to a specific message field location. For specific instructions on how to set field options for Presentation Modes, Data/Time, Display Features, Data Value, or Test Conditions, refer to the following pages within this section or to the Perimeter Technology Configuration Guide, External Display.

1. Click on Main Menu
2. Select External Display, then click on External Display Messages; View/Modify External Display Messages window appears
3. Click on Message Set window in an empty row field; cursor is positioned within a new row field
4. Enter new Message Set name in row, then press Enter key; Message Set window appears
5. Double click on empty Message field; Message window appears
6. Click in Message text field and enter any text to be shown on display board
7. Click on Insert Field to select desired field options and follow corresponding instructions – if no field options are wanted, skip this step
8. Click OK to save message text and fields; Message Set window appears
9. Click on Duration field and enter amount of time to display message (in seconds)
10. Repeat steps 5 – 9 to add more messages to this message set
- or -
Click on Save button on Main Toolbar to save all changes, then close window
1. Click on **Main Menu**
2. Select **External Display**, then click on **External Display Messages**; View/Modify External Display Messages window appears

3. Double click on name of message set you wish to add a message; Message Set window appears
4. Click on **Add** button on **Main Toolbar**; cursor is positioned at end of message list
5. Double click on **Message** field; Message window appears

6. Click in Message text field and enter any text to be shown on display board
7. Click on **Insert Field** to select desired field options and follow corresponding instructions – if no field options are wanted, skip this step
8. Click **OK** to save message text and fields; Message Set window appears

9. Click on **Duration** field and enter amount of time to display message (in seconds)
10. Repeat steps 4 – 9 to add more messages to this message set
   - or -
   Click on **Save** button on **Main Toolbar** to save all changes, then close window
INSERT PRESENTATION MODE
[EXTERNAL DISPLAY BOARDS ONLY]

For best results, presentation mode field options should appear as the first or second field in a message (after Proportional or Non-Proportional Spacing). The cursor box (⃒) indicates field placement within the message text of the Message field. Multiple presentation modes can be inserted into one message, which are then listed in the Message window to display field position, type/scope, and option/data.

The Presentation Mode remains in effect only for that message. If a presentation mode is not specified anywhere in the Message Set, the display type’s default mode (typically flash) is used to display the message. Refer to page 149 for descriptions of Presentation Mode Options.

FROM THE MESSAGE WINDOW:
1. Click on Insert Field; Insert Data Field/Feature [#] window appears
2. Click on Field Type drop-down arrow and select Presentation Mode
3. Click on Presentation Mode drop-down arrow and select presentation type
4. Click OK; Message window appears
5. Enter any desired text in Message field
6. Repeat steps 1-5 to insert any additional presentation modes for this message
7. Click OK to add message to message set; Message Set window appears
8. Click on Duration field and enter amount of time to display message (in seconds)
9. Click on Save button on Main Toolbar to save changes
**External Displays**

**INSERT DATE/TIME**

Time field messages are automatically reset every one or two seconds (hh:mm:ss) or every minute (hh:mm) by the remote terminal. Presentation modes (other than flash on) should not be used with time field messages that are updated every second.

The cursor box indicates field placement within the message text of the Message field. Inserted date/time fields are listed in the Message window to show field position, type/scope, and option/data selected. Multiple date/time options can be inserted to create a string of date/time information on one message. For example, you could insert the day of the week first, then the date (mm/dd), and then the time (hh:mm) using three date/time field options. The displayed message would read something like this: Wednesday 01/05/03 12:05 PM.

Note: Insert spaces between the field cursor boxes in the message text field when using multiple fields to ensure data does not run together.

**FROM THE MESSAGE WINDOW:**

1. Click on Insert Field; Insert Data Field/Feature [#] window appears
2. Click on Field Type drop-down arrow and select Date/Time
3. Click on Date Option drop-down arrow and selection date/time type
4. Click OK; Message window appears
5. Repeat steps 1 – 4 for additional date/time fields
6. Click OK to add message to message set; Message Set window appears
7. Click on Duration field and enter amount of time to display message (in seconds)
8. Click on Save button on Main Toolbar to save changes
**External Displays**

**INSERT DISPLAY FEATURES**

The cursor box indicates field placement within the message text of the Message field. Inserted display features are listed in the Message window to show field position, type/scope, and option/data selected. Refer to page 150 for descriptions of Display Feature Options.

