The Right Technology, the Right Results

Oracle CallCenter@nywhere

Administration Quick User Guide

January 2007

Learning Services
Promero

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I. Launching the Administration Manager

ACTION:

- **Login** using below credentials:
    - Company Alias Name: **Your Company Name**
    - UserName: **Your Admin Username**
    - Password: **Your Admin password**
    - **Select** Administration Manager from the main login Window.

II. Global Command Buttons

- These are consistent throughout all 3 modules.

1. **Configure**
    - **Regional Options** screen displays. This allows the Administrator to set the time zone and date format for workstations within your Company.
    - **Timeout Options –** This should be set to 240 to avoid their session ending due to inactivity. It is recommended they do not change this setting.

2. **Help –** This is the complete Supervision Manager User's Guide.

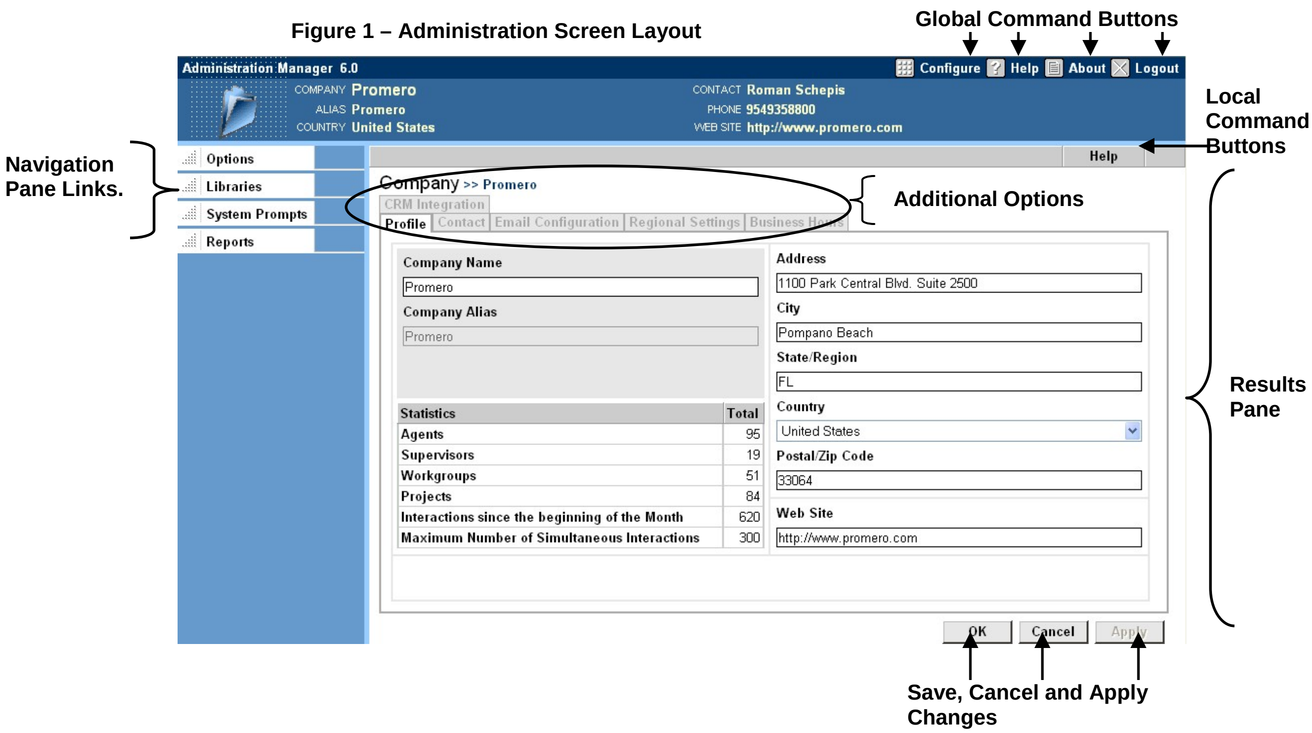
3. **About** – This is the copyright notice from Telephony.

4. **Logout** – Please ensure you always **c**lick **Logout** when not using the system.

III. Administration Screen

- The Administration screen layout. Refer to below Figure 1.

Figure 1 – Administration Screen Layout



- **Navigation Pane Links -** These contain four groups of links to various Administration screens. As you click links in the Navigation Pane, the Administration Manger displays a sort able, tabular list of member objects in the Results Pane. The Administrator uses these options to maneuver throughout the system.

- **Results Pane** – This is a dynamically updated area containing the members of the link you selected in the Navigation pane. The Results pane also contains, when you "drill-down" into a selected object, the editing screens you use to add and modify the properties of these objects.

- **Local Command Buttons** 

  These command buttons allow the Administrator to perform additional functions on screens selected from the Navigation Pane.

  1. **Add –** Allows the Administrator to add a new entry.
  2. **Edit** - Edits the entry you are currently viewing.
  3. **Delete** - Deletes the active entry currently viewing.
  4. **Help** - Displays help about the particular function you are performing.

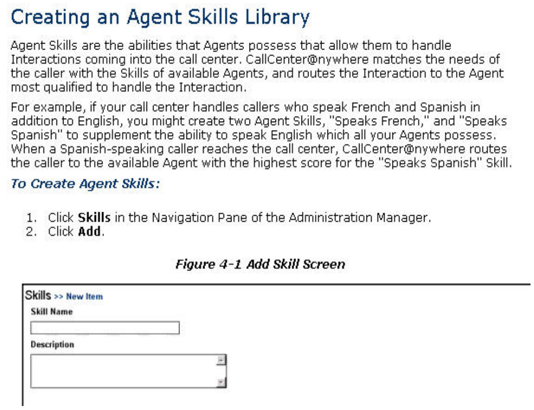
III. Administration Screen (Continued):

For example:

- ✓ Click Skills from the Navigation Pane
- ✓ **Click Help** to demonstrate that help is displayed for Creating an Agent Skills.
- ✓ **Click the X** in top right corner of the browser window to close the Help Screen.

Help is available on every screen and will assist you in performing the function they are currently working on.

Figure 2 – Help Screen Adding Agents



Creating an Agent Skills Library

Agent Skills are the abilities that Agents possess that allow them to handle Interactions coming into the call center. CallCenter@nywhere matches the needs of the caller with the Skills of available Agents, and routes the Interaction to the Agent most qualified to handle the Interaction.

For example, if your call center handles callers who speak French and Spanish in addition to English, you might create two Agent Skills, "Speaks French," and "Speaks Spanish" to supplement the ability to speak English which all your Agents possess. When a Spanish-speaking caller reaches the call center, CallCenter@nywhere routes the caller to the available Agent with the highest score for the "Speaks Spanish" Skill.