**FROM THE MESSAGE WINDOW:**

1. Click on **Insert Field**; Insert Data Field/Feature [#] window appears
2. Click on **Field Type** drop-down arrow and select Display Features
3. Click on **Feature Option** drop-down arrow and selection feature type
4. Click **OK**; Message window appears
5. Enter any desired text in Message field
6. Repeat steps 1-5 to insert any additional display features for this message
7. Click **OK** to add message to message set; Message Set window appears
8. Click on **Duration** field and enter amount of time to display message (in seconds)
9. Click on **Save** button on **Main Toolbar** to save changes

---

**View/Modify External Display Messages**

<table>
<thead>
<tr>
<th>Message Set</th>
<th>Message Set A</th>
<th>Editing Message 1</th>
<th>OK</th>
<th>Cancel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field/Position</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Message:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field Type/Scope</td>
<td>Option/Data</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>InsertField</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Insert Data/Feature Field 2**

<table>
<thead>
<tr>
<th>Field Type:</th>
<th>OK</th>
<th>Cancel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Value</td>
<td>Date/Time</td>
<td>Test Condition</td>
</tr>
</tbody>
</table>

**Insert Data/Feature Field 1**

<table>
<thead>
<tr>
<th>Feature Option:</th>
<th>OK</th>
<th>Cancel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sound BEEP</td>
<td>Blink On</td>
<td>Blink Off</td>
</tr>
</tbody>
</table>

**View/Modify External Display Messages**

<table>
<thead>
<tr>
<th>Message Set</th>
<th>Message Set A</th>
<th>Editing Message 1</th>
<th>OK</th>
<th>Cancel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Position</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Message:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field Type/Scope</td>
<td>Option/Data</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Duration Field:</td>
<td>Display Features</td>
<td>Display Eyes</td>
<td>InsertField</td>
<td></td>
</tr>
</tbody>
</table>

---

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INSERT DATA VALUE

Data values are used to retrieve statistical data from the remote terminal to display information such as amount of calls waiting or Grade of Service (GOS) status. The cursor box indicates field placement within the message text of the Message field. Text is usually entered before and after the data value to describe the values being presented. For example, if you pulled the Number in Physical Queue data field, only the number would appear on the message unless you enter text that explained the value: “There are now <data value> calls waiting”. Inserted data values are listed in the Message window to show field position, type/scope, and option/data selected.

Note: Some data value field options may change based on your selection and therefore, may not be described below.

FROM THE MESSAGE WINDOW:

1. Click on Insert Field; Insert Data Field/Feature [#] window appears
2. Click on Field Type drop-down arrow and select Data Value
3. Click on Data Value drop-down arrow and selection value type
4. Click on Scope drop-down arrow and select ACD groups
   - Specific Groups lets you select one or more groups, Full System pulls data for all groups
5. Click OK; Message window appears
6. Enter any desired text in Message field
7. Click OK to add message to message set; Message Set window appears
8. Click on Duration field and enter amount of time to display message (in seconds)
9. Click on Save button on Main Toolbar to save changes

For a detailed listing of data value options and version compatibility, please refer to the Perimeter Technology Configuration Guide, TABLE 4.3: EXTERNAL DISPLAY MESSAGE DATA VALUE TYPES, page 4-16.
INSERT TEST CONDITION

One or more test conditions can be entered as fields in a message. For example, a test condition could be used to control when a message will display. Symbols are used as operators to determine the test value. All test conditions must be met before the message will display. A message containing one or more test conditions will only be displayed when all conditions have been met. If one of the conditions clears, the message will no longer be displayed. The cursor box indicates field placement within the message text of the Message field. Refer to page 151 for descriptions of Test Condition Options and Symbols.

FROM THE MESSAGE WINDOW:
1. Click on Insert Field; Insert Data Field/Feature [#] window appears
2. Click on Field Type drop-down arrow and select Test Condition
3. Click on Test Condition drop-down arrow and selection condition
4. Enter Operator value based on symbol definitions for when you want this condition to occur
5. Enter any other information that is required for condition selected
6. Click OK; Message window appears
7. Enter any desired text in Message field
8. Click OK to add message to message set; Message Set window appears
9. Click on Duration field and enter amount of time to display message (in seconds)
10. Click on Save button on Main Toolbar to save changes
REARRANGING MESSAGE ORDER

1. Click on Main Menu
2. Select External Display, then click on External Display Messages; View/Modify External Display Messages window appears
3. Double click on name of message set you wish to modify; Message Set window appears
4. Click on message you wish to move
5. Click on Promote Row or Demote Row button on Main Toolbar to move message in message list
6. Click on Save button on Main Toolbar to save changes

EDIT A MESSAGE OR MESSAGE DURATION

1. Double click on name of message set
2. Double click on message you wish to modify
3. Make changes from Message window
4. Click OK to return to message set; Message Set window appears
5. Click on Duration field and enter new amount of time to display message (in seconds)
6. Click on Save button on Main Toolbar to save changes

DELETE A MESSAGE

1. Double click on name of message set
2. Click on message you wish to delete
3. Click on Remove button to delete message
4. Click OK to confirm, then click on Save button on Main Toolbar to save changes

Assignment

For messages within a message set to display, the message set must be assigned to a display board or Stat-VU group. One message set can be assigned to multiple External Display Boards or Stat-VU Groups. You can print a list of all assignments when the View/Modify External Display Assignments window is open.

ASSIGN A MESSAGE SET TO DISPLAY

1. Click on Main Menu
2. Select External Display, then click on External Display Assignment; View/Modify External Display Assignments window appears
3. Locate display board or Stat-VU group information under Display Name or Display Description fields for the location you wish to assign a message set, then click on corresponding Message Set name
4. Click on Message Set drop-down arrow, then select message set you wish to assign
5. Click on Save button on Main Toolbar to save changes
External Displays

SAMPLE MESSAGES [PERIMETER TECHNOLOGY]

Message Set Name: Interface 3502/v2.19

<table>
<thead>
<tr>
<th>Msg No.</th>
<th>Duration (Secs)</th>
<th>Message String</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5</td>
<td>&lt;&lt;11&lt;&lt;2&gt;Good Morning &lt;&lt;30&gt;</td>
</tr>
<tr>
<td>2</td>
<td>5</td>
<td>&lt;&lt;11&lt;&lt;2&gt;Good Afternoon &lt;&lt;30&gt;</td>
</tr>
<tr>
<td>3</td>
<td>5</td>
<td>&lt;&lt;11&lt;&lt;2&gt;Good Evening &lt;&lt;30&gt;</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>Grade of Service &lt;&lt;11&gt;&gt;%</td>
</tr>
<tr>
<td>5</td>
<td>5</td>
<td>&lt;&lt;11&lt;&lt;2&gt;OGS Warning&lt;&lt;30&gt;</td>
</tr>
<tr>
<td>6</td>
<td>5</td>
<td>Avg Speed Arns = &lt;&lt;11&lt;&lt;sec</td>
</tr>
<tr>
<td>7</td>
<td>5</td>
<td>&lt;&lt;11&lt;&lt;2&gt;ASA Warning&lt;&lt;30&gt;</td>
</tr>
<tr>
<td>8</td>
<td>5</td>
<td>Occupancy &lt;&lt;11&gt;&gt;%</td>
</tr>
<tr>
<td>9</td>
<td>5</td>
<td>Calls Abandoned &lt;&lt;11&gt;&gt;</td>
</tr>
<tr>
<td>10</td>
<td>5</td>
<td>Calls Offered &lt;&lt;11&gt;&gt;</td>
</tr>
<tr>
<td>11</td>
<td>60</td>
<td>&lt;&lt;11&lt;&lt;2&gt;&lt;&lt;30&gt;Data Link is Down&lt;&lt;4&gt;</td>
</tr>
</tbody>
</table>