To Create Agent Skills:

1. Click **Skills** in the Navigation Pane of the Administration Manager.
2. Click **Add**.

Figure 4-1 Add Skill Screen

Skills >> New Item

Skill Name

Description

- **Additional Options**

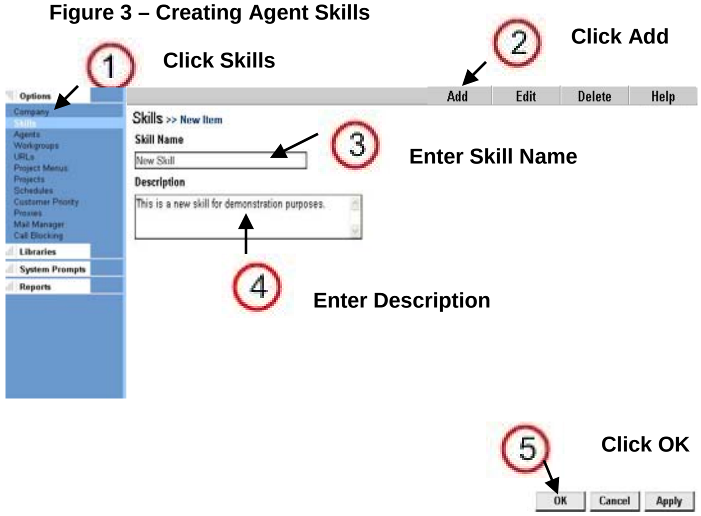
1. **Company** – Contains your Company profile information.
2. **Contact** – Contains your Company Contact information.
3. **Email Configuration** – Contains the email addresses and servers that CallCenter@nywhere uses to handle their Company's email and Agents Interactions.
4. **Regional Settings** - Contains your Company's date format, Company's time zone and Language).
5. **Business Hours** (Your Company's days and hours of operation).

IV. Creating Agent Skills

- These skills are defined by your business rules.

1. **Click Skills** from the Navigation Pane.
2. **Click Add** in the Local Command Buttons.
3. **Enter Skill Name** in the New Item Window.
4. **Enter a Description** regarding this Skill.
5. **Click OK.**

Figure 3 – Creating Agent Skills



Hint: Clicking OK saves your changes and returns them to the main menu; while **clicking Apply** saves changes and keeps you at current screen.

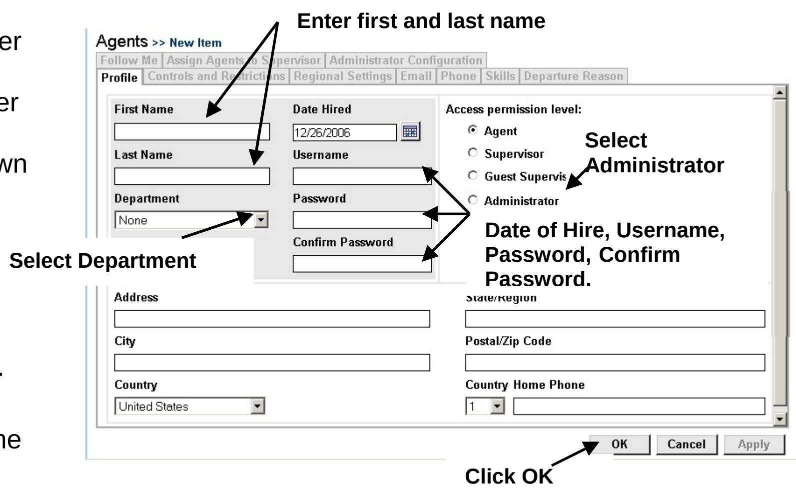
NOTE: The above screens have been modified to add the navigation pane and local command buttons for instructional purposes. The screens you will see will not be exactly as shown above.

V. Adding Agents

1. **Click Agents** from Navigation Pane.
2. **Click Add** in the Local Command Buttons (refer to above Figure 3).

- **Click Profile Tab** (this screen should already be displayed)
  - o **Enter** Agent **First Name** (enter your first name)
  - o **Enter** Agent **Last Name** (enter your last name)
  - o **Select Department** (click down arrow and select your department).
  - o **Select Date of Hire** by clicking on calendar icon
  - o **Enter Username** (enter yours)
  - o **Enter Password (enter your password)**
  - o Confirm Password (enter same password)

Figure 4- Adding Agents



Grey fields are required fields.

- o **Select permission level. Keep in mind you do NOT want many administrators**.
- o **OPTIONAL**: Enter Address information and Phone number fields.
- o **Click OK to save.**

V. Adding Agents (Continued):

- **Controls and Restrictions Tab** (refer to above figure 4)

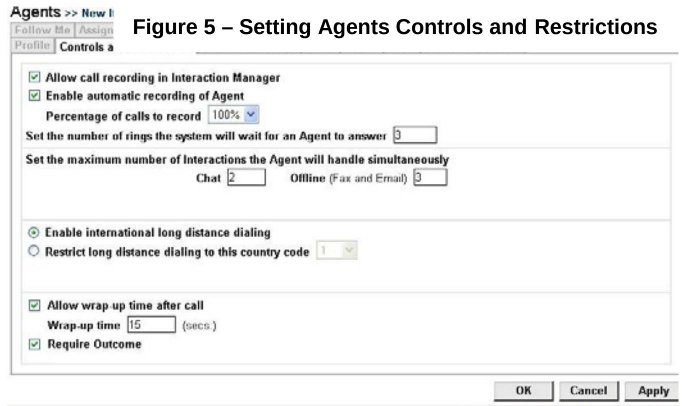


Figure 5 – Setting Agents Controls and Restrictions

  - **Allow call recording** gives the Agent ability to record conversations with callers.

Caution: You need to verify that this is allowed within the state of your call center prior to selecting.

  - **Enable automatic recording of Agent** – Select this when you want to randomly record an Agent.
  - **Percentage of call to record**. This will record all calls of the Agent while he was logged into the system. We also store all recordings on our system for **60** days; this can be extended to meet their business needs.
  - **Set the number of rings the system will wait for an Agent to answer**. This is the maximum number of rings before the Agent's status changes to "No Answer" and the call is placed back into the queue.
  - **Chat box** and **Email boxes**. **-** These are the maximum number of **simultaneous interactions** the Agent will be able to handle while logged in.
  - **Enable International Long Distance Calling** – You can permit the Agent to make international calls by check the radio button.
  - **Restrict Long Distance Dialing to this Country Code** – You can restrict the Agent to make calls only within a specified country code. For example, selecting 1 would permit the Agent to make calls only within the United States.
  - **Wrap-up time after a call** – Check this box to give the Agent time to wrap up a concluded phone interaction.
  - **Wrap-up time –** Enter the number of seconds granted to the Agent for his wrap-up time.
  - **Require outcome –** Checking this box will display a pop up box displaying an Outcome Library at the conclusion of interactions. The Agent would be required enter an outcome. The Outcome library is something you would create and modifier as needed. It will be stored in the Libraries menu under Outcomes. It could consist of options such as no answer, busy, transfer to another workgroup, made sale, etc.

NOTE: Mention they would be able to run reports against Outcomes if this was selected which may be very beneficial to their company.

- **Click Regional Settings Tab** (refer to Figure 5)
  - This is preset for you, but you have the ability to change to whatever time zone and date format that meets their needs.

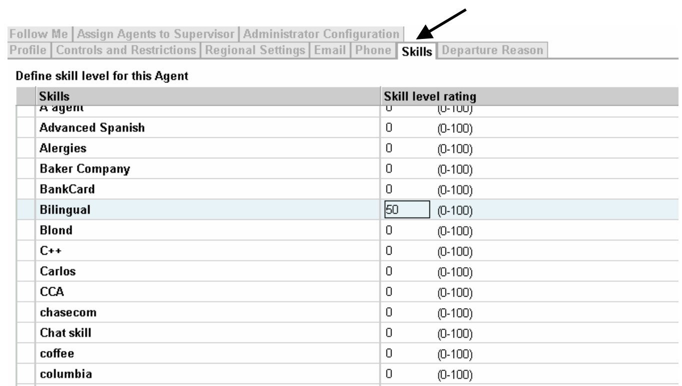
V. Adding Agents (Continued)

- **Click Email Tab** (refer to Figure 5)
  - Agents **cannot** receive email without entering a valid email address in this field.