Message Contents

<table>
<thead>
<tr>
<th>Msg No.</th>
<th>Field No.</th>
<th>Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;&lt;11&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &gt;= 00:00</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;20&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &lt; 12:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text</td>
<td>&quot;Good Morning&quot;</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;30&gt;&gt;</td>
<td>Date/Time</td>
<td>hh:mm AM/PM</td>
</tr>
<tr>
<td>2</td>
<td>&lt;&lt;11&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &gt;= 12:00</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;20&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &lt; 18:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text</td>
<td>&quot;Good Afternoon&quot;</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;30&gt;&gt;</td>
<td>Date/Time</td>
<td>hh:mm AM/PM</td>
</tr>
<tr>
<td>3</td>
<td>&lt;&lt;11&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &gt;= 18:00</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;20&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &lt;= 23:59</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text</td>
<td>&quot;Good Evening&quot;</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;30&gt;&gt;</td>
<td>Date/Time</td>
<td>hh:mm AM/PM</td>
</tr>
<tr>
<td>4</td>
<td>&lt;&lt;11&gt;&gt;</td>
<td>Data Value</td>
<td>Grade of Service for Interval Group: SVGROUP1 Field Width = 3 &quot;%&quot;</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;20&gt;&gt;</td>
<td>Display Features</td>
<td>Blink On</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text</td>
<td>&quot;OGS Warning!&quot;</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;30&gt;&gt;</td>
<td>Display Features</td>
<td>Blink On</td>
</tr>
</tbody>
</table>

Message Contents

<table>
<thead>
<tr>
<th>Msg No.</th>
<th>Field No.</th>
<th>Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>&lt;&lt;11&gt;&gt;</td>
<td>Presentation Mode</td>
<td>Proportional Spacing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Presentation Mode</td>
<td>Utevel Center Justify</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;20&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &gt;= 00:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Test Condition</td>
<td>Time of Day &lt; 12:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text</td>
<td>&quot;Good Morning&quot;</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;30&gt;&gt;</td>
<td>Date/Time</td>
<td>hh:mm AM/PM</td>
</tr>
<tr>
<td>2</td>
<td>&lt;&lt;11&gt;&gt;</td>
<td>Presentation Mode</td>
<td>Proportional Spacing</td>
</tr>
<tr>
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<td>Presentation Mode</td>
<td>Utevel Center Justify</td>
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<td></td>
<td>&lt;&lt;20&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &gt;= 12:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Test Condition</td>
<td>Time of Day &lt; 18:00</td>
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<tr>
<td></td>
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<td>Text</td>
<td>&quot;Good Afternoon&quot;</td>
</tr>
<tr>
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<td>&lt;&lt;30&gt;&gt;</td>
<td>Date/Time</td>
<td>hh:mm AM/PM</td>
</tr>
<tr>
<td>3</td>
<td>&lt;&lt;11&gt;&gt;</td>
<td>Presentation Mode</td>
<td>Proportional Spacing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Presentation Mode</td>
<td>Utevel Center Justify</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;20&gt;&gt;</td>
<td>Test Condition</td>
<td>Time of Day &gt;= 18:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Test Condition</td>
<td>Time of Day &lt; 23:59</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text</td>
<td>&quot;Good Evening&quot;</td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;30&gt;&gt;</td>
<td>Date/Time</td>
<td>hh:mm AM/PM</td>
</tr>
</tbody>
</table>
Stat-VU Display Screen

Stat-VU software installation and configuration for the Stat-VU Manager (programmed on the ACD MIS remote terminal) and for each agent’s PC, is configured by IT Services. Once Stat-VU is fully configured and operational, ACD agents can access the Stat-VU Display Screen to view External Display messages. External Display messages are entered by call center supervisors/managers in the ACD MIS remote terminal. Refer to Message Creation on page 152 for instructions on message entry.

The Stat-VU Display Screen does not provide global settings. Each agent must open the Stat-VU software on his/her own computer to set personal configuration settings and to view External Display messages. For agents to receive External Display messages, the ACD MIS remote terminal must be on and accessed (logged on by a user).

OPEN STAT-VU DISPLAY SCREEN

The Stat-VU program screen is displayed when launching the Stat-VU software. Before the Display Screen is opened, the program screen must remain open to receive messages. If no connection is made with the CTS ACD MIS Host when the Display Screen is launched, an error message will appear. If this happens, close the Stat-VU program and verify the ACD MIS remote terminal is logged on. Report system errors that cannot be resolved to the IT Services Repair Desk.

1. Click on Start menu
2. Select Programs, then click on Stat-VU; Stat-VU program screen is displayed then automatically minimizes
3. Wait for Stat-VU Display Screen to open; connection is made to IT Services ACD MIS Host, then messages are presented
CONFIGURING STAT-VU DISPLAY SCREEN
Stat-VU includes a Display Configuration dialog box for setting display parameters on the individual agent screen. The Display Configuration window can be accessed from any Stat-VU Display window. Each agent can customize the Window Options or Font Settings for the Stat-VU Display Screen.

DESCRIPTION OF WINDOWS OPTIONS
Window Options allow the agent to customize how the Stat-VU Display Screen is viewed on the computer.

- **Scroll** – when selected, a scroll bar appears along the right edge of the Stat-VU window. When the window becomes full of messages, you are able to scroll up or down the window to see messages that may be out of view. Stat-VU stores the last 200 messages for display. Subsequent messages overwrite the oldest message available for display. If you scroll upward to view messages, you will be bumped to the bottom of the message window when the most current message is displayed.

- **Fixed** – when selected, the Stat-VU window will not have a scroll bar to the right of the window. When the window is full, the next message overwrites the most frequent message on the top of the window. Successive messages sequentially overwrite the next message. The height of the window determines the total number of messages to be displayed at any time.

- **Always on Top** – when selected, the Stat-VU Display Screen will constantly be visible on top of any other open window, when multiple applications are in-use. This option can be selected with the Pop up on Receive option.

- **Pop up on Receive** - when selected, the Stat-VU Display Screen will open automatically (maximize) as soon as a new External Display message is received. This option can be selected with the Always on Top option.

CHANGE WINDOW OPTIONS
1. Click on Stat-VU Menu, then select Display Configuration; Display Configuration dialog box opens
2. Select desired option by clicking on adjacent radio button or check box under Window Options
3. Click OK to save changes
DESCRIPTION OF FONT SETTINGS

Font Settings allow you to customize the font type, font color, and window background color of the Stat-VU Display Screen. The call center supervisor/manager can choose from three colors (red, yellow, or green) when creating a message within the ACD MIS remote terminal. Each receiving agent can then modify those colors, the font, and the background color of the message window. For example, the agent can change “yellow” font that is sent from the ACD MIS remote terminal to appear as purple on his/her screen.

CHANGE FONT SETTINGS – FONT TYPE AND COLOR

1. Click on Stat-VU Menu, then select Display Configuration; Display Configuration dialog box opens

2. Click on Change Font for desired color (RED, YELLOW, or GREEN); Font Screen window appears

3. Select Font, Font style, Size, and/or Color

4. Click OK to make selection

5. Repeat step 2–3 for any additional colors
   - or -
   Click OK to save changes and close window

CHANGE FONT SETTINGS – BACKGROUND COLOR

1. Click on Stat-VU Menu, then select Display Configuration; Display Configuration dialog box opens

2. Click on Background Color for desired color (RED, YELLOW, or GREEN); Color window appears

3. Select color from color chart or define customer color

4. Click OK to make selection

5. Repeat step 2–3 for any additional colors
   - or -
   Click OK to save changes and close window

RESTORE FONT SETTINGS TO DEFAULT

1. Click on Stat-VU Menu, then select Display Configuration; Display Configuration dialog box opens

2. Click on Restore Defaults

3. Click OK to make selection

External Displays