- **Phone Tab** (refer to Figure 5)
  - **Agent Extension Number** must be entered in the extension field in order for him to receive calls.
  - **Outside Phone –** requires a 10-digit phone number is required in order for the Agent to receive outside calls.
  - **Country Code -** Selecting 1 would restrict Agents to calling only in the United States.

- **Assign a Skill to the new Agent:**
  - **Click Skills** Tab.
  - **Select a skill for an Agent**
  - **Enter** Skill level rating
  - **Click OK**

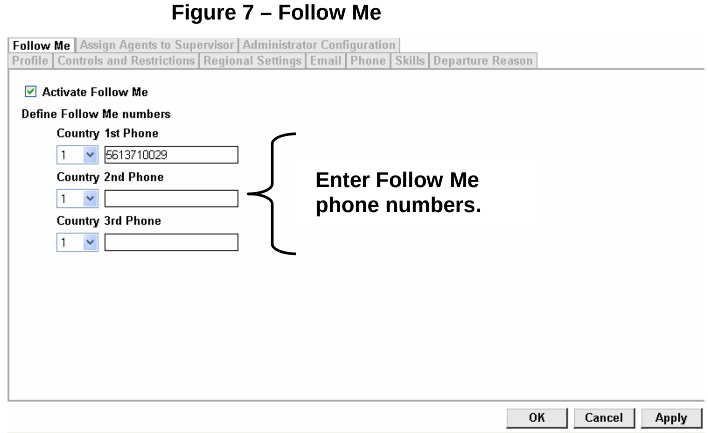
Figure 6 – Adding Agent Skill Level



- **Departure Reason**
  - You can enter a reason why the Agent was removed them from the system. There is currently **no report available** on departure reasons.

- **Follow Me Tab**
  - **You** use this function only when using the CallCenter@nywhere as a phone system.
  - **To activate** the follow-me functions, they would enter another number (such as home phone, cell phone, etc.)

Figure 7 – Follow Me



V. Adding Agents (Continued)

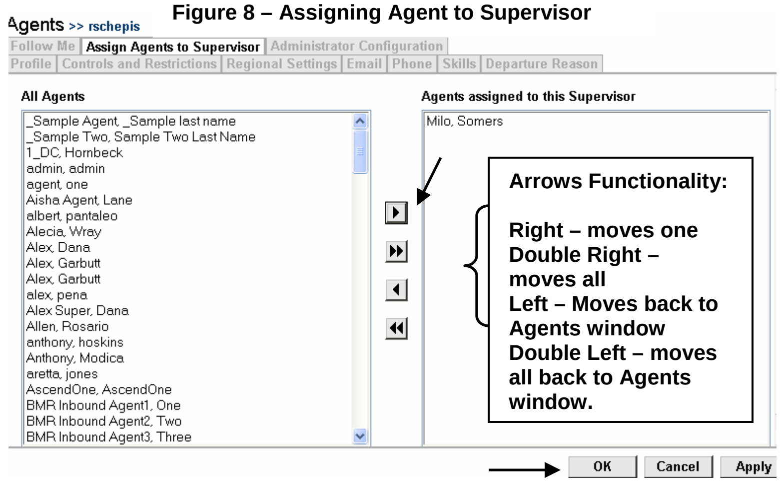
- **Assigning Agents to Supervisor**

Keep in mind: This is a 2 part process:

✓ You need to **create** the agent and save it
✓ **Then Click Agents** in the Navigation Pane.
✓ **Select yourself or a Supervisor** from the Agents Screen
✓ **Then Assign Agents to Supervisor**.

o **Click Assign Agents to Supervisor tab**.

Figure 8 – Assigning Agent to Supervisor



✓ **Scroll** until you find the Agent(s) to assign to Supervisor.
✓ You can select multiple Agents by holding down the **Ctrl** key.
✓ **Click Agent Name.**
✓ **Click the left arrow** to move Agent to Agents applied to this Supervisor window**.**
✓ **Click OK.**

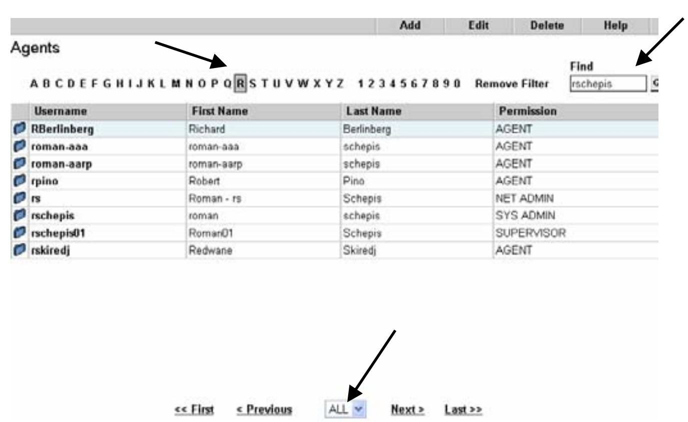
NOTE: If you receive an error message "Agent must have Administrator or Supervisor rights in order to have Agents assigned" this means you need to identify yourself or a supervisor prior to assigning agents. You need administrative or subversion permissions to perform this task.

1. You need to click Agents from the Navigation Pane
2. Scroll until you find the supervisor you want to assign agents to.
3. Highlight the supervisor's name to make that supervisor active
4. Click on Assign Agents to Supervisor tab and select Agents from the All Agents window, and move them to Agents Assigned to this Supervisor window.

NOTE: You have several methods available to edit an Agent.

1. You can click on the **letter** of the First Name **<u>OR</u>**
2. Enter the Agent's First Name or Username in the **Find** window and select **GO**.
3. They can also change to view criteria to **ALL** at bottom of page to avoid from clicking First or Previous to view Agents.

Figure 9 - Finding Agents



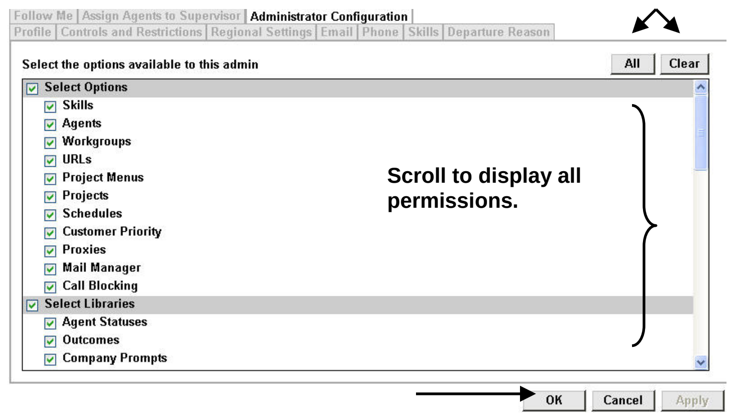
V. Adding Agents (Continued)

- **Administration Configuration** – This is where the Administrator assigns the administrative permissions. Administrators can have different permissions.

1. **Click Administration Configuration Tab**
2. This is where you can limit functionality of an Administrator. You may not want all Administrators to have the same level of permissions.

NOTE: You can click All to add all or Click Clear to remove all permissions.

Figure 10 – Administrative Configuration

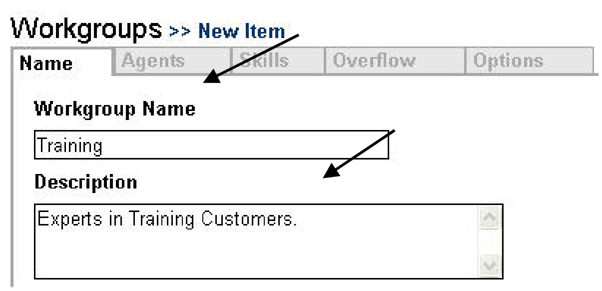


VI. Creating Workgroups

- A workgroup is a group of Agents fulfilling a common job function in your call center. Typically the workgroups you define in CallCenter@nywhere parallel the departments in our company that handle calls from customers.

1. **Click Workgroups** in the Navigation Pane.
2. **Click Add**.
3. **Enter a Workgroup.**
4. **Enter a Description** for this Workgroup.

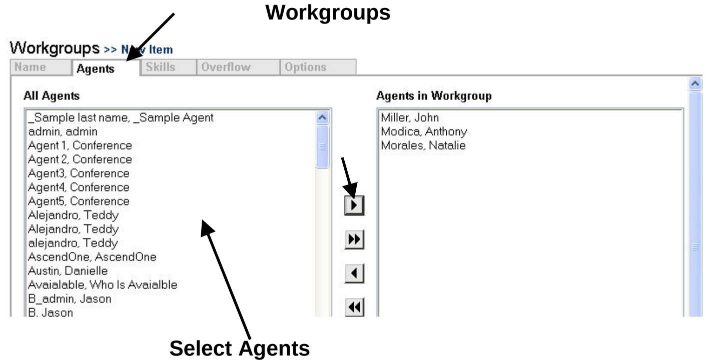
Figure 11 – Creating Workgroups



VI. Creating Workgroups (Continued)

- **Add Agents to the New Workgroup**

Figure 12 – Adding Agents to Workgroups

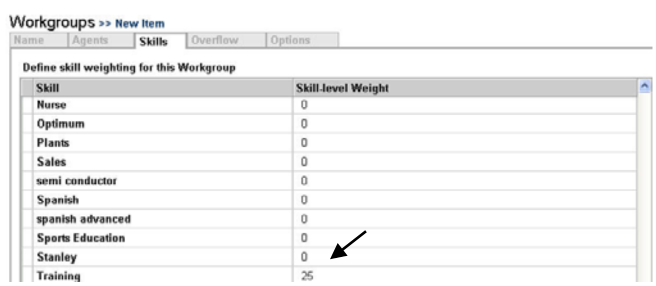


1. **Click Agents Tab**
2. **Select Agents** from "**All Agents**" window.
3. **Click right arrow** to move them to the '"Agents in Workgroup" window.

   Remember: You can select multiple Agents by holding down the Ctrl key.

- **Add Skills to a Workgroup**

Figure 13 – Adding Workgroup Sills



1. **Click Skills** Tab
2. Scroll to **locate workgroup** (we created "Training")
3. **Select the Workgroup Name**
4. **Enter a Skill Level Weight** value (i.e. 25)
5. **Scroll up to Idle Time** (i.e. 75)

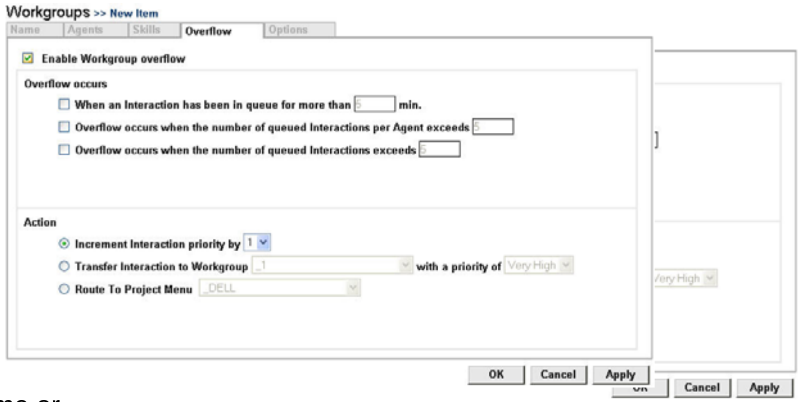
Skill Level Weight factors, for a **workgroup, must equal 100**; thus if a workgroup's skill weight factor is set to 90, you need to set the remaining 10 to idle time. Idle time is a tie breaker; it determines which workgroup has been idled the longest and pushes that call to next available in that workgroup.

The Skill Level Weight Factor **does not need** to equal 100 for individual agents.

VI. Creating Workgroups (Continued)

- **Overflow**

Figure 14 – Handling Workgroup Overflow



1. **Click Overflow tab**
2. **Click Enable Workgroup Overflow**
3. **Overflow Occurs** Options:

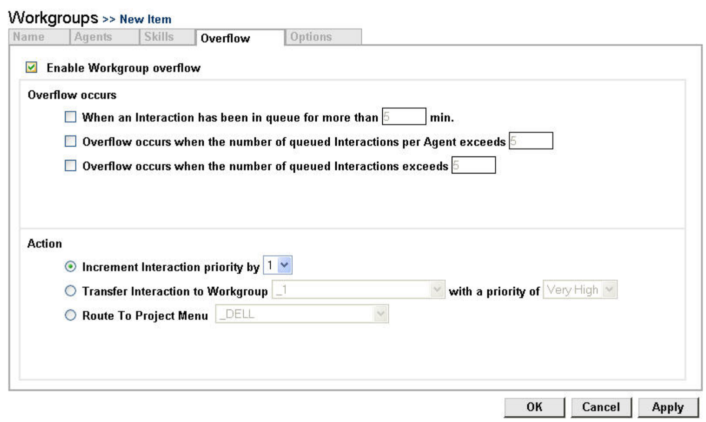
   ✓ You have the ability to instruct CallCenter@nywhere how to handle an interaction that has been in the **queue** more than the specified time or **number** of interactions exceed the limit set.

   ✓ You can tell CallCenter@nywhere what action to take when the rules they identified in the Overflow Occurs options window.

These are all based on your company's business rules.

- **Options**

Figure 15 – Handling Workgroup Overflow



1. **Click Options Tab**

   o For every workgroup within your call center, you can control the choices given to callers who are waiting for an Agent. You can set prompts for callers to identify options as:

   ✓ Play the estimated wait time
   ✓ Allowing customer to exit the queue and request a call back.
   ✓ Allowing the customer to exit the queue and leave a voicemail message.
   ✓ Setting different prompts for callers entering and waiting in the Workgroup queue.

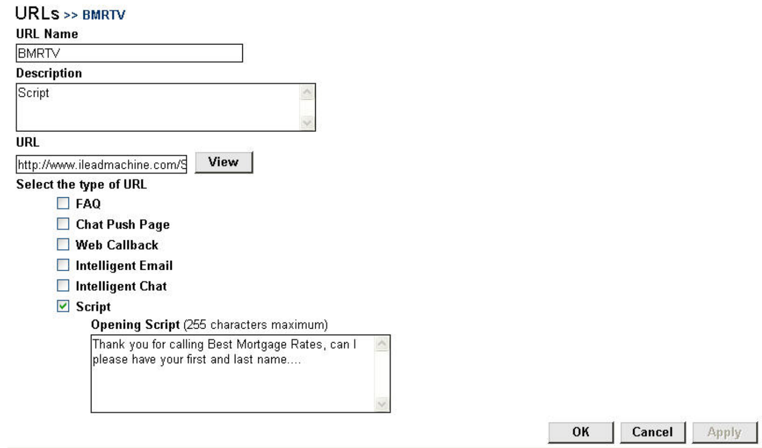
   o **You record your Workgroup prompts** on your PC and send us the file to load.

2. **Click OK.**

VII. Creating URLs

1. Click **URL** in Navigation Pane.
    - These are what you can send us to load. They can be a Word document **saved in HTML** format, a web page, a form, etc. for outbound calls.
    - You can also choose to enter greeting message for inbound callers. This script can contain up to 255 characters.
2. **Click OK.**

Figure 16 – Creating URLs

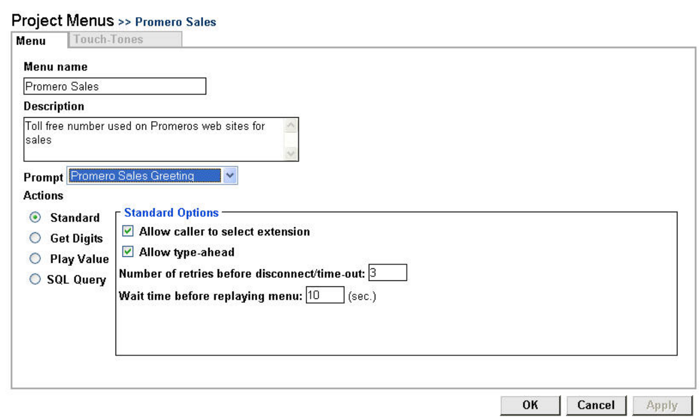


VIII. Creating Project Menus

- Project Menus are not required for a Call Center environment. But they are useful for:
    - ✓ Providing navigation choices to a caller within your call center.
    - ✓ They can complete some pre-work before delivering the call to an Agent.
    - ✓ An interaction can be handled without an Agent's intervention.

1. **Click Project Menus** from Navigation Pane.
2. **Select Add** from the Project Menu list.
3. **Enter a Project Name**
4. **Enter a Description** for the project.
5. **Click drop down menu for Prompt.** This could be a Welcome prompt, i.e.; Thank you for calling, press 1 for Sales, Press 2 for Support, etc.
6. **Actions**: You can set for the caller:

Figure 17 – Creating Project Menus

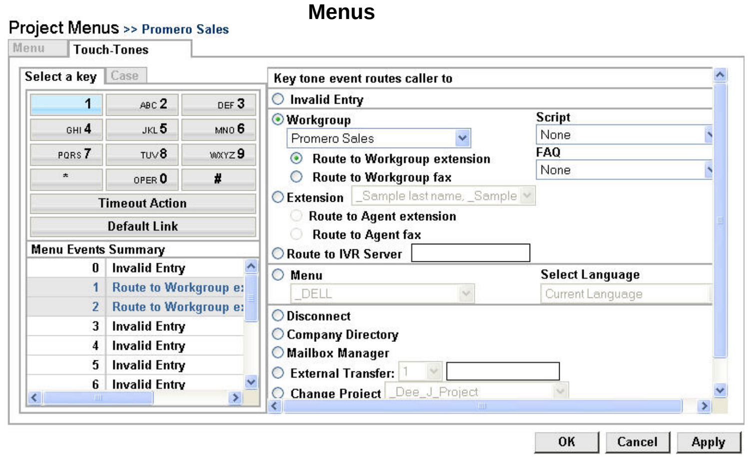


- ✓ Allows caller to enter an extension number.
- ✓ Allows caller to type ahead by pressing the number before the prompt completes.
- ✓ The number of retries before the customer is disconnected (also known as timed-out).
- ✓ Sets the wait time before replaying the menu.

IX. Creating Project Menus

- **Touch Tones Tab**

Figure 18 – Setting up Touch Tone Menus

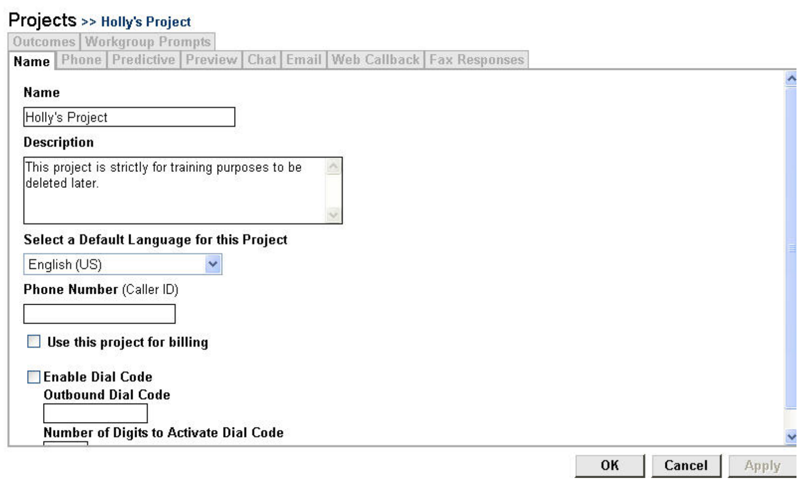


1. These are dual tone multi-frequency and enable them to make routing decisions.
2. You can set up their menu so the caller can press 1 for Spanish, Press 2 for French, etc.
3. You can have menus inside of menus, we currently support 8 languages.
4. You do not need an IT person to set this up; they have all the tools here to do it themselves.
5. Click OK to save change or Cancel f no changes were made.

X. Creating Projects

- **Projects** are the highest hierarchy for inbound calls.

Figure 19 – Creating Projects



1. **Click Projects** in the Navigation Pane.
2. **Click Add** in the Project Window
3. **Enter a Project Name Enter a Description** for Project
4. You can select, from the drop down menu, different languages they could select.
5. **Enter a Phone Number** (i.e.8885555555) – If the customer has caller ID, this is the number they would see.
6. **Check box** "Use this project for billing". **Outbound** calls can be associated with a project. This is why you would want to set up Project Menus. When checked, the Agent would receive a pop up window forcing him to select a project for billing purposes.
7. **Enable Dial Tone** – The system automatically dials the additional digits, following the phone number, when a long distance call is made.
8. **Outbound Dial Tone** – You could enter the digits that will be used as a dial code for this project.
9. **Number of Digits to Activate Dial Tone** – This is the number of digits by which the system will recognize the need to input the dial code. For example, all numbers containing 10 digits or higher will require the dial code.
10. **Click OK or Cancel.**

X. Creating Projects (Continued):

- **Click Phone Tab**

1. **Check Enable Phone Project**
2. **Enter Project Phone Number** (3001) – This field must be filled in for the Agent to receive calls. This would be the phone number that customers dial to reach this project.
3. **Priority** – You can set the priority level for calls coming in regarding this project.
4. **Validate Phone Number**: If Yes is selected, the customer is prompted to enter their phone number. If they fail to enter a valid number after 3 tries, the call is dropped.
5. **Play Confirmation** – If Validate Phone Number is checked, sleeting Play Confirmation will play back the customer's phone number to them.
6. **Use Prompt to ask Customer for ID**: Check to enable customer prioritization. CallCenter@nywhere plays the specified prompt from your Company Prompt Library and requires the customer to enter their ID number. You can use the digits supplied by the call to identify the customer prioritization purposes.

NOTE: Customer Priority Routing must be enabled from the Phone Project Options before the Prompt to ask Customer ID prompt works.

7. **Script** – You can select a script for the Agent to read regarding this project.
8. **FAQ** – You can select a FAQ list for the Agent to read regarding this project.
9. **Route Caller to**: You can select a particular workgroup, an Agent or a Menu.

10. **Prefix Dialing Tab**: This is where you would send calls that do not match the prefix dialing routing groups.

11. **Options Tab** – This is where you could select:

   - ✓ **Menu played after Voicemail -** Select a menu to trigger before the caller leaves a voicemail for an Agent. This feature allows you to give the caller a chance to re-enter the call center before leaving a voicemail message.
   - ✓ **Follow Me –** Select a defined file for **another location** prompt. This allows the call to try to reach an Agent at their forwarding numbers.
   - ✓ **Priorities –** Select to get the customer's priority rating from the database.

   NOTE: If this option is checked, any customer who is not found in the database will receive the lowest priority rating as opposed to the Project Priority.

- **Predictive Dialing**

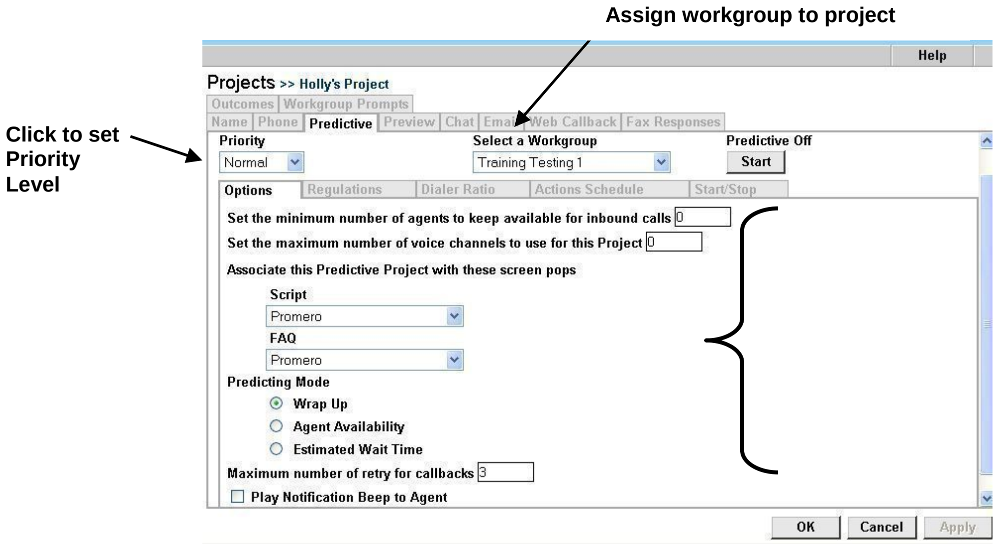
1. **Click Predictive Dialing Tab** – Predictive calls are a list of numbers dialed that are related to a project.
2. **Select Enable Predictive Project**
3. **Click drop down for Priority –** You can set priorities for interactions relating to this project.
4. **Select a Workgroup – You** can assign a particular workgroup to handle Predictive calls for this project.

X. Creating Projects (Continued):

- **Click Options Tab**

1. **Set the Minimum number of agents to keep available for inbound calls**. This is the minimum number of Agents that must be available to handle inbound calls. State the ratio is usually 2 to 1.
2. The **Maximum number of voice channels to use for this project** can be set. This is the maximum number of simultaneously predictive number to dial. This cannot be greater than the number of physical channels available for dialing.
3. They can select a **Script** (URL) to display for Agent.
4. They can have **FAQ** to display on the Agent's screen for this project.
5. **Predicting Mode** – this is how the system determines if an Agent can be added to the pool of Agents available to receive predictive calls.
6. **Maximum number of retries for callbacks –**this determines the number of tries the dialer attempt to reach a contact who requested a callback.
7. **Play Notification Beep to Agent** –when this is set, the Agent receives a beep when they are connected to a predictive call.

Figure 20 – Predictive Dialing — Options Tab



X. Creating Projects (Continued)

- **Regulations Tab**

1. **Click Regulations Tab** –Promero is FCC compliant.
2. **Set Ring Time** –this is the amount of time, in seconds, to ring contact before disconnecting.
3. **Set Tone Detection** –CallCenter@nywhere uses an algorithm to determine whether the call was answered by a person or an answering machine.

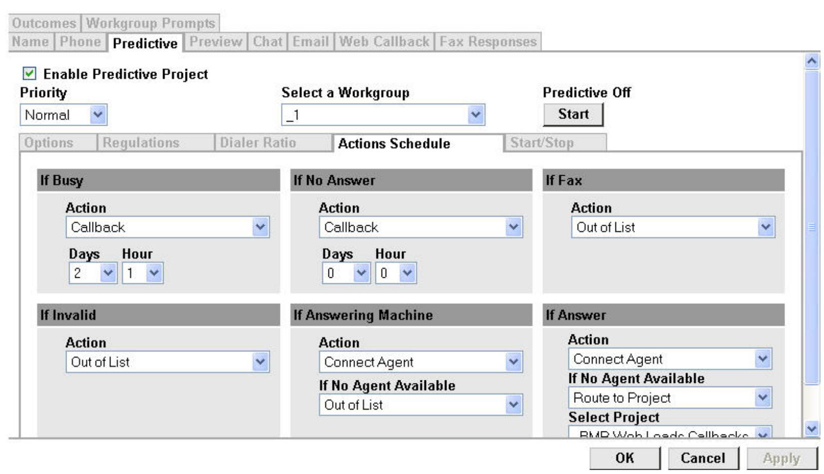
- **Dialer Ratio Tab –**Dialer Ratio is the number of predictive calls made or answered within a period of time.

1. **Dialer Ratio Tab**
2. **Pacing Mode** can be set to dynamically change the rate at which Predictive Calls are placed based on a number of parameters such as failure rate and predictive call attempts and drop ratio.
3. **Maximum Drop Calls Rate –** this is the maximum percentage of dropped predictive calls the system allows.
4. **Sampling Size for pacing algorithm –** this is the number of predictive call attempts to consider when adjusting the pacing algorithm**. For example**, a smaller number results in consideration of only the most call attempts, while a larger number results in consideration of more calls, but some the lest recent calls may not reflect current calling conditions.
5. **Fixed Mode –**this determines the number of predictive call attempts to place based on the number of Agents available at each hour of a 24-day.
6. **Agent Aggressivity Factor – t**his can be set to modify the dialer ratio.
7. **Pool Aggressivity Factor –**this is another multiplier that can be used to modify the dialer ratio.
8. **Minimum Pool Size** –this determines whether the dialer ratio will be multiplied by the Agent Aggressivity Factor or the Pool Aggressivity.

- **Actions Schedule**

Figure 21 – Project Actions Schedule

1. You can set different rules for Agents availability such as:
   - ✓ **If Busy** – Route to another Agent, Voicemail, etc. This may alleviate the drop call problem.
   - ✓ **If there is no Answer** – They route the call someplace else.

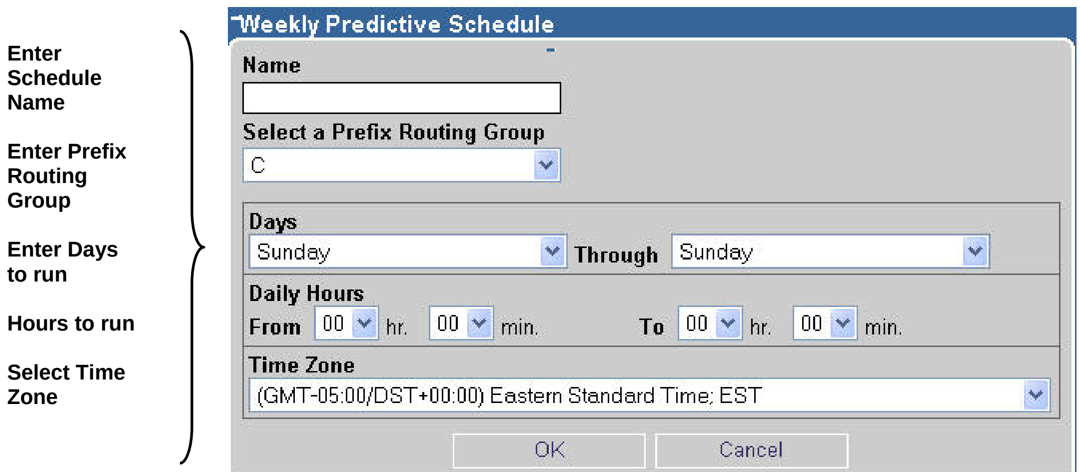


X. Creating Projects (Continued)

- **Click Start/Stop Tab**

1. **Click Scheduled Start/Stop (Recommend** they do a scheduled start/stop as opposed to a manual start/stop.)
2. **Click either the Use Phone for Matching or Use Contact Customized field for matching** radio buttons**.**
3. **Click the + (**the Weekly Predictive Scheduling dialog window displays.)
4. **Enter a name** unique to their Predictive Project in the Name field.
5. **Prefix Routing Group** – Checking this option would dial only those number that match a certain pattern.
6. **Select** the **days of** week for the predictive dialing schedule will run.
7. **Enter** the **daily hours for the predictive dialing schedule to run.**
8. **Select** the **time zone** where this project schedule will run.

Figure 22 – Predictive Start/Stop Schedule



9. **Click OK.**.

- **Preview**

CallCenter@nywhere Preview Project lets your Agents control the placement of outbound calls to customers whose contact information resides in the Predictive table of your CallCenter@nywhere database.

As with a Predictive Project, when an Agent signs on to a Preview Project, CallCenter@nywhere reads Contact information from the database and displays the Contact's name and phone number on the Agent's Interaction Manager screen. When the Agent is ready, he places the Preview call to the Contact, and handles the customer using the Script and FAQ content you associate with the Project.

X. Creating Projects (Continued)

- **Chat Tab**

  Setting up Chat Projects enables the Administrator to control how to handle web-based chat requests such as how they are routed to an Agent, the web pages to display to the customer during the chat, and web page content the Agent sends to the customer.

- **Email Tab**

  Supervisors and Agents to receive emails, at least one project must be set up for email.

- **Web Callback Tab**

  Web Callback projects handle web-based customer requests for a return phone call. As an Administrator, you can control how to route the callback request, the web pages display to the customer and the web pages the Agents provide to the customer.

- **Fax Responses**

  You can select the fax responses they want available for their Agents working on this project.

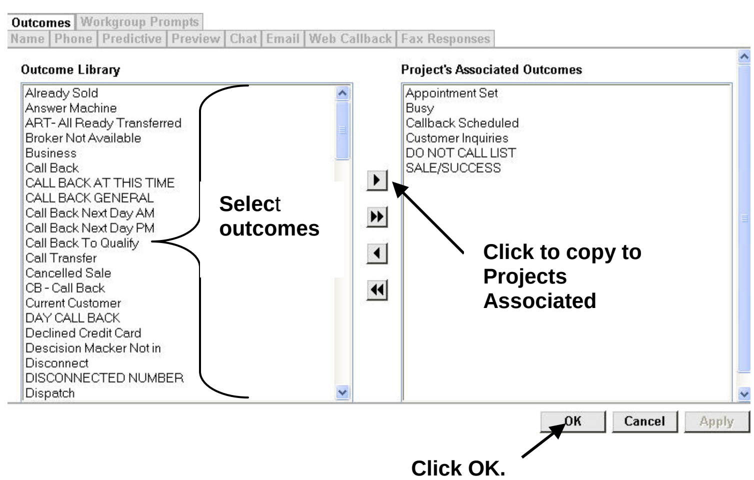
- **Outcomes**

  Tracking outcomes of interactions enhances their ability to measure and compare the performance of their Agents.

  Require Outcomes is enabled when you create/edit an Agent. If enabled, at the conclusion of each call, a pop window displays forcing the Agent to select an outcome for that call. Outcomes are defined by your business rules.

1. **Click Outcomes** Tab
2. **Select one or two outcomes** from the Outcome Library. (Can select more than one by holding down the ctrl key).
3. **Click the right arrow** to add them to Project's Associated Outcomes window.
4. **Click OK**

Figure 23 – Outcome Library



XI. Creating Schedules

- Project Schedules allows the Administrator to set up Project Schedules to handle and route interactions differently during different time periods.
- **Caution** you need to create Projects before setting up Project Schedules.

ACTION:

1. Click Schedules in Navigation Pane.
2. **Select Add.**
3. **Enter** a **name** to identify the Project Schedule.
4. **Enter** a description for the Project Schedule.
5. **Click Default Project** drop down menu and select a Project.
6. **Click Phone** drop down menu and select a phone number associated to a Project.
7. **Click Scheduled Project** drop down menu and select the project to activate.
8. **Select the time zone of the project.**
9. **Start Time** – Enter the hour and minute to start the project schedule.
10. **Select the OK.**

Figure 24 – Setting up Project Schedules

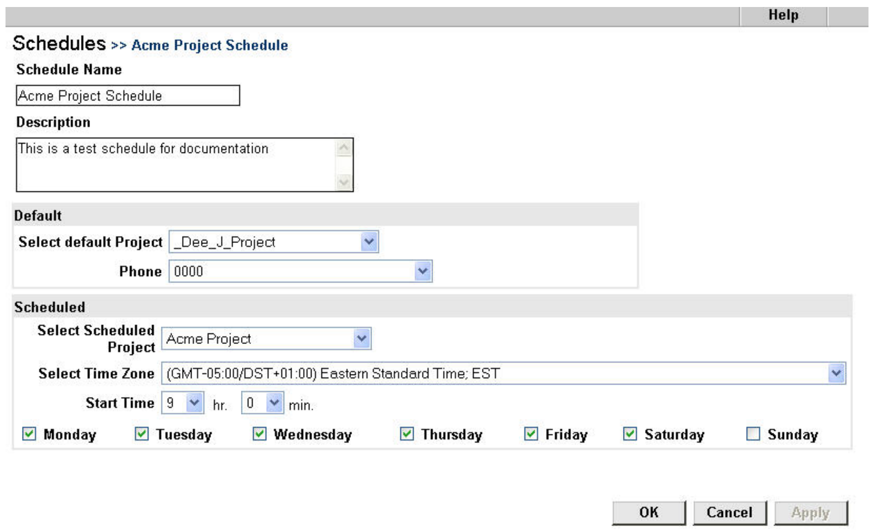
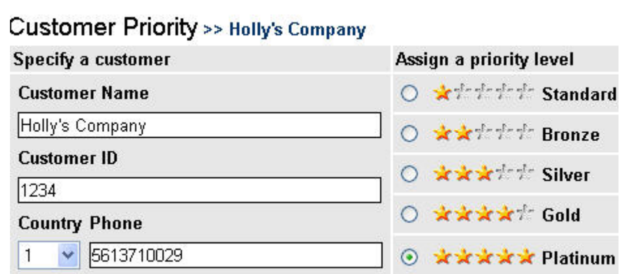


Figure 25 – Company Priority



XII. Company Priority

- **This is where you would rank a customer.** For example, a customer with 5 gold stars would move be first in a queue.

XIII. Proxies

- **This is where a** customer would **connect** to CallCenter@nywhere **through a proxy server**.

XIV. Mail Manager

- CallCenter@nywhere allows the Administrator to **manage email messages**. It there is an email failure, a listing will be provided showing the error; they could then troubleshoot it and resent the message.

XV. Call Blocking

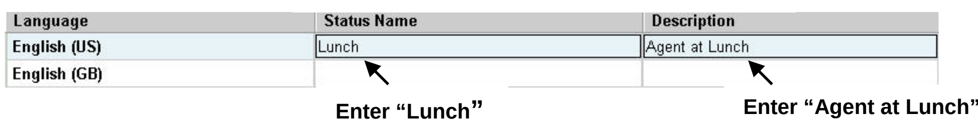
- This option is for **Outbound calls**. The administrator can prevent Agents from placing calls to numbers that have been identified as restricted numbers.

XVI. Libraries

- **This** consists of a collection of objects that determines their Call Center operation.
  - **Adding Agent Status**
    - Here is where you, as the Administrator, would add a new Agent Status.

      1. **Click Agent Status** from the Libraries menu within the Navigation Pane
      2. **Click Add**
      3. **Enter Lunch** in Status Field.
      4. **Enter Agent at Lunch** in Description Field.
      5. **Select On Break** for Choose Meaning for this Status
      6. **Click OK.**

Figure 26 – Adding Agent Status

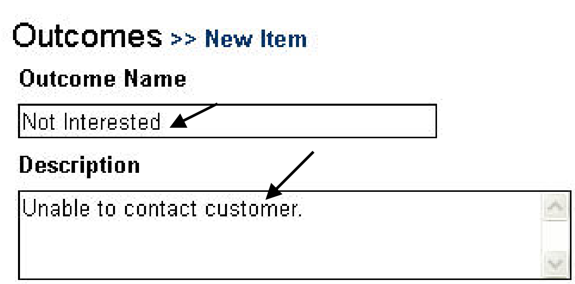


  - **Adding Agent Outcomes**

    As an Administrator, you have the ability to add new **Outcomes**. As stated before, if enabled, at the conclusion of each call the Agent will be forced to enter an outcome for that call. Enabling Outcomes enables you to view the Outcome Statistics report which will analyze, by Agent, the results of all interactions handled by your Call Center.

Figure 27 – Adding Outcomes

1. Click Outcomes from the Libraries menu within the Navigation Pane
2. Click Add
3. Enter a new outcome in the Name Field (for example "Not interested").
4. Enter a description in the Description Field for this new outcome (for example "unable to reach customer").
5. Click OK.



XVII. System Prompts

- You have the option of setting up **.wav files** in order to use them as their company prompts. They would need to record their recordings on their PC and send up the .wav file.

XVIII. Reports

- The **Call Center Key Statistics Report** shows miscellaneous call center usage, Agent performance, and billing statistics for the Projects and Workgroups you select for reporting on.
- Interactions reflected in the Call Center Key Statistics Report are those which were routed to Workgroup Agents by the Automatic Call Distribution system. Calls placed directly to a specific Agent and those placed to a specific number by an Agent are reflected in the Call Center Key Statistics Report.
- You can create tabular and graphical reports to help them understand the trends, activities and Agent performance.

  - **Creating New Reports** (using Call Center Key Statistics Report)

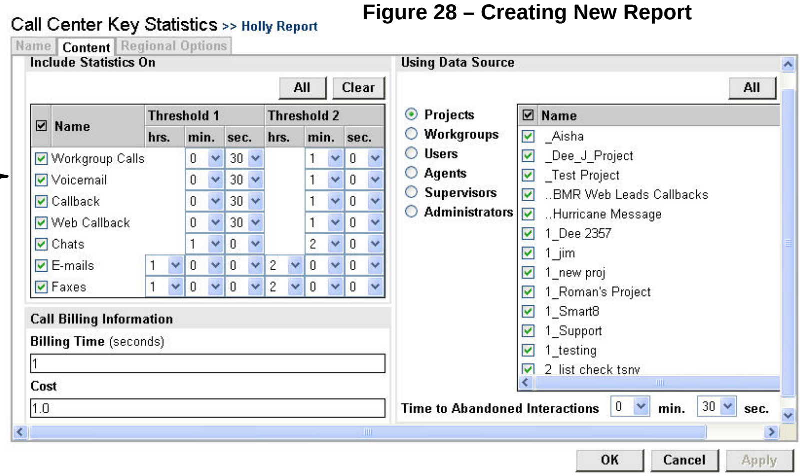
Note: You would follow same below steps for creating any new report from the Reports Menu.

1. Click Reports from Navigation Pane.
2. **Click Call Center Key Statistics.**

   1. Click Add
   2. Enter a report name
   3. Enter a description for the report

3. **Click Content Tab**
   - ✓ Enter the Statistics you want to include for **Threshold 1** and **Threshold 2**
   - ✓ Select if you want Projects, Workgroups, Users, Agents, Supervisor, Administrators
   - ✓ Select the names depending on what you chose in above step.

Figure 28 – Creating New Report



4. **Click Regional Options Tab.**

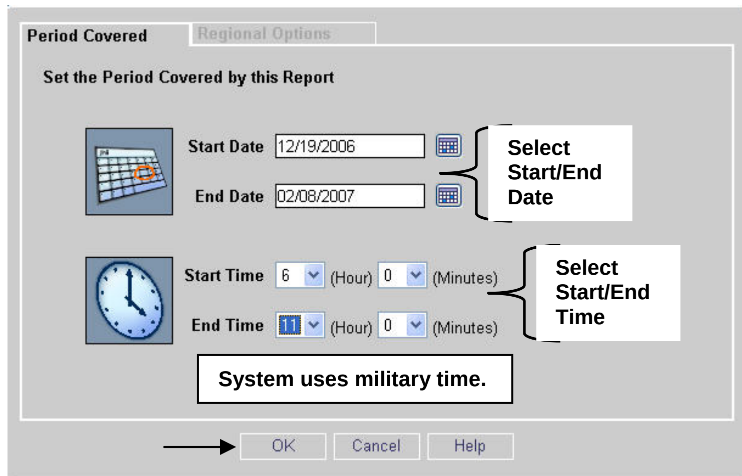
   - ✓ Select Company Default Time Zone or User Time Zone
   - ✓ Select the language for the report
   - ✓ Select Company default Date Format or User Define Date Format
   - ✓ Select the currency format to display

5. **Click OK.**

- o **To View New Report**

1. Click Your New Report
2. Click View
3. A Report Dialog Window displays

Figure 29 – Selecting Report Period Covered



4. Select the start date by clicking the calendar icon. This is the start date you want to start retrieving information for your report. (See below Note.)
5. Select the End date by clicking the calendar icon. This is the end date you want to end retrieving information.
6. Select the Start Time by clicking on down arrow and selecting a hour and then for the minutes.
7. Select the End Time for your report to stop running.
8. Click **Regional Options** Tabs is you want to change the Time Zone for the report to run.
9. Click OK.
10. Your report will display (see below picture).
11. Press Ctrl and Print Screen keys to capture the report to the clipboard. You can then paste it into Microsoft Word for printing purposes.

Note: When selecting dates from the calendar:

Clicking << takes you back one year
Clicking < takes you back one month
Clicking >> takes you ahead one year
Clicking > takes you ahead one month

REMEMBER: Help is available on every screen throughout the system.

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Figure 30 – Call Center Key Statistics Report

Please note that the report displayed contains no data since it is intended only for documentation purposes.

Agent Call Processing	TOTAL	Summary	TOTAL
Average Talk Time	00:00:00	Total Interactions Received	0
Average Hold Time	00:00:00	Total Interactions that Went to Hold	0
Average Process Time per Call	00:00:00	Duration of Interactions	00:00:00

Interaction Type	TOTAL	%	Billing	TOTAL
Direct Inbound	0	0.00 %	Total Billing Unit	0.00
Direct Outbound	0	0.00 %	Cost Per Unit	1
Inbound Extension	0	0.00 %		
Outbound Extension	0	0.00 %		
Total Interactions	0	0 %	Total Billing Amount	$ 0.00